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August's Program Managing Costs in a Period of Uncertainty

Increasing globalization of construction and recent turmoil in international financial markets are leading to increased risks in the construction market, including commodity price volatility, material and labor shortages, and quality assurance issues. Because of this, the construction market is facing new risks and unprecedented uncertainty in pricing and delivery.

This presentation will examine the current market forces and trends in escalation and financing and offer techniques for structured cost management through risk management and mitigation, including methods to facilitate communication within project teams to ensure project success.

Learning Objectives:

- Read and evaluate economic news and market forecasts critically
- Establish cost risk profiles for your projects
- Identify cost risk management concepts and procedures that you can apply to your own projects
- Re-evaluate past and pending cost risk management

decisions related to your own projects

 Make cost risk management an active and explicit part of your project management processes

Peter Morris, a Principal with Davis Langdon, has 33 years of experience in construction economics, cost planning and management, with expertise in building surveying, construction cost planning and estimating, auditing, scheduling and life-cycle costing. Peter has extensive experience in construction cost and sustainability research, and has authored papers on escalation, construction risk analysis, life cycle costing and sustainable design. He is currently chairing the research committee of the US Green Building Council to develop a national green building research agenda.

Peter has a Bachelor of Science in Building Surveying from Reading University in 1976, a CDip in Business Accounting and Finance, and is a member of the Royal Institution of Chartered Surveyors. He has spoken at several major conferences on the topics of escalation, benchmarking, cost planning, and the cost of sustainable design.

gratuity and tax.

Tuesday, August 4th.

phone: (408) 535-2935

email: krista@aba-arch.com

No host bar, dinner is \$32.00 including

Please make your reservations to Krista Nelson with choice of meal by noon on

When:	Thursday,	August	6th.	2009

LOCATION: Biltmore Hotel and Suites

2151 Laurelwood Road, Santa Clara (Montague Expressway & 101)

Times: Board Meeting: 5:00 p.m.

 Social Hour:
 6:00 p.m.

 Dinner:
 7:00 p.m.

 Program:
 8:00 p.m.

MENU: Tossed salad; double breast of chicken sautéed

and topped with mushroom marsala sauce with rice and vegetables; wine; dessert, coffee or tea.

OR

Tossed salad; slices of eggplant breaded and grilled topped with marinara sauce, mushrooms, parmesan cheese and garlic pasta.; wine; dessert, coffee or tea.

CONTINUING EDUCATION:

Cost:

RSVP:

This program meets CSI/ CEN and AIA/CES criteria. Participants will receive 0.1 hours of Continuing Education Units (CEUs) and 1 hour of LUS/ HSW (learning units).

Guests are welcome • No-shows will be billed



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PRESIDENT'S MESSAGE

BY HANNAH MOYER, CSI CDT AIA LEED

I was lucky this year to again attend CSI's National Convention in Indianapolis, Indiana, and learned a number of things about Institute goings-on, in addition to attending the wonderful seminars. I attended technical programs addressing sustainable concrete; a lot of leadership training programs; and a number of social events such as the Welcome Reception hosted by Grace Products, the ice cream social hosted by Stanley Hardware, and the Indians minor league baseball game hosted by CSI Indianapolis Chapter. All were worth-while events that I have come to look forward to year after year.

One of the leadership training sessions I attended was a three and a half hour seminar for incoming chapter Presidents and President-Elects, spear headed by Dennis Hall from the San Diego Chapter. A lot was reviewed and it will take some time to digest (all fifteen pages of notes), but I am comforted to know there is a great support group in our chapter's board and I have all the confidence I will not fail.

I also attended a number of discussions regarding the new 2009 Strategic Plan, which is up for Institute Board's approval in November. See Rietta McCain's article on the subject, which goes into greater detail. Comments from the members are being collected through the end of July, and I encourage all members to at least review it. The committee has worked on it with great thoroughness, and strives to make powerful changes for the benefit of as many members as possible. It is a short document and a must-read.

There is also a new guide in the works, called the Preliminary Project

Descriptions guide, for preparing schematic design written documents. The goal is to have a guide that is coordinated with the new version of UniFormat and to be able to integrate the written documents with BIM. The draft may be found under Standards & Formats on CSI Institute's web page. The guide will be available for general public review and comments will be collected through the end of July.

I was also fortunate enough to be invited by Michael Davis, the new Institute President, to sit in on a round table discussion held by the Emerging Professionals Practice Group. There were a lot of interesting points made, a number of which I believe our chapter may be able to address for our local college students and recent graduates.

In between the seminars and organized networking sessions I was also able to visit with old friends, and make some new ones. I shared meals with other West Region members, visited the Leadership Lounge, soaked up a good dose of CSI enthusiasm from Bryan Varner, and met some other first-time chapter presidents from around the country with whom I have started an informal virtual discussion group. We hope to keep in touch during the year, and not only provide encouragement and support for each other, but also exchange ideas and information on what our different chapters are doing.

Indianapolis was a delight, and very easy to get around in. The zoo was a pleasure, including the Conservatory in the adjacent gardens; where tropical butterflies were wistfully fluttering freely pass the visitors. A number of museums were within easy walking

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2009-2010 COMMITTEE CHAIRS

ANNUAL ROSTER

Chair Seat Open

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Robert Anderson, CSI, CCCA (808) 823-9353 webmaster@csiscv.org

PRESIDENT • from pg 2

distance, and my husband, Bob, was able to keep himself fairly busy. He even managed to win a Spouse's prize of Indiana memorabilia. How fun!

On a final and local chapter note, last night's dinner program, on the Fundamentals of ADA, was a resounding hit and proved to be a great draw with over 60 people attending. Taking advantage of advertising through AIA's statewide organization, California Council, along with our local AIA chapter, we were able to reach a broader circle of folks who were able to benefit from this program. Our very own Dawn Anderson, CSI, AIA, a California access specialist, and OSHPD / ICC certified inspector, did a stellar job with the presentation, and kept the audience engaged throughout the evening. Thanks again Dawn, for your tireless contributions for the benefit of the Santa Clara Valley Chapter. \bigcirc



Michelle Plotnik, Hannah Moyer, CSI, CDT, AIA, LEED, Kevin Norman, AIA, LEED and Dawn Anderson, CSI AIA at the July meeting

MINUTES OF THE BOARD MEETING

CSI, Santa Clara Valley (Draft, Board Approval Pending) Place: Biltmore Hotel, Santa Clara Date: July 9, 2009

Opening

The meeting was called to order by Chapter President Hannah Moyer at 5:02 p.m.

Attendees

Board Members

Hannah Moyer, CSI, CDT, AIA, LEED, President; Cindy Faust-Scholz, CSI, Treasurer; Maia Gendreau, AIA, CSI, CDT, Secretary; Jim O'Keefe, CSI, Immediate Past President; Rose Garrison, CSI, Industry Director; Joe Cota, CSI, Industry Director; Rietta McCain, CSI, CCCA, AIA, Professional Director; Kevin Norman, CSI, AIA, LEED, Professional Director

Region Director

Julie Brown, CSI, CCS, SCIP

Members

Dave Ingram, CSI

Minutes

The minutes of the June meeting were reviewed by those present. Minutes are approved as distributed.

Treasurer's Report

No report for this month. Albert and Cindy need to get together. June,

year-end report, and July report will be brought next month.

Region Director's Report

No Report

President's Report

Hannah took a CSI webinar yesterday, Institute will focus on certifications and guides this year.

Masterformat 1995 will be retired at the end of the year.

A limited 6 month free membership is being offered at Institute level to existing members who cannot pay dues. Determinations of eligibility are made on a case by case basis. Interested members should contact the Institute directly.

CSI webinars for committee chairs are anticipated to be offered in the future.

A webinar on chapter non-profit status will be offered.

Institute is drafting a new mission statement, anticipate simplifying it from the current mission statement.

There is a new award category, Excellence in Construction Information.

Unfinished Business

Discussion of possible sponsorship of Seismic Event with AIA. Kevin will talk with Gail Price. Advertising for this event has already started. A decision should be made prior to the next Board meeting.

Discussion of joining SF CSI on a 2011 conference. Jim will discuss with SF conference feasibility person. The Board feels responsibilities should be split 50/50 between the two chapters. Typically the region provides seed money, the rest of the funds are raised from sponsorship and registration. In 2001 SCV CSI combined the conference with SF. Typically it is a two year planning process. Jim will talk to SF and make an email report to the board.

By-laws: John McCaffery was sent the bylaws for review. Maia will follow up with him.

Comments on the Operating Guide: Maia and Rietta report that their comments were emailed to Krista.

New Business

CSI Institute strategic plan review: Hannah distributed copies of the draft of the strategic plan and comments will be received through the end of July.

50/50 member recruitment program: Institute is considering extending this reduced rate membership program through next year. To offer it to new members the Chapter needs an

MINUTES • cont'd on pg 5



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Julie K. Brown, CSI, CCS independent specifications consultant

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orientation program in place and the Chapter would be required to drop the chapter membership dues by half. Rietta will investigate getting a copy of an orientation program from another chapter. The Board briefly discusses enlarging the Membership committee to cover orientation.

Date for the Strategic Planning Meeting: a place and facilitator are needed for the Strategic

Planning meeting. Also at the meeting, the Chapter is scheduled to review the Outstanding Chapter

Commendation. Dave Ingram offered to facilitate, although he would like a new person to take this on. July 21 and Aug 11 are possible dates. Hannah will follow up with an email to let everyone know the meeting place and time.

Audit task team: Dave Ingram, Jim O'Keefe and Joe Cota are assigned the task team for the annual audit, which will likely take place in August and be reported to the board in September, due to the timing of the year-end report.

Committee Reports

Membership

Total of 92 members, 69 chapter members. There are 3 new members, but SCV is not the home chapter.

Educational Seminar

Maia has located a room and targeted October. Two months of advertising will be available if we are ready to go in a month.

Programs/Technical

Cost estimating, high performance coatings, etc are all coming up.

Continuing Education

Tonight and next month are registered for credits.

Greeter/Raffle

We have wine and tickets, also organizing tabs. We do not have the marbles tonight.

Annual Roster: No report

Editor

Deadline is tomorrow at noon. We need a photographer.

Historian: No report.

Awards

Awards will be given to the members that were not able to attend June's chapter meeting.

Website: No report

Operating/House: No report

Toys-for-Tots: No report

Marketing Committee

Four deposits for marketing are delivered to Cindy.

Operating Guide Task Team

No report.

50th Anniversary Task Team (2010)

Task Team is meeting tonight.

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PLANNING CALENDAR



CHAPTER MEETINGS

Aug 6

CONTROLLING

Costs

HIGH

SEPT 3

PERFORMANCE

COATINGS

Ост 1

TBD

PLAN AHEAD

West Region Conference:

"At the Crossroads" Sept 24 - 27, 2009 Berkeley, CA

CSI Annual Convention:

Construct 2010 May 11-14, 2010 Philadelphia, PA

Barbara Brosh

Project Manager Western Region

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West Region Corner



WEST REGION VICE PRESIDENT David Willis, CSI CDT (559) 896-1649 david.willis@paccoast.com

I would first like to thank you all, I think, for the honor of being your West Region Vice President for the coming year. I am not generally good at long speeches or articles but I will give it a concerted effort anyway.

The coming year will present challenges for everyone. I know I am not breaking new astounding news when I say the economy is in a little bit of a slump. In my travels to visit architects all over the northern part of the state I have seen offices humming with projects and others with many empty cubicles. I have to say, however, that no matter what the circumstance, everyone is very upbeat and positive that business is on the mend and they are all stepping up to do the tasks required to keep the doors open. For example, not long ago I arrived at an architect's office for a scheduled lunch and learn. I was met at the receptionist desk by the CFO of the company, answering the phones and greeting visitors. We do what we have to do, and it is really uplifting to see how everyone is stepping up to the plate to keep business moving.

I want to take a little time to encourage all chapter members, especially those of you on boards or committees, to attend the West Region Conference in Berkeley this fall. It is here that you really find out what CSI is all about. It is here that you learn about the inner working of your region. The education programs are always top notch, and we get to be a part of awarding those members that have gone above and beyond the call of duty.

For you industry members, please consider making an effort to participate in the Conference product shows, not only this year but those in the future. This is how the professionals learn what is new out there. Many good relationships have been formed with the networking achieved at these

pro fair opportunities. There are also many opportunities to provide sponsorships beyond the table top level. You won't know until you ask, and it doesn't hurt to ask.

Well, I will get off my soap box and ask you all to not hesitate to call me with any concerns you may have. I will be learning the ropes from Duane in the coming year, and if I do not have the answer, I will find out who does. The new governance is kicking in, and it will interesting to see how it goes in the coming year.

That is about it, so until the next time, keep the rubber side down and the shinny side up. ∇





ADVERTISE YOUR BUSINESS HERE

Have your company information in front of over 90 AEC industry members every month! Please contact Rietta McCain at 408-535-2962 or rietta@aba-arch.com if you are interested.

WHERE IS CSI GOING? A STRATEGIC PLANNING UPDATE

BY RIETTA McCAIN, CSI CCCA AIA

If you are like me, you do not have an abundance of free time to read every article in the myriad of professional publications that arrive in the mail each month, not to mention the blogs, tweets, and forum postings. I was not surprised to learn that I had missed out on several progress updates on the Institute's Strategic Planning efforts. It is worth being 'in the know' about the efforts this Task Team has undertaken, because this effort will be setting the course of the Institute for the next five years.

Thankfully, Eugene Valentine, FCSI, CCS, AIA and Chair of the Strategic Planning Task Team, provided an overview during the Annual Member Meeting at Construct 2009 of the work that has been done this year. Not only is it great to see such detailed and thoughtful work going into the development of the future of CSI, it is nice to understand the holistic approach the Task Team is taking in the Strategic Planning effort. The presentation was great for members like me who have not managed to keep up with all the goings on at the Institute level that are vital to the future of an organization that we care so much about.

Eugene shared the drafts of the proposed new vision and mission statements for CSI. Theses are the results of in-depth research and outreach within CSI's membership and the industry at large by the Task Team and its consultants. The hope is that these statements are more in alignment with what CSI is doing and wants to do in the industry now and in the years to come. The vision is thought to be what the Institute strives to be, while the mission is a statement about what CSI is doing.

Draft Vision:

Building excellence through documentation, education, and teamwork.

Draft Mission:

To advance construction documentation and educate building teams to improve project performance

The Strategic Planning Task Team has also identified several 'themes' that seek to outline the key components of CSI's vision and further expand upon what CSI seeks to do in a broad manner.

Communications Excellence:

CSI communications must help differentiate its value in a crowded environment. This theme includes a focus on generating two-way dialogue with members and stakeholders, as well as expansion into emerging communications tools and mediums. CSI will also seek to ensure that the role of each of its components (Institute, Regions, Chapters) is maximized in developing and delivering effective communications.

Building Team Diversity:

Collaboration and knowledge sharing across the building team is central to CSI's value proposition, helps define its brand, and is a critical strategic driver of its success. For maximum impact, CSI's strategic initiatives should leverage the diverse nature of its membership and reinforce its unique role at the center of commerce among members of the building information community.

Future of Project Documentation: Dramatic changes are at play in

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West Region Conference (2010/11)

As discussed above under Unfinished Business.

Announcements

Hannah will not be attending the September board meeting. The Board discussed changing the September meeting. The date will remain as planned, September 3.

Closing



INTERESTED IN PHOTOGRAPHY?

The Chapter is in need of a photographer! If you enjoy taking pictures and regularly attend our monthly meetings, why not lend a helping hand? Please contact Rietta McCain at 408-535-2962 or rietta@aba-arch.com if you are interested.

CSI TO END SUPPORT OF MASTERFORMAT 95 IN DECEMBER 2009

The CSI Board of Directors voted to stop licensing and supporting MasterFormat 95 during its June 16, 2009, meeting at the CSI Annual Convention in Indianapolis.

"Now that the new edition has been widely accepted by the industry, we felt it was time to complete the transition to MasterFormatTM 2004," said CSI Executive Director and CEO Walter Marlowe, P.E., CSI, CAE. "As a result, CSI and Construction Specifications Canada (CSC) will no longer support MasterFormat 95 after December 31, 2009."

In 2004, CSI and CSC introduced the most significant updates to MasterFormat since the standard was introduced in the 1960s. To meet the industry's changing needs, MasterFormat 2004 edition features an expanded structure, increasing the number of divisions from 16 to 50, and replaces the five-digit system from previous editions with a six-digit system. It was expanded to accommodate the many new technologies and building practices introduced since its inception and to provide more complete coverage for all types of construction projects.

MasterFormat has long been recognized as a standard in the construction industry to organize project manuals and detailed cost information, and to relate drawing notes to specifications. It aids project delivery by facilitating communication among architects, engineers, specifiers, contractors, suppliers and other consultants, which helps them meet building owners' requirements, timelines and budgets. By fostering fuller and more detailed construction specifications, MasterFormat is designed to reduce costly changes or

delays in projects due to incomplete, misplaced or missing information.

Many high-profile public agencies, companies, A/E firms, consultants and others have made the switch to the latest edition of MasterFormat, but there are still organizations that have not made the transition. Using two different versions of MasterFormat makes it difficult to correctly classify work results and communicate project information. The continued use of MasterFormat 95 and earlier versions also hinders industry standardization and works contrary to interoperability.

CSI and CSC are working with the MasterFormat Sponsors to communicate the decision to the industry, promote the benefits of using the latest version through a communication campaign and transition their products that use MasterFormat.

For more information on MasterFormat, please visit http://www.masterformat.com/. MasterFormat 2004 edition is available for purchase on the Web site. Access to real-time updates, a transition guide and a tool to convert MasterFormat 95 numbers to the latest version also are available. \bigcirc



STRATEGIC PLAN • from pg 7

the construction industry, including a transcendent shift in how information is compiled, managed and accessed. To ensure future relevance, CSI must become the go-to resource for knowledge and information on the future of project documentation.

At this point, if you are still reading this, you are likely overwhelmed with the information I have tried to pass on. It is exciting to plan for the future of an organization that so many of us dedicate our time and resources to. I want to make sure we all understand what is going in the Strategic Planning work that is setting the framework for the next five years of an organization that we are all a part of. My thanks go out to the members of the Task Team that have worked diligently over the past year and will continue to work on this effort.

There have been, and continue to be, numerous opportunities for comment and feedback. Please take some time to review the additional information available on the strategic planning effort at www. csinet.org under the membership section. \bigcirc

"All problems become smaller if you don't dodge them but confront them."

William F. Halsey

CSI AND BUILDING GREEN LAUNCH PILOT PROGRAM TO ENHANCE GREEN SPEC SUBMISSION PROCESS

CSI and BuildingGreen, LLC recently launched a trial program that allows manufacturers to suggest a product for listing in the GreenSpec® Directory via GreenFormatTM. For the test period, manufacturers that want to suggest a product for GreenSpec listing are guaranteed a review of their product by GreenSpec if they provide comprehensive information via GreenFormat.

GreenSpec was the first national online directory of green building products, and it is widely used today by building designers and product specifiers. Products for GreenSpec are selected by BuildingGreen's editors, based on their own research and analysis of products. GreenFormat is a web-based CSI format that allows manufacturers to self-report the sustainability properties of their products in a standard manner. CSI developed GreenFormat with support from the Charles Pankow Foundation and the assistance of BuildingGreen.

The two directories complement each other:

GreenFormat provides a uniform, organized structure for manufacturers to report the sustainable properties of their products. It offers professionals who make building product choices the information they need to assess products according to their projects' needs. (CSI neither evaluates nor endorses the products listed in GreenFormat.)

GreenSpec evaluates building products, selecting for inclusion those that meet key green criteria. Under this pilot program, GreenSpec will provide a link from an accepted product's listing in its directory to that product's listing in GreenFormat for those who need additional information. ∇



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Ron Ronconi, CSI, AIA, and Rose Garrison, CSI at the July meeting

PHOTOS FROM CONSTRUCT 2009 INDIANAPOLIS, INDIANA



Janet Piccola, FCSI of the Los Angles Chapter receiving her Fellowship from Institute President Gilman Hu, FCSI at the Honors and Awards Gala

Marilyn Smith, CSI, CCS of the Los Angeles Chapter receiving the Hans William Meier Award from Gilman Hu, FCSI at the Honors and Awards Gala





Rietta McCain, CSI, CCCA, AIA receiving the Continuing Publication Commendation from Insitute President Gilman Hu, FCSI at the Annual Meeting

Photos courtesy of Ralph Pitman, CSI, CDT, of the Indianapolis Chapter

WELCOME TO OUR NEW MEMBERS

Joseph Amaya, CSI Univ. of Southern California

Charles M. Salter, PE, CSI Charles M. Salter Associates

Ryan M. Whaley, CSI Student

Young Hun Bae, CSI DK Electric Inc.

Eric A. Midiere, CSI Minden Midiene Architects

Daniel S. Carlson, CSI Centria Architectural Systems

Patricia J. Muldoon, CSI Stepstone, Inc.

Benjamin Duterte, CSI Drywall Information Trust Fund

THANK YOU TO OUR RENEWING MEMBERS

Ron L. Bishop, CSI

Ronald D. Adams, CSI

John J. Miller Jr., CSI

William Buchholz, CSI, CCS, LEED, AIA

Fritz Swenson, CSI

Jeff Cremona, CSI

Sandra L. Black, CSI

Linda Poncini, CSI, LEED, AIA

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Great networking opportunity offering lunch, hands-on demonstrations, reference materials, resource lists, design tools and more!

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- Christopher Arnold, FAIA

Event Partner



Presenters:

Mary Lou Zoback, Seismologist Risk Management Solutions, VP

Jonathan Bray, Professor, UCB Civil & Environmental Engineering

Chris Poland, SE Senior Principal Degenkolb Engineers

Lindsey Maclise, PE, LEED APForell/Elsesser, Project Manager

Mary Comerio, Professor/Chair Department of Architecture, UCB

Charles Besjak, SE, PE, AIA Director Skidmore, Owings & Merrill

Bill Holmes, SE Principal Rutherford & Chekene

Bob Reitherman, Exec. Director CUREE~Consortium of Universities for Research in Earthquake Engineering

Chris Tokas, SE Supervisor
OSHPD Seismic Retrofit Program

Thalia Anagnos, Professor General Engineering, SJSU

Ronald Hamburger, SE Principal Simpson Gumpertz & Heger

Maryann Phipps, SE Principal ESTRUCTURE

Moderators:

Christopher Arnold, FAIA Principal Building Systems Development, Inc.

Richard Eisner, FAIA Gvmt. Liaison Fritz Institute

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