

Chapter Best Practices



Presented by the
CSI Membership Committee
Updated 10/04



Knowledge for Creating
and Sustaining
the Built Environment

I. MEETINGS**A. MEETING LOCATION**

- 1) Choose the best place to hold your meeting
 - a. Business or association office
 - b. Hotel
 - c. Restaurant
 - d. Manufacturing plant
 - e. College or school
 - f. Building of “local interest”
 - g. Library
 - h. Community Center
 - i. Lodge
 - j. Outside (if appropriate)

B. MEETING TIME

- 1) Choose the best time to hold your meeting
 - a. Dinner, lunch, even breakfast
 - b. Immediately following work – no meal
 - c. In conjunction with a tour
 - d. In conjunction with another meeting or event

C. MEETING NOTICE

- 1) Long lead time
 - a. Annual chapter “kick-off” calendar
 - b. Chapter business card
 - c. Verbal: previous chapter meeting
- 2) Imminent (multiple sources desirable)
 - a. Chapter newsletter
 - b. Facsimile announcement
 - c. Telephone “tree” calling
 - d. Local newspaper business section
 - e. Cable television & radio announcement
 - f. Mailed “custom” invitations to selected members and non-members, based on program content and resume(s) of guest speaker(s)
 - g. E-mail announcement
 - h. Newsletters of other related organizations

D. MEETING RESERVATIONS

- 1) “Standing” reservation list at the beginning of the year, with notification only required to cancel, for regulars (no-shows to be billed).
- 2) Ease of response
 - a. Return by checking box on Fax, re-Faxing
 - b. Phone “mailbox” system
 - c. E-mail
 - d. E-vite (www.evite.com)

- 3) Conduct a special “outreach” or information system, for non-affiliated members in the immediate areas, who may not receive the chapter newsletter or local newspaper.

E. MEAL PRICING PROGRAM

- 1) Discount for sponsor of potential member
- 2) Discount for new members (limited time period)
- 3) Discount for student members
- 4) Pre-payment discount for all members
- 5) Lump-sum meal cost as part of chapter dues

F. MEETING HOSPITALITY AND CONDUCT

- 1) Meeting is punctual and follows advertised scheduling
- 2) “Polished” agenda preparation
- 3) Organized logistics, audio-visuals (tested before presentation)
- 4) Clear identification of attendees
 - a. Name tags coded by individual, employer, office in chapter, longevity (new members)
 - b. Verbal introductions with titles
- 5) Overall feeling of warmth and welcome
- 6) Reminders of upcoming Institute, region, and chapter events and deadlines
- 7) Greeters and buddy system for new members
- 8) Self introductions for all members and guests
- 9) Make all announcements from the podium so everyone can see and hear the presenter

G. ANALYSIS OF THE STATUS QUO

- 1) Established meeting day, time, and location versus member commuting distance, member time conflicts, and meal type/cost (consider breakfast or lunch events).
- 2) Actual meeting attendance by membership category (PROF, IND, INT, STU) versus the ratio of membership categories on the current chapter roster (any conclusions?).

H. G.T.G.s (Gimmicks, Teasers, and Games - Keep them coming back!)

- 1) Door Prizes
 - a. Material, donated by companies
 - b. Documents, donated by chapters
- 2) Raffles
 - a. “Mystery Greeter”
 - b. “Double” Chapter Scholarship contribution for forgetting to wear CSI pin
 - c. Cash Award for having current membership application in pocket
 - d. “Split the Pot” 50% to the Chapter, 50% to the lucky meeting attendee
- 3) Educational Credit
 - a. LU Hours (AIA Learning Unit), approved and calculated in advance, for members to use on AIA self-reporting forms, based on meeting program type and duration

I. FOLLOW UP INFORMATION

- 1) “Here’s What You Missed!” article in the subsequent Chapter Newsletter
- 2) Technical Program Review and/or Press Release (with photos) for local print media
- 3) Obtain and share successful event details from neighbor chapters at region conferences or from chapter newsletters

II. PROGRAMS**A. PROGRAM FORMAT**

- 1) PRESENTATION - Choose the best way to present the program
 - a. Appropriate speaker
 - b. Panel
 - c. Tour
 - d. Video
 - e. Member participation (Speak Up, etc.)
 - f. Skit
 - g. Pre-meeting technical session

B. PROGRAM TOPICS

- 1) Technical programs
 - a. Hydrologic cycle and moisture migration
 - b. Steel frame fire protection
 - c. Specifying louvers and dampers
 - d. Structural rehabilitation
 - e. Fire retardant treated plywood
 - f. Flame proofing furnishings
 - g. Cold weather masonry construction
 - h. Materials for setting ceramic tile
 - i. A case study on a structure
 - j. Roofing awareness
 - k. Commercial carpeting requirements
 - l. Indoor air quality
 - m. TQM = Total Quality Management
 - n. Wind design
 - o. Stone fabrication 13th and 21st centuries
 - p. Thermal performance evaluation for building envelopes
 - q. CFCs environmental issues and high efficiency thermal insulations
 - r. Specifying finish hardware
 - s. Changes in the elevator industry
 - t. Volatile organic compounds
 - u. Electrometric wall coatings
 - v. Fire codes
 - w. Composite building materials
 - x. Energy conservation
 - y. UL rated glazing materials
 - z. Toxicity requirements
 - aa. Flat and superflat concrete floors

- bb. Product selection and value engineering
 - cc. People mover technologies
 - dd. Molten carbonate fuel cell power plants
 - ee. Security systems – the cutting edge
 - ff. Concrete restoration
- 2) General Construction Programs
- a. EIFS discussion and electrometric wall coatings
 - b. Hardwood Institute
 - c. Joint meeting with other association(s)
 - d. Meeting with local school of architecture, engineering, or other construction specialties
 - e. Expert analysis of _____
 - f. Working with landscape architects
 - g. Getting the project built (owner's perspective)
 - h. OSHA top 5 cited safety concerns
 - i. 11th Hour of bidding
 - j. Art in architecture
 - 1. Glass design
 - 2. Sculptor
 - 3. Neon lighting
 - 4. Living water creations
 - 5. Murals
 - 6. Wheel-cut glass
 - k. Engineers Week
 - l. Engineering in testing
 - m. Construction management
 - n. Environmental programs
 - 1. After removal, recycle
 - 2. Green design forum
 - 3. Water conservation
 - 4. Ancient forests
 - 5. Environmental site assessments
 - 6. Energy conservation and codes
 - 7. U.S. Green Building Council
 - 8. Radiant barriers
 - 9. Controlling asbestos
 - 10. Coating for steel structures
 - 11. Atrium roof glazing: energy implications
 - 12. HAZCOM construction controversy
 - 13. Radon
 - 14. Pollution liability market
 - 15. CFCs
 - 16. Leak detection technology
 - 17. National Hurricane Society
 - 18. Solar-powered air conditioning
 - o. Smart buildings – Total Building Automation
 - p. Invitation to bid
 - q. Construction forecast of...

1. Military
 2. Schools
 3. Highways
 4. Prison system
 5. Downtown redevelopment
 6. Airports
- r. Historic preservation
 - s. AIA Documents and the revision process
 - t. Designing for maintenance
 - u. Sick Building Syndrome
 - v. Update on Americans with Disabilities Act, including state and local regulations
 - w. Professional estimating
 - x. Product substitutions
 - y. Coordination of contract documents
 - z. What's happening to workmanship?
 - aa. Metric system update
 - bb. Current design trends
- 3) CSI-related programs
- a. Product show
 - b. MasterFormat
 - c. OCCS/OmniClass
 - d. Honor past presidents
 - e. Chapter anniversary celebrations
 - f. Speak Up meeting
 - g. Honors and Awards
 - h. Certification
 - i. Orientation
 - j. Planning retreat
 - k. Audio exchanges
 - l. Product Rep Academy
 - m. CSI University
 - n. CSINet resources
 - o. Resume/Job service
 - p. CSI Membership Awareness Month
- 4) Business related programs
- a. Computer related programs
 1. Word vs. WordPerfect
 2. A/Es on the Internet
 3. AutoCad in the workplace
 - b. Selling to design professionals
 - c. Time management
 - d. Starting your own business
 - e. Decreasing your accounts receivable and keeping your clients
 - f. Workplace hazards: drugs in the workplace
 - g. Private pension plan for small businesses
 - h. Lien law and how to protect yourself
 - i. Networking for career success

- j. Recession resistant business techniques
 - k. Innovation, technology, and service – high-tech gadgetry in communications
 - l. Welcome to the information age
 - m. Network marketing
 - n. Marketing and advertising strategies
- 5) Legal programs
- a. Risks, claims and disasters
 - b. Liquidated damages: who really pays?
 - c. Arbitration law
 - d. Delays for damages: who wins and who loses
 - e. Construction bonding – why? who? how?
 - f. Design/build and tort reform
- 6) Personal programs
- a. Member “roast”
 - b. The price of stress
 - c. Retirement/estate planning
 - d. Health hazards in construction careers
 - e. Personal investments
 - f. Getting a raise/promotion
 - g. Dealing with difficult people
 - h. Public speaking made easy
 - i. Ethics: personal and business
 - j. The basics of parliamentary procedure
 - k. What makes a good leader
 - l. Selling techniques
- 7) General interest programs
- a. Government official (Higher ranking = higher attendance)
 - b. Cultural trusts
 - c. Color dynamics
 - d. Editor or journalist from newspaper, trade publication or local book author
- 8) Special events programs
- a. Parade of presidents
 - b. Unique construction methods at:
 - 1. Disney
 - 2. Town centers
 - c. NASA: space station construction
 - e. Construction in _____ (Choose a country or special interest)
 - d. Visit a foreign country or an overnight trip to see construction site, technology, product manufacturing, or networking
 - e. Recognition of new certificants
 - f. Audio tapes from convention/CSI University & someone who attended
 - g. Awards
 - 1. Recognition of Enablers
 - i. “Significant Other” Appreciation Event or Award
 - ii. Member Employer Appreciation Event or Award

C. PROGRAM OPTIONS

- 1) Assign responsibility for programs
 - a. Committee chairperson
 - b. Rotate responsibility among Board
 - c. Assign one member per program
 - d. President (if chapter is small)

D. PROGRAM “HOW TO”

- 1) Use HUMOR to:
 - a. Attract readers and increase attendance
 - b. Keep the audience alert during the presentation
 - c. Make learning more enjoyable
- 2) CAUTION when using humor
 - a. Use it sparingly, don't detract from the program
 - b. Make sure humor is relative to the topic
 - c. Always use good taste

E. PROGRAM SPEAKERS

- 1) Finding and selecting a good speaker
 - a. Use various methods to locate speaker
 1. Speakers Bureaus
 2. Government agencies
 3. Professional associations
 4. Utility companies
 5. School boards, airports, facilities
 6. College professors
 7. Award-winning firms
 8. Local CSI members (each member has his/her own expertise)
 9. Local celebrities (TV news, authors, entertainers, sports, etc.)
 10. Paid professionals
 - b. Critique the speaker in advance, if possible
 1. Get referrals and recommendations
 2. Attend a different presentation
 3. Ask for references
 4. Listen to a tape, if available
- 2) How to set up the speaker
 - a. Clear with the speaker if there is a fee
 - b. Have the speaker send a bio in advance
 - c. Always tell the speaker how long to talk
 - d. Get as much publicity for speaker as possible
 - e. Ask if any special equipment is needed:
 1. Audio/visual equipment
 2. Microphone (podium or cordless)
 3. Internet connection

4. Table top
 5. Have a glass of water ready
- f. Ask if there will be handouts, and arrange how they will be distributed
 - g. Check if program is already registered with AIA and/or CSI or if it will need to be
 - h. Check the day before, offer transportation (This verifies that the speaker r remembered)
- 3) Starting the presentation
 - a. Thank audience for coming
 - b. Explain, if necessary, how to get continuing education credit for the program
 - c. Remind audience to turn off cell phones, etc.
 - 4) How to properly introduce the speaker
 - a. Study your introduction – do not read it
 - b. Give enough information to stimulate interest
 - c. Use humor but not so personal its offensive
 - d. Never steal the show; do not dramatize yourself
 - e. Do not “over brag” about the speaker
 1. If the bio is too long, abbreviate it, use highlights of what is relevant
 2. Keep it to three minutes or less
 - f. NEVER say “Our speaker needs no introduction”
 - g. If known to everyone, say “Your friend and my friend...Jane Doe”
 - h. Do not give the speaker’s name during the introduction; Refer to him/her as “our guest” or “our speaker”
 - i. Do not move your mouth away from the microphone
 - j. Remember to face your audience as you deliver the last sentence with the name (the speaker knows their own name)
 - k. Take your seat
 - 5) How to stop the speaker
 - a. Have a prearranged signal when five minutes are left
 - b. As the speaker to stay on schedule ahead of time (Remind them of the time allocation before beginning)
 - c. Stand quietly when it is time to close
 - d. Politely interrupt by saying “we have time for one more question” or “we are sorry we don’t have more time for this interesting presentation. Perhaps we can have you visit with us again.”
 - 6) How to properly thank the speaker
 - a. Audience’s show of appreciation (applause)
 - b. Present a certificate of appreciation
 - c. Take a photo for the newsletter or chapter album
 - d. Present a gift or plaque if appropriate
 - e. Be sure to write a thank you letter
 - f. Provide accommodations/transportation for out-of-town speakers
 - g. Write a recap of the presentation for the newsletter

F. TIPS FOR HAVING SUCCESSFUL PROGRAMS

- 1) Choose a popular topic, such as a current event affecting design/construction or a significant industry movement
- 2) Have a long planning period to adequately plan for your program
- 3) Have a sufficient advertising period to get the word out
- 4) Use strong chapter support to evoke enthusiasm for the program
- 5) Ally program presentation with another professional association (which also helps delegate tasks to a broader base)
- 6) Use skilled events moderators
- 7) Choose interesting meeting sites and new locations
- 8) Use post-program success publicity
- 9) Serve good food
- 10) Pass out monthly postcards for each meeting with program information, speaker bio/background, website information, upcoming meeting information, etc.
- 11) Have at least one program a year be presented by someone other than a CSI member
- 12) Make it a responsibility for each committee chairperson or survey membership to develop up programs to create diversity.
- 13) Be aware of the topic they are speaking about, especially if it is a manufacturer and their products. The program should be educational and generic, not mentioning any specific manufacturers.
- 14) Keep in mind that product presentations should only be done twice a year. Tabletops at the monthly meetings are a great way for product reps to introduce their products and it also makes the meetings more interesting.
- 15) Seek out the government, state, and county within your area for topics that pertain to the building industry that affect architects, designers, and general contractors.
- 16) Look toward the utility companies, power, water, gas, and refuse or waste as resources for topics. Each utility company has an impact on each state differently and on each of us individually. These are hot topics for everyone throughout the nation:
 - a. The bureau of land management and how they plan on developing or giving up land for the future. Our prison system and how it functions and how a building is actually built to facilitate these people.
 - b. Military and how they perform within their city within a city type living.
- 17) Standing program committee and chairman

G. G.T.G.s (Gimmicks, Teasers, and Games - Keep them coming back!)

- 1) Program related “tangibles”
 - a. Request handouts from presenter
 - b. Display samples, books, etc.
 - c. Book signing
- 2) Door prizes, raffles, and giveaways
 - a. Get sponsor (or any contributor) to donate a door prize related to the program
 - b. Mementos for each attendee (similar to trade show give-aways)
 - c. Tickets for a free beverage
 - d. Discounts for the next meeting

III. MEMBERSHIP

A. RETENTION

- 1) How to keep your new members as members
 - a. Assign mentors to new members
 - b. Provide special name tags
 - c. Call to remind them of meetings
 - d. Present lapel pin to members & milestone anniversary (newsletter/web)
 - e. Member biography in newsletter
 - f. Assign new members as greeters
 - g. Invite employer, introduce to CSI
 - h. Recognize new members and visitors with self-introductions
 - i. "Welcome" column in newsletter recognizing new member and their firm (feature picture, contact info. how they found out about CSI)
 - j. Special new member rosters
 - k. Give hand-out with year's programs
 - l. Encourage new members to serve on chapter committees
 - m. Assign ambassadors to new members who can make introductions for them at meetings
 - n. Send postcards to members when they miss a meeting advising what the meeting was about and what the next meeting will be about

- 2) How to develop a membership orientation program
 - a. Refer to *Administrative References* (www.csinet.org/adminrefs)
 - b. Schedule orientation regularly
 - c. Annual CSI Awareness Month presentation (www.csinet.org/csiawareness)

- 3) Conduct a new member orientation
 - a. Conduct lunch hour new member orientations. Try to obtain an internet connection to provide an overview of Institute & chapter websites.
 - b. Conduct a bi-annual new member wine & cheese gathering. Invite chapter officers and new members

- 4) Hints for successful on-going orientation program
 - a. Keep inviting until they come
 - b. Use CSI videos and handouts
 - c. Invite employers to orientation
 - d. Have special "chapter" speakers
 - e. Publicize, publicize, publicize
 - f. Recruit committee members
 - g. Ask them for program input
 - h. Point out benefits of CSI membership, fun things chapters do, and community networking

- 5) Establish special retention committee
 - a. Call members prior to renewal
 - b. Survey members
 - c. Send "thanks for renewing" letters
 - d. President calls renewed members
 - e. Ask "Are your expectations met?"
 - f. Host a new member roundtable each year to get feedback

- 6) G.T.G.s (Gimmicks, Teasers, and Games - Keep them coming back!)
 - a. Free business card-size ad for month

- b. Personal announcements in newsletter
 - c. Business announcements in newsletter
 - d. Free meal if they recruit a new member
 - e. Free table top at meeting for renewing
 - f. CSI \$25 Gift Certificate for sponsors
 - g. Free chapter membership for a year
- 7) Standing membership committee and chairman
- 8) Establish marketing plan to recruit, renew, and reinstate members
- a. Publish meeting dates, on-going events, and special events in local outside publications
 - b. Direct mail effort to attract new member prospects to the next month's meeting
 - c. Do not charge students for chapter dues.
 - d. Encourage chapter members to keep membership applications with them or in their office
 - e. Notify other chapters if a member moves into their area
 - f. Have members, including Board members, make office visits to retain and recruit n new members

B. INVOLVEMENT

- 1) Get involved, stay involved
- a. Review roster for non-active members
 - b. Call non-actives to check their interest
 - c. Explain tasks and time needed
 - d. Conduct member survey to determine your chapter's strengths and weaknesses
- 2) Determine committee related tasks to assign
- a. Ask for list of tasks from committee
 - b. Define time to complete
 - c. Define complexity of task
 - d. Write "small task" list
- 3) Small task list examples
- a. Write speaker thank you notes
 - b. Tabulate survey results
 - c. Write articles for newsletter
 - d. Greeter at registration table
 - e. Exhibitor table top arranger
 - f. Introducer for speaker
 - g. Call people each month to remind about meeting
- 4) Large task examples (higher commitment of time)
- a. Serve on committee or task force
 - b. Speak at educational session
 - c. Serve on board of directors
 - d. Coordinate product shows
 - e. Develop community awareness plan
 - f. Host field trip or plant tour
 - g. Become chapter historian

- 5) Passive involvement (no commitment of time)
 - a. Golf outing sponsor
 - b. Host bar sponsor
 - c. Door prizes for product fair
 - d. Encourage nominations for Institute awards
 - e. Scholarship fund sponsor

- 6) Region Involvement
 - a. Set a goal to have a certain number of chapter members attend region conference
 - b. Have chapter members participate in region committees
 - c. Be the host chapter for region conference
 - d. Promote region activities in newsletter
 - g. Encourage chapter members to become region committee chairmen

- 7) Set a goal to have a certain number of chapter members attend convention
 - a. Invite chapter members to submit applications for assistance in attending The CSI Show™ & Convention, CSI University, and/or Regional Conference.
 - b. Host The Annual CSI Show & Convention or CSI University
 - c. Promote Institute activities in newsletter and/or website
 - d. Encourage members to run for Institute director
 - e. Encourage members to join Institute committees

- 8) G.T.G.s (Gimmicks, Teasers, and Games - Keep them coming back!)
 - a. Rewards for perfect attendance
 - b. “Thanks to employers” night
 - c. CSI Chapter Cup
 - d. Award/recognition night
 - f. “Fines” for not wearing CSI pin
 - g. Silent auctions for scholarships

C. HOSPITALITY – HOW TO MAKE MEMBERS FEEL WELCOME

- 1) Hints to make members comfortable at CSI functions
 - a. Inform members if special clothing is to be worn at meeting or function
 - b. Explain convention activities to first time attendees
 1. Host suites
 2. Hospitality night
 3. Delegate role
 4. Annual meeting and member forum
 5. How to meet people
 6. Invite to region caucus
 7. Make plans to meet up in host city
 - c. Continue to mention convention and CSI University dates as part of regular meeting announcements
 - d. Promote special CSI family events
 1. Picnics
 2. Beach parties
 3. Baseball or sports games
 4. Crab feasts, pig roasts

5. Pool parties
 6. Circus events
- e. Special holiday or year-end events with spouses
 1. Dinner cruises
 2. Dances
 3. Theme parties
 4. Chapter anniversary celebrations
 - f. Celebrate new members, fellows, longest member, new certificants, and member of the year
 - g. Have ambassadors or greeters at monthly meetings

D. STUDENT MEMBERSHIP

- 1) Finding Students
 - a. Contact the Following:
 1. School of Architecture
 2. School of Engineering
 3. Trade Schools
 4. Technical Colleges
 5. High Schools with Trade School or Drafting Programs
 6. College Construction Management School
 - b. Offer free local dues to the professor of the above listings
 - c. Advertise in college student handbook
 - d. Invite the classes & find sponsors for CSI Awareness Month
- 2) Student Affiliate
 - a. Have an active student affiliate program
 1. Help the Student Affiliate host annual Student Region Conference.
 2. Dedicate a column of your newsletter for the "Student Newsletter."
 3. Sponsor student events such as scavenger hunts, pizza parties
 - b. Subsidize student meal costs at meetings and/or provide programs at no cost
 1. "Sponsor-a-Student Program" - Members and/or firms provide funds for students' monthly chapter meeting meals.
 2. Donate money to the Affiliate to help students attend The Annual CSI Show & Convention or CSI University.
 3. Provide programs on campus for CSI affiliates or AIA chapters
 4. Maintain affiliation with academic institutions within chapter's locale
 5. Define a role for the student affiliate to assist with the Chapter Product Show. Revenue can then be used by the chapter to subsidize student membership and send student affiliate members to The Annual CSI Show & Convention or CSI University.
 6. Donate materials (tape, hammer, glue, etc.) and money for student affiliate to participate in the CSI Student Competition (www.csi-s.org).
- 3) Offer Reasons to Join
 - a. Mentor members for students "Mentor-A-Student Member Program"
 - b. Job shadowing (intern programs)

- c. Students on site (job site tours just for students)
 - d. Donate technical documents to the school
 - e. Scholarship programs, such as the Dale C. Moll Student Activity Fund (www.csinet.org/honorsandawards)
 - f. Inform them: Have architects as guest speakers at classes to explain what they receive from CSI
- 4) Tips for Involvement in CSI
- a. Adopt a student – Sponsor student meals (or offer discounted meals) and bring them to the meetings!
 - b. Have a student column (even written by students)
 - c. Have a student forum on CSINet
 - d. Sponsor students to conventions & conferences
 - e. Students can help at trade shows and special events
 - f. Encourage/mentor CDT certification before graduation to get a competitive edge in the job market.
 - g. Highlight graduating students with passing CDT scores in chapter newsletter and website.
 - h. Hold an essay competition
- 5) Keeping Track of Potential Members upon Graduation, Changes
- a. Chapter should track school & home addresses
 - b. Identify areas of concentration
 - c. Help contact new chapter when they leave the area to get them invited to a meeting
 - d. Help student change to intermediate membership classification BEFORE graduation!
- 6) **G.T.G.s (Gimmicks, Teasers, and Games - Keep them coming back!)**
- a. Scholarship \$\$\$ for tuition
 - b. Building competition (www.csi-s.org) for students using non-traditional materials (sandcastles, Oreo's, Legos, doghouses, etc.)
 - c. Job placement list in newsletters
 - d. Scholarships to attend convention

E. RECRUITMENT/MEMBERSHIP DRIVES

- 1) Actively participate in CSI Member-Sponsor-A-Member program (www.csinet.org/msam) annually
- 2) Buddy potential member at meeting with someone who can talk about what they've gained from joining
- 3) Use CSI Awareness Month (www.csinet.org/csiawareness) as your membership drive
- 4) Hold a joint meeting with other affiliate groups
- 5) Promote AIA Learning Unit opportunities (CSI is a premier provider – your chapter can offer LUs quite easily!)
- 6) Hold CSI box lunches at A/E firms, contractors, designers, state & local government offices
- 7) Use written testimonials from members locally, regionally, nationally
- 8) Advertise or submit articles in industry publications
- 9) Solicit prizes for most members sponsored
- 10) Chapter sponsors potential new members' meal costs
- 11) Purchase lists of professionally regulated individuals and do a mailing

- 12) Have each member give 3 names for potential recruitment
- 13) Promptly send a new member packet and personal welcome letter to people inquiring about membership, and inviting them to the next meeting
- 14) Home members commit to bring one potential member to each meeting, the chapter pays for the meal and the member gets a reward if the guest joins
- 15) Have a supply of membership promotion materials on hand and distribute them at all chapter functions
- 16) Publish a list of the guests who attended the membership meeting, along with their company name and encourage members to give them a personal testimony of their CSI experience
- 17) Personal Recruitment Tips
 - a. Realize recruitment is the first step to retention
 - b. Put written testimonials for job-specific recruitment in applications
 - c. Carry a filled-in membership application everywhere you go
 - d. Have members send copies of articles from *The Construction Specifier* magazine to their non-CSI peers
 - e. Keep promotional literature handy!
 - f. Have several members contact the same person – peer pressure or join the band wagon!
 - g. Fax, email, or mail pre-printed notes to thank guests for attending
- 18) G.T.G.s (Gimmicks, Teasers, and Games - Keep them coming back!)
 - a. Put membership application in newsletter and website
 - b. Use press releases and interviews with local newspaper and trade journals
 - c. Join your fellow professionals at high school career days
 - d. Procure give-aways (football tickets, hotel brunches, airline tickets, free blueprint services, track lighting, brick pavers, glass blocks, etc.) from members who sign up or recruit new members
 - e. Target specific group for a year and aim all efforts, invites, etc. to that group

IV. EDUCATION

A. SEMINARS

- 1) Offer a variety of continuing education programs
- 2) Purchase equipment, such as an InFocus video projector, to assist in chapter educational activities. Allow the equipment to be available at no cost for the advancement of chapter educational activities.
- 3) Offer seminars at a variety of times to accommodate members, such as morning, lunch-time, etc.
- 4) Establish programs in construction communications and technologies, focusing on improving upon and assisting in maintenance of these programs

B. LOCAL INSTITUTIONS

- 1) Assist local educational institutions in establishing programs and construction communication courses
- 2) Establish and maintain liaison between chapter and schools in locale
 - a. Include elementary, high school, and college aged students.
- 3) Aid associations and organizations with their programs in construction technology

C. OTHER

- 1) Standing education committee and chairman
- 2) Encourage members to contribute education-related articles for publication in chapter newsletters
- 3) Promote the use of CSI's Project Resource Manual in construction communication courses
- 4) Coordinate activities with chapter's certification and technical committees
- 5) Encourage members to participate in construction industry speaker's bureau

V. TECHNICAL

- 1) Standing technical committee and chairman
- 2) Encourage members to contribute articles for publication in chapter newsletters
- 3) Participate in region technical activities
- 4) Participate in Institute technical activities
- 5) Create subcommittees on subjects as appropriate
- 6) Develop technical documents for use within the chapter or by other chapters

VI. CERTIFICATION**A. TUTORIAL**

- 1) Conduct chapter certification tutorial programs
 - a. Offer free exam workshops every Saturday
 - b. Teach classes in electronic format following the curriculum outline provided to the chapter by the Institute.
 - c. Feature mini-quizzes, such as "How's Your CDT Memory?" in chapter newsletter.
 - d. Hold tutorial classes that provide mentoring and coordinate review classes for advanced certification candidates.
 - e. Provide a help-line for questions as CSI members and non-members prepare for examinations.
 - f. Advertise, organize instructors, and order books for the tutorial programs.
 - g. Sponsor an education question contest in the newsletter. Winner receives a grab bag of donated gifts.

B. OTHER

- 1) Standing certification committee and chairman
- 2) Encourage members to contribute related articles for publication in chapter newsletters
- 3) Promote the Institute certification programs
- 4) Have certified members within ranks
- 5) Have at least one candidate sit for every exam

VII. AWARDS**A. INSTITUTE AND REGION**

- 1) Standing awards committee and chairman
- 2) Feature chapter winners in chapter newsletter and/or website

- 3) Membership contributes award articles to chapter newsletters
- 4) Feature award nomination information including criteria, forms, and deadlines (chapter, region, Institute), as well award winners in chapter newsletter and website.
- 5) Submit nominations for region awards program this year
- 6) Submit nominations for Institute awards program this year

B. CHAPTER

- 1) Annual awards program – dinner, ceremony, etc.
- 2) Establish chapter-specific awards and solicit participation and nominations from the chapter. Some actual chapter examples are: “Rookie of the Year Award; Steppin’ Up To the Plate Award; Gem (Genuinely Enthusiastic New Member); “Spark Plug” Award; and the Top Gun Award: Membership (recruiting) award for the member who has contributed the most recruits for the year. This is a traveling award that stays with the winner for a year. Try to unseat the champion and win the award for display in your own office! A large traveling trophy with engraving for each year’s winner is presented the “Top Gun.”

VIII. PRODUCT SHOWS

A. TIPS FOR HAVING SUCCESSFUL PRODUCT SHOWS

- 1) Standing product show committee and chairman
- 2) Present a product show to local construction industry
- 3) Conduct a "Doughnut Run" the day prior to your product show. Distribute doughnuts and personal invitations to as many local architectural firms, engineering firms, and general contractors as you can reach in one morning.
- 4) Participate in affiliate organizations or associations product shows
- 5) Offer seminars for continuing education credits in conjunction with product show
- 6) Have affiliate organizations participate in your show
- 7) Have a CSI booth at product show
- 8) Offer a door prizes, raffles, free gourmet food and beverage (thanks to sponsors), and free admission.
- 9) Provide trophies or certificates for award winning booths.

IX. FINANCE

A. CHAPTER BUDGET

- 1) Standing finance committee
- 2) Prepare and operate on a formal budget
- 3) Maintain a balanced budget at year end
- 4) Include financial statements in chapter newsletter

X. PUBLICATIONS

A. NEWSLETTER

- 1) Standing newsletter committee
- 2) Utilize the Editor’s Journal (www.csinet.org/editorsjournal) to supplement your newsletter with information provided by the Institute.

- 3) Publish a newsletter of at least four issues each year
 - a. If publishing costs are an issue, distribute the newsletter via email.
 - b. Allow members to advertise in chapter newsletter with business cards.
 - c. Offer special sections such as a funny pages, Spec Chat, or chapter best practices section to make the newsletter both informative and entertaining.

B. MEMBERSHIP DIRECTORY

- 1) Publish and distribute membership directory, free of charge (if possible)

C. OTHER

- 1) Produce special promotional pieces or posters
- 2) Publish an operating guide
- 3) Publish photos of chapter meetings/activities in newsletter and/or website
- 4) Provide a pocket guide that lists your chapter’s program series and events.
- 5) Obtain sponsors to help offset publishing costs.
- 6) Provide a calendar of events that features photographs of chapter events, CSI dates, study sessions, seminars, and also contains dates for special AIA, AGC, ABC, ASA, and BOMA events.
- 7) Provide a “Desktop Reference” with pictures, contact information for the Board, committees, events, member benefits, and other basic chapter information.

XI. FUNDRAISERS & SOCIAL EVENTS

A. SCHOLARSHIP PROGRAM

- 1) Standing scholarship committee and chairman
- 2) Encourage members to contribute related articles to chapter newsletters
- 3) Support scholarship fund or student scholastic competitions.
- 4) Membership support other construction industry scholarship funds
- 5) Have an established scholarship foundation
- 6) Have fund raising events for scholarships
 - a. Raise scholarship money through events such as a golf tournament.
- 7) Promote scholarships in local high school and university/college career centers and newspapers

B. EVENTS – FUNDRAISING

- 1) Host a golf tournament
 - a. Offer great prizes: TV, a car for anyone who makes a hole-in-one, \$5 certificate to use in the Pro Shop, etc.
 - b. Solicit promotional items from members to be included in gift bags for golf tournament to advertise individuals’ companies; and also prizes (golf bags, gym bags, etc.)
- 2) Have table top displays at monthly meetings
 - a. Offer a Season Sponsorship Program that includes tabletop sponsorship for the entire year of meeting dates. Includes 1 meal at each meeting, dinner table-top

name-tent on each table, 1 year of CSI membership, a brief presentation opportunity at one of the meetings, etc. (\$900 non-member; \$700 member).

- 3) Sell CSI merchandise, i.e., pins, golf towels, etc.
 - a. Use the sales to help fund scholarship activities
- 4) Have special chapter fund raising events, (excludes product shows)
 - a. Dances
 - b. Auction Nights
- 6) Take advance orders for CSI publications and then order in bulk quantities

B. EVENTS – SOCIAL

- 1) Standing social committee and chairman
- 2) Members contribute related articles to chapter newsletters
- 3) Annual awards banquet
- 4) Holiday gathering or other social functions (chapter meetings excluded)
 - a. Lobster Clambakes
 - b. Annual Picnic/BBQ
 - c. Happy hours
- 5) Start a chapter team and join a bowling or softball league
- 6) Create one community service activity per year

XII. AFFILIATE ORGANIZATION

- 1) Actively pursue liaison with other organizations
- 2) Solicit affiliate group participation at joint meetings
- 3) Solicit affiliate group participation at chapter meetings
- 4) Co-sponsor local construction events or products show
- 5) Maintain liaison with at least one other professional organization
- 6) Announce joint meetings of other design and construction industry associations and organizations in chapter newsletter.

XIII. CHAPTER ADMINISTRATION

A. BYLAWS

- 1) Make sure current bylaws are in agreement with the Institute model
- 2) Have committees appointed in time to be published in Institute Roster

B. BOARD

- 1) Conduct a monthly board of directors meeting
- 2) Pay all or part of cost for committee chairman’s attendance at region conference
- 3) Develop a chapter guide to establish a procedure for transition of chapter leadership
- 4) Communicate membership goals, status reports, and activities

C. INCORPORATION

- 1) Have chapter be incorporated and file tax returns

D. HISTORY

- 1) Appoint a chapter historian
- 2) Record annual history
- 3) Keep historical records
- 4) Maintain a chapter scrapbook – either hard copy or online, or both!

E. LONG RANGE PLANNING

- 1) Standing long-range planning committee
- 2) Have a formal, three-year long-range plan in place and communicate that plan to the chapter membership

XIV. COMMUNITY OUTREACH

- 1) Holiday Charity Drive – community service project.
- 2) Annual Christmas Wreath sale to benefit a local charity, school, etc.
- 3) Participate in “Imagineers” – or another program that increases awareness of construction-related jobs or opportunities for elementary students.