PROGRAM PLANNING GUIDE

I. **INTRODUCTION**

Successful chapter meeting programs have a profound effect upon membership, meeting attendance, and committee activities. Therefore programs should be planned not only for the members, but also to attract prospective members by creating interest in the local CSI chapter. Timely, topical, or provocative programs promote good meeting attendance. The technical and educational work of the CSI chapter can be sustained only through coordinated meeting programs. Successful programs must be thoroughly planned. This includes close cooperation between participants and the appropriate chapter committee.

II. **CHAPTER PROGRAM COMMITTEE**

A. Organization
   1. Chapter Committee:
      a. The chapter program committee is usually a standing committee appointed by the chapter board. Prior to beginning the administrative year, the chapter president appoints the chapter program committee chairman. The president should also approve those members the chairman selects to serve on the committee.
      b. Committees may vary in size. A small committee, however, may be less effective than a large one. A one-person committee cannot provide training for a future program committee chairman, nor can it provide continuity in meeting programs. A multi-member committee, in contrast, can better represent the interests of the overall membership.
   2. Chapter Administrative Guide:
      a. The CSI Chapter Administrative Guide serves as a tool for officers, directors, and committee chairmen involved in chapter activities.
      b. Early in the administrative year the *CSI Administrative References*, which contain the Chapter Administrative Guide, are made available to the chapter president, secretary, treasurer, editor, and the following committee chairmen: education, membership, technical, and program. (These chapter leaders may either order the document from CSI, or they may view the document on CSI's Web site, www.csinet.org.)
      c. Liaison between these chapter committees is important and vital to a successful chapter program. The chapter program committee chairman must always be aware of the functions of other committees and their relationship to the chapter program committee.

B. Duties of the Program Committee Chairman

The recommended duties of the chapter program committee chairman are detailed in the CSI Chapter Administrative Guide. Generally, the responsibilities are to:
   1. Consult with the member of the chapter board responsible for the chapter program committee. Advise the chapter board of the committee's work.
   2. Set requirements for programs and obtain the chapter board's approval of them. These requirements, established early in the administrative year, should be adopted as chapter policy.
   3. Plan and outline chapter meeting programs for the entire year.

4. Submit reports to the chapter board. Chapter program committee chairmen in regions having winter conferences are usually required to submit two reports. The first report, which is required for the monthly meeting of the chapter board preceding the region conference, is included in the chapter's report at the conference so that other chapters can consider duplicating successful programs. The annual report, because it is especially beneficial to future chapter program committee chairmen, is usually required for the last monthly meeting of the chapter board during the administrative year.

5. Call chapter program committee meetings. The committee should have a series of meetings early in the administrative year to establish program requirements, analyze members' needs, discuss programs for the year, and set the first quarter's schedule. The committee should then meet monthly to discuss the current program's status and to update the program schedule for the remainder of the year.

6. Register all programs for LUs and CEUs through the CSI Education Department using **Appendix X** (attached) of the *Administrative References*.

C. Program Requirements
1. The following should be considered when planning programs:
   a. Programs should be nonproprietary. Product promotion or use of trade names is not permitted.
   b. Lecturers or panelists should be knowledgeable in the subject presented.
   c. Opposing viewpoints should be presented.
   d. Suggestions should be offered to resolve problems.
   e. Audience participation should be encouraged.
2. Scheduling the Programs:
   a. The chapter program committee chairman should schedule chapter meeting programs as far in advance as possible. Some chapters plan programs for the entire year; others desire more flexibility. One way to exercise both options is by outlining programs for the entire year and scheduling specific programs quarterly. Three months is usually required for the development of a program.
   b. For chapters that develop annual program outlines, these outlines could acknowledge the chapter's needs by program categories or subjects, without selection of a topic. For example, the committee could outline one program on specification principles, two on contractual requirements, four on building products and techniques, and one on current trends, with the topic predetermined.
3. Standby Programs: One or more standby programs should be planned in case of cancellations.
   a. Whenever a program is canceled a day or two before the scheduled meeting, a lecture is the logical replacement. An attorney specializing in construction law, for example, could be asked on short notice to lecture on his specialty.
   b. The Institute may also have a "program in a box" available on short notice. Contact CSI Member Services for details.
   c. Standby programs should not serve as filler for holes in the schedule. They should be programs planned only for emergency use.
D. Coordination
1. Chapter Board:
   a. The chapter board should designate one of its members to receive the chapter program committee chairman's reports and to coordinate the work of the chapter

      program committee with other chapter committees. The Institute's Chapter
      Administrative Guide recommends that the chapter vice president, technical, be
      given this responsibility.

b. In addition, the chapter board should determine the number of months that a
      meeting program will be required. Some chapters meet monthly; others do not
      have meetings during the summer.

c. The chapter board also assigns the responsibility for recording the meeting
      program. Although this duty is not defined in the Chapter Administrative Guide,
      the program reporter may be the chapter secretary, or the duty may be added to
      either the publications committee's or chapter program committee's
      responsibilities.

2. Chapter House Committee:

a. The chapter house committee makes all arrangements for membership meetings,
      including meeting places and dates. The chapter program committee chairman
      should confer with the house committee chairman to assure that adequate
      meeting space, appropriate seating arrangements for the program participants
      and the audience, and special program aids, such as marker boards, slide
      projectors, or sound systems, are provided.

b. In smaller chapters the functions of the house committee may be combined with
      those of the chapter program committee. The Chapter Administrative Guide
      fully describes the duties of the chapter house committee.

3. Chapter Technical Committee:

a. The chapter technical committee assists the chapter program committee with
      technical information. Since many program topics are primarily technical,
      cooperation between the two committees is essential.

b. The chapter program committee chairman submits program outlines to the
      chapter technical committee, especially those in the building products and
      techniques category. The technical committee, in turn, evaluates technical
      content, recommends participants, and, if necessary, adds opposing viewpoints.
      The chapter technical committee is also responsible for screening highly
      technical programs which should be presented in seminars separate from the
      chapter meeting program.

c. When choosing whether to present a topic as a meeting program or a technical
      seminar, thoroughly consider members' interest and time available for
      presentation. "Waterproofing," for example, would be a program too technical
      for a single chapter meeting program.

4. Chapter Education Committee:

a. The chapter education committee arranges professional instruction and
      continuing education programs. If the chapter is near a university or technical
      school, the education committee should arrange for mutually beneficial
      programs. For example, the committee could arrange a cooperative program
      with a university department head discussing the architectural curriculum and,
      perhaps, the needs of the educational institution.

b. In cooperation with the education committee, the chapter program committee
      chairman provides programs designed to stimulate practitioners' and students'
      interest in construction technology.

c. The education committee is responsible for specialized educational programs
      which should be presented as seminars or short courses separate from the

chapter meeting program. In this regard, the Institute has developed materials in specifications and construction contracts for instructors and students. These course materials can be purchased by chapters who may want to cooperate with a local college in presenting the program or who may wish to offer the program themselves.

5. Chapter Membership Committee:
   a. Indoctrinating new members and encouraging membership growth are responsibilities of the chapter membership committee.
   b. The chapter program committee chairman may encourage new membership by scheduling programs that explain the objectives of CSI and the roles of individual members. If the chapter program committee chairman gives the membership committee chairman advanced notification of proposed chapter meeting topics, prospective members can then be informed of those meetings that might be of interest to them.

6. Chapter Awards Committee:
   a. The chapter program committee provides the chapter awards committee a suitable program for presenting awards. This is usually combined with the annual social night and installation of officers at the end of the administrative year.
   b. Although it is not included in the Institute's Honors and Awards program, a few chapters present a "Best Program Award." If such an award is given, the chapter program committee may be asked to select the award-winning program. If selection is made by the membership, the chapter program committee should nominate outstanding programs.

7. Chapter Nominating Committee:
   The chapter program committee provides the chapter nominating committee a suitable program for electing chapter officers and directors. CSI recommends that the election of chapter officers be held no later than the April meeting before the new fiscal year.

8. Chapter Newsletter Editor:
   a. Along with publishing the chapter newsletter, the editor publishes a program outline for the upcoming monthly meeting. The editor receives information for the outline from the chapter program committee chairman. It should include title and subject, format (presentation method), speaker's name and title, speaker's firm or profession, and a concise paragraph summarizing the subject.
   b. The chapter program committee chairman determines who will have the responsibility of recording the program. A report of the previous month's program is published in the chapter newsletter.

9. Chapter Publicity Committee:
   The chapter publicity committee informs the news media and industry publications about chapter activities. The chapter program committee chairman gives information suitable for publicity of this type to the publicity committee.

10. Chapter Hospitality Committee:
    a. Although this function is not included in the Chapter Administrative Guide, some chapters have a hospitality committee. This committee is usually responsible for planning the social hour at chapter meetings. Also, it may reserve hotel accommodations, make travel arrangements, and extend other courtesies for out-of-town program participants.

        b.   The chapter program committee chairman should provide the hospitality committee with a list of speakers and guests to assure that they are given proper courtesies, such as gratis meals, special name tags, and introductions. In addition, the chapter program committee chairman should forward to the hospitality committee any request from program participants to sponsor the social hour, unless chapter policy prohibits this practice. In general, an open bar is considered undesirable.

11. Chapter Publications Committee:

        a.   The chairman of the publications committee has overall responsibility for preparation, production, and distribution of all chapter publications. The chairman must be fully aware of various means and costs of reproduction methods.

        b. Normally, chapter publications consist of the monthly newsletter, chapter rosters, and special publications (technical papers, membership promotional literature, and rosters or yearbooks that expand beyond that of names and addresses). Quite often, the chairman of the publications committee is also the chapter editor. The Editor's Guide contains the detailed description of this duty. The chairman of the publications committee should be completely familiar with the Institute's policy on use of the CSI Name, Seal, and Logo.

III.   PROGRAM SUBJECT

A.   Classification

1.   Interest: Chapter meeting programs may be chosen for general appeal or may address the special interests of professional, industry, or associate members.

2.   Categories: Programs usually fit one of the following categories:

        a.   Specifications principles.

        b.   Building products and techniques.

        c.   Institute and chapter programs.

        d.   Contractual and other legal requirements.

        e.   Current trends in construction.

        f.   Design considerations.

        g.   Other.

B.   Topics

1.   Sources: The chapter program committee should not be expected to provide original ideas for each chapter meeting. Successful program topics can be found from a number of sources. For example, other chapter committees, membership polls, other chapter newsletters, regional workshops, and current events are all productive sources.

2.   Suggestions: A survey of chapter programs indicates that many chapters duplicate programs of other chapters. For suggested topics refer to **Appendix I** (attached) at the end of the Education Guide of the *Administrative References*.

3.   Modifications: A program topic, although successful for one chapter, may require imaginative modification to meet the needs of another. Modification may be necessary to provide broader interest, adjustments for regional or local considerations, or to avoid overuse of particular topics. For example:

        a.   Rather than discussing "Or Equal," a chapter might discuss the advantages and disadvantages of each of the four ways to specify products, as outlined in the CSI *Manual of Practice*.

      b. A finish schedule as it relates to painting could be presented as a program of general interest by considering a more encompassing form: What information should be provided on the drawings? In what form? What should schedules include? When would the specifications be the proper location for a schedule? Is the professional's liability greater when items are scheduled? How does the subcontractor "take off" the work?

C. Selecting the Subject

    Objectives:

      1. The subject of the program should emphasize the objectives of the Institute. For example, topics could show how to improve specifications, specification writing techniques, legal aspects of construction, and procedures. Additionally, programs could emphasize better communication among specifiers, contractors, and suppliers and inform members of materials, methods, products, techniques, and systems.

      2. The subject of the program should span the interests of all members. A program should not be chosen exclusively to interest any group member. Topics should not be overused and programs should be diverse.

      3. No rigid rule seems to apply about when a common subject might be of interest. "UL Fire Testing," a trite topic in some areas, for example, has been of great interest to others. Often, the degree of prior exposure determines a chapter's interest in a topic.

      4. Chapter meeting programs should feature a variety of categories and a variety of topics within each category. In some chapters, for example, members complain of too many programs about concrete.

      5. Reliance upon the category of building products and techniques will not explain the specifications writing techniques to be used by the professional when specifying those products.

      6. Diversity within a category and across categories is also desirable. Shop drawings, for instance, can span more than one category. As a question for specifications principles, should reproducibles be required in lieu of multiple copies? As a question for contractual requirements, does an "approved" shop drawing constitute a change or, conversely, what about the architect's redesign during the review of submittals?

      7. Topics do not have to be new. For some chapters, the format documents could be of current interest. The chapter program committee should not reject topics on the basis of age alone.

      8. Many chapters schedule joint meetings with the AIA, AGC, or other local construction-related organizations. Joint organizational meetings require special attention to selection of topics of mutual interest.

      9. Such non-technical programs as "personal growth" or social activities should be minimized. However, they can be of use in rounding out the professionalism of members.

      10. The chapter program committee should remember that chapter members' interests change. Over a period of time, some members leave and new members join. Ultimately, these fluctuations create new interest in some subjects.

IV.   PROGRAM PRESENTATION
   A.   Methods of Presentation
      1.   Limited Discussion: This method is used to impart information with limited audience participation. Limited discussion can seek to persuade the audience on a particular viewpoint or resolve a question or problem by coming up with a single course of action or solution. Limited discussions can take several forms:
         a.   A lecture presents information and facts in a straightforward speech. The technique is ideally suited for presenting information to an uninformed audience. The lecturer may use instructional media to supplement what is being said. Audience participation occurs only in questions and comments following the lecture.
         b.   A debate, formalized and replete with rules, offers maximum impact for controversial subjects. For a debate, two speakers or teams argue, taking pro and con stances, with opportunities for rebuttal. Audience participation occurs only during a vote for or against participating teams. A panel of judges can perform the same duty.
         c.   A dialogue is an informal exchange of ideas, including discussions of pros and cons, on a subject. In this give-and-take form, the two speakers carry on a discussion, asking questions and stating ideas. An audience question-and-comment period may follow the discussion.
         d.   During the interview, a variant of the dialogue, one or two participants are questioned by a designated person or panel seeking information on a given subject. The audience usually does not participate.
      2.   Group Discussion: The purpose of group discussion is to enlighten or influence the audience through an exchange of ideas with a variety of points of view. Group discussion may occur whenever a number of persons concerned with a problem work together at a solution, clarification, or accommodation. Group discussions differ in several ways. They may be private one-to-one talks, limited to participants in a small group, or public, including an audience. They may be informal, as in a roundtable, or formal, as in a symposium.
         a.   The panel, in which three or four panel members maintain an informal discussion, is the most popular form of group discussion. A moderator announces the subject, and the panel members talk to each other, asking questions and stating opinions. Panel members are usually selected because of their concern with a particular subject. They do not necessarily take a pro or con position. Questions and comments from the audience usually follow the panel discussion.
         b.   The roundtable, a variant of the panel, involves a larger number of participants. Usually the audience does not participate.
         c.   During a symposium, three or four speakers give short prepared pro or con talks. In this format, the moderator briefly discusses the subject prior to introducing the speakers and summarizes the positions taken by the various speakers. A symposium may evolve into a panel discussion. Questions from the audience may follow the symposium or the ensuing panel discussion.
         d.   The forum, a variant of the symposium, differs in that the participants deliver short prepared speeches but don't take a pro or con position.
         e.   The buzz group, a form of informal group discussions, permits a viable exchange of ideas within a large audience. In one form of this method, the

chairman develops the subject, invites audience participation, and divides the audience into small groups for discussion. Each group formulates a statement or question, which the group's moderator channels to the program chairman for general discussion by the total audience. In another form of the buzz group, the audience is divided into small groups and each group's moderator channels questions to the panel or lecturer for answers. Buzz groups invite maximum participation by the audience. In group discussion, the moderator's role is one of guidance, not participation. A moderator should perform the following functions:

1) Guide the flow of remarks according to the participant's outline.
2) Recognize participants fairly by apportioning coverage of points that may have been overlooked.
3) Prevent needless discussion of irrelevant material.
4) Avoid freely entering into the discussion or otherwise occupying time belonging to the participants.
5) If required, summarize the discussion and conduct the audience's question-and-comment period.

3. Instructional Media:
    a. Audio-visual materials include film, videotapes, slides, and overhead transparencies. They are frequently accompanied by exhibits, models, charts, graphs, drawings, and diagrams. Audio-visual media are often used to supplement more formal presentations.
    b. The demonstration is a graphic use of existing materials and systems or innovative materials and techniques. A demonstration may supplement another type of presentation or it may be the sole presentation.
    c. The field trip is a variant of the demonstration. It may be a guided tour of a manufacturing plant, an assembly area, an educational institution, a governmental installation, or a model city project. Special arrangements are often necessary to provide transportation, food, and safety equipment.

B. Selecting the Methods of Presentation
After the topic has been selected, the chairman should determine the method of presentation that best relates to the audience's level of knowledge:
1. A type of limited discussion by the audience may best present unfamiliar information.
2. A form of presentation with group discussion and audience participation may best relate information to members' experience.
3. A field trip or other type of demonstration may point out problems and relate them to facts.

Controversial subjects should not be forced into a method of presentation that limits opportunities for providing both pros and cons. On the other hand, subjects of a factual nature, such as updates on current laws, codes, or insurance matters, may be best conveyed through a method that limits or does not allow for argument.

V.   **PROGRAM DEVELOPMENT**
   A.   Arrangements
      1.   Participants:
         a.   Developing and following a logical sequence is essential for the chapter program committee to establish momentum for the year's chapter meeting programs. (See **Appendix N**, attached, for checklist.)
         b.   Once subjects and methods of presentation have been selected, the chapter program committee can invite speakers to participate.
         c.   Invitations, preferably written, should briefly state the role of CSI in the construction industry and the anticipated size and composition of the audience, especially for those speakers unfamiliar with CSI. They should state the program title; a brief description of the presentation method; time that will be allotted; list of other participants, if available (participants may be asked to recommend others); and date, time, and location of the meeting.
         d.   After speakers have accepted, provide them with a copy of the chapter program requirements. Provide specifics of the meeting, including exact location and times for social hour, dinner, program commencement, and adjournment. If speakers expect fees, travel expenses, or honorariums, the invitations should state that such remuneration must be negotiated for approval by the chapter board. Request biographical sketches and offer to assist in coordinating lodging and travel arrangements.
         e.   Depending upon the method of presenting the program, a speaker should either submit an outline of the speech for approval or should follow an outline furnished by the chapter.
         f.   The speaker's outline should be reviewed for compliance with chapter policy and objectives of the program. Other chapter committees may be asked to evaluate the outline. An outline developed by the chapter program committee may state major items to be addressed.
         g.   Request from each speaker a list of special program aids. This list should include those items that may not be available from the facility, such as a lavaliere microphone; and those items that must be coordinated with the presentation, such as the type of projector required. Adequate lighting at the rostrum is important when the speakers are making their presentations.
         h.   When the chapter program committee has received acceptances from all speakers and has reached agreements on content, the committee should prepare and distribute a final outline that includes: title or subject, presentation method, biographical sketches of participants, and features of the subject arranged in sequence as in an agenda.
         i.   Copies should be forwarded to each speaker, chapter board, and chapter committees such as hospitality, house, publications, publicity, and membership.
         j.   The speakers should be added to the chapter newsletter mailing list in order to receive at least three issues of the newsletter. Although the first one will not mention the program in which the speaker will be involved, it will acquaint the individual with the general nature of the chapter and the meeting programs. Each speaker should, of course, receive the newsletters in which the program is announced and reported.

2. Other Committees:
   a. The chapter program committee chairman should forward a copy of the program outline to other chapter committees with appropriate notations inserted for special committee action.
   b. The hospitality committee can aid the chapter program committee by providing a comfortable and courteous atmosphere for the speakers prior to the meeting. Speakers should be introduced to each other and to as many members and guests as possible.
   c. The house committee should also provide seating arrangements at the head table, as dictated by the method of presentation used for the program. The chapter program committee chairman, program speakers, and moderator should be seated at the head table.
   d. The house committee should provide supplementary equipment necessary for the program, such as audio-visual equipment, marker boards, special lighting (including a control for dimming lighting during presentations), rostrum, and sound systems.
   e. The publications committee should prominently display a program notice in the chapter newsletter.
   f. The publicity committee can solicit publicity for the program through timely release of program details. The chapter should invite news media representatives to the social hour and dinner.
   g. The membership committee can use the program outline to inform prospective members of programs of interest in their areas of expertise.
   h. Final coordination is necessary immediately prior to the chapter meeting. Members of the key committees should arrive early at the meeting place to take care of last-minute details such as: (a) a pre-program meeting with participants; (b) audience seating and head table arrangement; (c) routine equipment (rostrum, lighting, sound system); (d) availability of special equipment (slide projector, marker board); (e) early arrivals, who should be greeted and introduced to the speakers. The presiding officer should resolve meeting detail conflicts.
3. For more specific direction, please contact Michael T. Owen, Sr., FCSI, CDT; c/o Celtic Management Group, LLC; 633 Jefferson Blvd.; Warwick, RI 02886, telephone number (401) 738-6100, fax number (401) 7389-6149, to purchase a copy of Marketing Techniques for Your Chapter published by the Northeast Region. There will be a charge of $5 plus postage to cover the cost of reproduction and shipping.

B. The Chapter Meeting
1. Conducting the Program:
   a. At the scheduled time for beginning the meeting, the chapter president or presiding officer introduces the chapter program committee chairman. At this time the chapter program committee chairman assumes control of the meeting until the conclusion of the program. The introduction of the program should be brief, but contain enough details to convey to the audience the purpose of the program.
   b. The chapter program committee chairman should speak clearly and distinctly. Having ascertained the correct pronunciation of speakers' names, the introductions should include: (1) the title or subject of the program; (2) the

method of presentation; and (3) the name, title, firm, or profession of each speaker including the moderator.

   c. The chapter program committee chairman, if acting as moderator, continues to preside until the program concludes. If not, control of the program goes to a moderator or temporary chairman.

   d. If the moderator is a local chapter member, he or she remains in control through the audience question-and-comment period. If a guest, the moderator can return control of the meeting to the chapter program committee chairman who, in turn, will moderate the question-and-comment period.

   e. Audience participation may require prompting. For example, it may be necessary to "break the ice" by planting a few questions with members of the audience. But no matter what the technique, audience participation definitely should be encouraged when the delivery method calls for it.

   f. Promptly at the designated time, the moderator or chairman should thank the speakers and return control of the meeting to the chapter's presiding officer.

   g. If preprinted certificates are furnished to program presenters, the presiding officer should make presentation at this time.

2. In evaluating a chapter program meeting, consider the following:

   a. Did the program accomplish what was expected? If not, why? What can be done to improve the meeting? Often, the chapter program committee, deeply involved in program preparation, becomes too subjective to make a valid evaluation of individual meetings. Evaluation by the membership or a selected panel may be required. A variety of responses, solicited and unsolicited, can aid in evaluation.

   b. Solicited responses can be obtained by having a printed questionnaire at each place setting at a meeting, except at the head table. The questionnaire might include the following:

      1) Rate the program 1 (highest) to 4 (lowest) as follows:

         a) Overall

         b) Participants

         c) Content

      2) List any items you consider unnecessary or excessive.

      3) List any items of interest on the subject covered that were not included.

   c. Immediately following the program, the house committee should collect the questionnaires and forward them to the chapter program committee chairman for review and action.

   d. Solicited responses can come by word of mouth if selected members ask others their opinion immediately following the program.

   e. Unsolicited responses are communicated in a less direct manner. Attuned chapter program committee members can detect high motivation in the audience by observing certain symptoms, such as rapt attention to the speakers and several audience members vying for recognition during the question-and-comment period. Conversely, signs of boredom in the audience can indicate that some portion of the program has gone awry.

   f. The chairman should note the audience's responses in the evaluation report.

C. Post-Meeting Functions

   1. Acknowledgment:

      a. Every successful meeting program is the result of the speakers' services. If the chapter does not present certificates to the speakers at the conclusion of the

       meeting, the chapter secretary or program chairman should send a thank-you letter to each speaker no later than one week following the chapter meeting. If photographs were taken during the meeting, forward copies to the speakers.

    b.   Send the chapter newsletter containing the program report to the speakers. Preferably, the speakers should be on the newsletter mailing list prior to their appearances; a copy should be forwarded in the month following the program.

2.   Monthly Report:

    a.   The details of the program should be recorded as soon as possible following the monthly meeting. A report on the meeting should include: subject, method of presentation, and names of speakers with their titles, firms, or professions. These items should have been recorded in the program outline submitted for publication in the chapter newsletter preceding the meeting. A summary of program content should be more expansive than the one included in the earlier program outline. The chairman should also summarize the audience's evaluation comments and his personal observations. This should not be included in any report of the program published in the newsletter but should have as its purpose to assist the chapter program committee in determining the feasibility of similar programs in the future. The house committee should provide the number attending with a breakdown by professional members, industry members, associate members, and visitors.

    b.   The monthly program report should be distributed to the publications committee and publicity committee. The chapter program committee should retain a copy. Although the publications committee's copy forms the basis of a featured news item for publication in the chapter newsletter, the chapter editor should assign the meeting to a reporter. With publication of a summary of program content, chapter members who did not attend the meeting have access to information presented.

    c.   The publications committee can make appropriate information from the report available for the local news media. The chapter program committee uses its copy in preparing the annual report.

    d.   A secondary value is that sequential program information can be recorded in a chapter program committee portfolio that can be turned over to the chapter program committee chairman's successor at the end of the administrative year.

3.   Annual Reports:

    a.   Collating the monthly meeting reports into annual reports to the chapter board culminates the chapter program committee's formal activity. A report is usually required for the last chapter board meeting of the administrative year. It should list possible programs that arose out of last year's events, including any speakers who have said they would like to present programs and suggestions for programs received from the membership.

    b.   Program chairmen of chapters in regions having a winter conference usually have to submit an earlier report for inclusion in a chapter's report at the region conference. Due to the conference dates in these regions, programs planned for the latter part of the administrative year must be "scheduled programs."

VI.   CHAPTER MEETING PROGRAM TOPICS

The program information and topics suggested in **Appendix I** (attached) of the Education Guide of the *Administrative References*, include subjects and resources identified from a survey of CSI chapters and professional and trade associations. These topics, offered only as a partial list, should

give way to discussions of additional ideas. Specific programs could have considerable variations on these suggestions depending upon the imagination of the chapter program committee. Possible resources for speakers and program material should be confirmed by contacting the person or organization listed. Present costs and availability of materials may vary from the information as listed.

Application for Continuing Education Units (CEUs)

Part 1 - APPLICANT

A. CONTACT INFORMATION

Program Contact: _____
Organization: _____
Address: _____
City _____ State _____ Zip _____
Ph: _____ Fax: _____ Email: _____

B. PROGRAM INFORMATION

Program Title: _____

Program Objective: _____
_____

Brief Description: _____
_____

Program Format: ❑ Seminar   ❑ Forum   ❑ Study Course
                   ❑ How-to Demonstration   ❑ Other: _____

Hours of Instruction: _____ Proposed Location: _____
Proposed Date: _____ Proposed Time: _____
Intended Audience: _____

Check One: ❑ New program submitted for CSI Continuing Education Unit (CEU) approval
              ❑ Previously approved program for CEUs, but:
              ___ Different Presenters (biographical sketch must accompany submittal)
              ___ Change to content and/or format of program
              ___ Change to length of program

PART II - CSI SPONSOR

A. CSI CHAPTER OR REGION SPONSOR

Contact: _____
CSI Chapter or Region: _____
Address: _____
City _____ State _____ Zip _____
Ph: _____ Fax: _____ Email: _____

Program Content and Format   ❑ Approved   ❑ Previously Submitted _____
                              ❑ Not Approved   ❑ Comments :_____

Signature _____ Date Reviewed: _____

PART III - CSI USE ONLY

Program is ❑ Approved   ❑ Not Approved: _____
CEUs Awarded: _____ ECHs Awarded: _____

_____   _____
   Professional Development Coordinator's Signature   Date Submitted

APPLICATION FOR CONTINUING EDUCATION UNITS - DETAILS
Submit application to a CSI chapter or region no later then four weeks prior to the submitted programs start date. The CSI Institute grants final approval and sends approval for CEUs /ECHs no later then 5-7 days before the program start date.

CSI Chapter or Region should submit form to: CSI, Professional Development Coordinator, 99 Canal Center Plaza, Ste. 300, Alexandria, VA 22314   Fax: 703-684-0465

INSTRUCTIONS
1. Attach a separate, timed outline of the proposed program , indicating the exact hours to be devoted to instruction and those to be used for registration or breaks.
2. Attach biographical data for each instructor of the program. The data should outline the individual's qualifications to present the program.

NOTE - If the instructor or content/format changes for a program already approved for CEUs, then a copy of the application with new format/content and/or new biographical data must be submitted to approve the changed program for CEUs.

DIRECTIONS
Continuing Education Units (CEUs)
Ten instructional contact hours are required for one CEU. The contact hour is defined as a typical 60-minute classroom instructional session or its equivalent. CEUs are approved for organized continuing education activities that have responsible sponsorship, capable direction, and qualified instruction.

One educational/instructional contact hour (ECH) is equal to one hour of learning time. Programs approved for CEUs are automatically awarded appropriate ECHs for participants.

Examples of educational activities include traditional classroom sessions such as seminars and forums. Non-traditional study can be approved for CEUs provided there is qualified supervision. Non-traditional methods of instruction include laboratory sessions, case studies, field trips, directed reading, or independent study.

Sponsorship
The continuing education program must be sponsored by The Construction Specifications Institute, a CSI chapter, or region. Responsibility for organizing the activity must be assigned to a specific person who is responsible for assigning tasks and overseeing the execution of the activity. The program must be approved in advance by submitting the appropriate forms to CSI's Professional Development Department.

Planning
The continuing education program must be planned in response to the educational needs of a target group. There must be opportunity for input from members of that group as well as individuals having content expertise and knowledge of the educational objectives to be met.

Objectives
A clear statement of purpose must be prepared for each educational activity prior to its initiation.

Instruction
The instructional staff must demonstrate competence in the subject matter, an understanding of the program objectives, the ability to convey information in an organized manner, and skill in applying the learning methods agreed upon.

Multiple dates/locations for the same presentation being presented in a workshop demonstration with a "how-to" format will only require sponsorship from one CSI Chapter or Region and submission to CSI Professional Development for approval of CEUs.

Certification examinations-study courses for exams to qualify for continuing education credit, but only if an Application for CEUs is submitted prior to the study course and is approved.

CSI does not award continuing education credit for:
Programs with instructors or sponsors whose sole purpose is to promote commercial business, products and services to program participants. Presentations that are solely proprietary do not qualify as instructional time.

Performance
Specific performance requirements for the participants must be established during the planning process and be met before CEUs can be awarded.

Performance criteria should be used to enhance the participant's understanding of the subject matter and include a method of feedback or response.

The performance criteria should be in keeping with the structure of the program. In some cases attendance is all that is required.

Evaluation
Ways to measure the effectiveness of the program must be established during the planning process and must be completed within two weeks following the activity.

Methods of evaluation can be informal or structured and can include observations, verbal comments, or written questionnaires. The evaluation should be recorded in the program report and used in future planning.

Participant Registration
Registration must include sufficient information to allow for a permanent record of individual participation. This includes each person's complete name and address, payment, and dates of attendance. It also requires the name of the sponsoring group, the title of the program, and the number of CEUs/ECHs awarded.

Cost of Certificates

A $5 administrative fee per certificate is charged for processing and issuing CEU/ECH awards. The Institute will issue certificates for approved programs upon receipt of payment and a roster of participants, or individual requests from an approved Registration Form for CEUs/ECHs. Allow 3-4 weeks for processing.

Program Changes
If changes are made to approve programs, an Application of CEUs must be submitted with the new supporting information: i.e., changes in content/format, speakers, length of program. Note: changes to location of program do not need to be submitted.

SUGGESTED TOPICS FOR CHAPTER PROGRAMS

I.   Contract Development
   A.   Types of Construction Contracts
   B.   Identifying Authority and Duties of Architect and Engineer
   C.   Responsibilities and Rights of the Owner
   D.   Liquidated Damages and Penalty Clauses
   E.   Professional Liability Insurance
   F.   Legal Problems
   G.   The Law and Professional Ethics in Engineering or Architectural-Related Insurance Requirements
   H.   Contracts Relating to Field Supervision and Inspection
   I.   Construction Management
   J.   Post-Bid Negotiations
   K.   Design-Build
   L.   Separate Contracts

II.   Specification Development
   A.   Principles of Specification Writing
   B.   Types of Specifications
   C.   The Use of Reference Standards
   D.   CSI's Formats for Construction Specifications
   E.   General Provisions of Specifications
   F.   Technical Provisions of Specifications
   G.   Specification Language
   H.   Standard Manufacturer Specifications
   I.   Guarantees
   J.   Design-Build
   K.   Performance Specifications
   L.   Developing Outline Specifications
   M.   Master Specification Systems
   N.   Use of Master Specifications
   O.   Supplementary Conditions
   P.   *MasterFormat*
   Q.   *SectionFormat*
   R.   What it Takes to Make Specifications (A panel discussion on writing and using construction specifications. Members of the building industry comment on "The Value of Proper Specifications.")
   S.   Back to Basics (A discussion of basic specification writing.)
   T.   Specifications and Their Problems (A panel discussion with an architect, engineer, contractor, and supplier regarding problems encountered in specifications.)
   U.   Using the CSI *Manual of Practice* (Division 1-General Requirements contains many program topics. These are not receiving the same degree of attention as Divisions 2 - 16.)
   V.   Computer Macros in Specification development
   W.   The Internet

III.   Building Products and Techniques
A.   Subjects are as numerous as the subjects in the *MasterFormat* Key Word Index.
B.   Some topics and logical meeting subjects are easily overlooked: "Contract Furniture" (which has increasing application), "Landscaping," "Modular Construction," or "Paving." As an improvement over the discussion of a particular product, the program topic may concern the more general use of products, such as "Architectural Acoustics"-a study of the meaning of acoustics and the proper use of acoustical products in building construction or "Roofing Failures".
C.   The program may also demonstrate a product or technique: "Concrete Field Testing" or "Spray Applied Fireproofing."
D.   The partial list of program resources from trade associations may suggest additional ideas.

IV.   Project Execution
A.   Construction Management
B.   Literature Storage and Material Retrieval Problems
C.   Shop Drawings
D.   Change Orders
E.   Litigation and Arbitration
F.   Construction Insurance
G.   Execution and Endorsement of Specifications
H.   Project Closeout
I.   Public and Private Construction
J.   Financing Construction Projects
K.   Selection of Construction Methods
L.   Development of Construction Projects
M.   Use of Specifications in the Field
N.   Dealing with "Extras" to the Contract
O.   Value Engineering
P.   Life Cycle costing
Q.   Bidding Practice for Federal Government Contracts
R.   Bidding Procedures
S.   Surety Bonds and Prequalification of Contractors
T.   Superintendents Speak Out (A panel of construction superintendents explaining their problems with specifications)
U.   Responsible for What? (A discussion of gaps in contract administration.)
V.   Continuing Responsibility (A discussion of proper completion and closing out of a building project)
W.   Contract Conflicts (A discussion of who pays for night watchmen, clean up, retainage)
X.   Mechanics' Liens
Y.   Labor Laws in Construction Work
Z.   Selection of the Contractor

V.   Design Considerations and Construction Trends
A.   Building for the Elderly and Disabled
B.   Procedure for Interior Design
C.   Impact of ASHRAE Code 90-75
D.   Metric System (SI)

E.   Energy Conservation
F.   Pollution Solutions
G.   Solar Energy
H.   Bidding from Microfilm
I.   Use of Aerial Photos in Design and Construction
J.   How Effective are the Architect(s) Working Drawings?
K.   Computer Assisted Design Programs

VI.   Institute and Chapter Programs

It is desirable to have programs on the role of CSI in the construction industry and the accomplishments and goals of the Institute. For example, consider a "Technical Workshop" on the various certification programs.

VII.   Other Broad Topics

A.   Computer Applications to Communication Problems
B.   Theories of Communication
C.   Personnel Management
D.   A joint meeting of CSI, AIA, and AGC speakers to discuss goals and growth.
E.   Plan tour to manufacturing plants
F.   Social Activities (Programs for social events should not come under the jurisdiction of the program committee, except for coordination of dates)
G.   Personal Growth Topics. Although these programs should be limited, they do provide a service to members who are looking to become better informed. Such sessions can deal with personal financial planning, the economy, stock market, informational or trade agreements, or public affairs. They can foster development of such personal skills as time management, address health concerns, or help solve problems of family living. By creating a climate for individual growth, program planners can offer attendees information and skills which they sometimes lack the time to pursue on their own.
H.   Evolving Roles of the Four Teams in Construction Projects
I.   Evolving Impact of the Internet on the Construction Industry

CHAPTER PROGRAM PLANNING CHECKLIST

Program for Month of _____

Program Category _____

Scheduled Date   **Completed Date**

12 Weeks Prior to Chapter Meeting:

_____   _____ Select program topic

_____   _____ Select presentation method

_____   _____ Confirm meeting date

_____   _____ Confirm meeting site (if other than usual) _____

10 Weeks Prior to Chapter Meeting:

_____   _____ Invite program participants

_____   _____ Speaker 1. _____

_____   _____ Speaker 2. _____

_____   _____ Speaker 3. _____

_____   _____ Speaker 4. _____

_____   _____ Forward copy of program requirements

_____   _____ Forward details of meeting (exact time, place, etc.)

_____   _____ Request biographical sketch

_____   _____ Verify whether remuneration is expected

_____   _____ Offer assistance for reservations and travel arrangements

8 Weeks Prior to Chapter Meeting:

_____   _____ Confirm acceptance of program participants

_____   _____ Issue invitations to alternate participants (if necessary)

_____   _____ Confirm additional data with participants

_____   _____ Request list of program aids required

_____   _____ Request participants to submit program outline for approval
                                                     or submit preliminary program outline to participants

_____   _____ Notify publications committee to add participants to chapter
                                                     newsletter mailing list through month following chapter

meeting

6 Weeks Prior to Chapter Meeting

_____   _____ Prepare final program outline

                                      Distribute program outline to:

_____   _____   Participants

Scheduled Date	**Completed Date**	
		Chapter Board:
_____	_____	Approve program outline
_____	_____	Approve remuneration
		Hospitality Committee:
_____	_____	Participant desires to sponsor social hour
		House Committee (or Hospitality Committee):
_____	_____	Make reservations for: _____
		_____
		_____
_____	_____	Arrange travel for: _____
		_____
		_____
		Program aids required:
_____	_____	Projector Type: _____
_____	_____	Screen Size: _____
_____	_____	Markerboard
_____	_____	Rostrum
_____	_____	Sound System
		Membership Committee:
_____	_____	Supply of CSI materials for display at every meeting:
		Promotion Packets: _____
		Sponsor Campaign: _____
		Brochure: _____
		CSI Catalogs: _____
		Certification Brochures: _____
		Convention Information: _____
		Change of Address Form: _____

4 Weeks Prior to Chapter Meeting

_____	_____	Notify participants and other chapter committees if significant changes occur concerning subject matter or presentation
_____	_____	Confer with participants

At the Meeting

_____	_____	Verify presence of program reporter*
_____	_____	Verify that all special program aids are available and operational
_____	_____	Check arrangement of head table
_____	_____	Check distribution of evaluation forms
_____	_____	Verify that participants are being greeted and introduced
_____	_____	Confer with chapter presiding officer

1 Week After Chapter Meeting

_____	_____	Write thank you letters to participants
_____	_____	Summarize evaluation
_____	_____	Write program report (See **Appendix K** in the Education Guide)

*Submit newsletter article to chapter editor