



## General Contractor Project Procurement

The Santa Clara Valley Chapter of The Construction Specifications Institute (CSI) would like to extend an invitation to you to join them on Thursday, August 5th, 2004 for dinner and to learn more about the General Contractor project procurement process.

Leslie "Les" Battersby will speak about the procurement of materials, equipment and subcontractors for construction projects. The discussion will include tactics used by the general contractor during buyout; the sneaky tricks that are sometimes used by general contractors, subcontractors, suppliers and manufacturers; and what the architect, specifier and engineers can do to help the owner get the project they are expecting. Les Battersby has been actively involved in the con-

struction industry for over twenty-two years. He has worked on projects throughout the United States and has experience in building, heavy highway and industrial construction. Additionally, Les has a B.S. and M.S. in Civil Engineering from San Jose State University. Les currently serves as Adjunct Professor of Civil Engineering at San Jose State University. Les has been published in the ASCE Journal of Construction Engineering and Management and presented a paper at the Construction Research Congress in March 2003.

AIA/CES Learning Units: This program meets AIA/CES criteria. Participants will receive 1 hour of LUS (learning units) which also applies to 1 HSW (Health, Safety Welfare) hour.

When: **THURSDAY, August 5, 2004**  
Location: Ramada Inn Silicon Valley, 1217 Wildwood Avenue, Sunnyvale  
(Lawrence Expressway and 101)  
Times: Social hour: 6:00 PM  
Dinner: 7:00 PM  
Program: 8:00 PM  
Dinner Cost: \$25 per person

RSVP: Please call Harry Hedges (408) 378-2762 or email [hharki@aol.com](mailto:hharki@aol.com).  
RESERVATIONS ARE REQUIRED \*\*\*\*\* Call prior to noon on Tuesday, August 3, 2004\*\*\*\*\*

## Benefits of Membership in CSI

- CEU's (LU's) earned by attending the monthly meetings and seminars
- Low cost insurance
- *Construction Specifier* magazine
- Knowledge and learning
- Networking with some of the most successful professionals in the industry
- Meeting local people

## President's Message *by Dave Ingram*

### 2003-2004 Board of Directors

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#### Value.

#### Membership responsibility.

#### Opportunities.

#### Fun.

These are topics you will be hearing from me during the coming year as the 2004/05 board continues to build upon the solid foundation left through the leadership of Jim Balboni and the previous board members.

Have you had the feeling that something seems to be missing for you in chapter activities but you have trouble in ascertaining what it is? Though you still have fun at the chapter meetings, is the overall chapter experience satisfying?

Are the monthly program meetings providing value for you? Are the various committees and their activities providing value? What relevance does the West Region Board and Committee activities have for you the individual member, or do you even know what they provide? For that matter what about the Institute and its activities?

There are varying levels of needs and expectations depending upon each member's individual perceptions and experiences. Just what are the needs of a member who is new to the construction and specification industry compared to that of experienced members who have been coming to chapter programs, seminars, etc. for many years?

"I miss the good old days, we used to —". Just what activities from the good old days were of value to you then and what happened to those activities if they no longer exist or no longer satisfy? What activities are missing that relate to current concerns of the day and future?

In my discussions with you the membership and various Board Members there seems a need to address these issues. With your input and the leadership of the Board and committee members, I am confident we will continue in a positive and productive manner improving chapter activities for all of our members and adding to the fun.

A new Marketing Committee has been formed. The Committee's primary function is to provide opportunities and coordination to companies and individuals who would like to place advertisements in our roster, newsletter, web site and also offering sponsorships of any other special events or activities the Chapter has to offer. The committee is currently comprised of Ron Adams, Dave Ingram and Marvin Bamburg. The committee will be sending out invitations for roster and newsletter advertisements this month. Please email any current inquiries to [daveingram@sbcglobal.net](mailto:daveingram@sbcglobal.net) or phone (415-672-4342).

**President** *continued on Page 5*

## SUMMARY

### New Leaders:

Let CSI Institute help you do your job! Get the tools you need to be successful from CSINet ([www.csinet.org](http://www.csinet.org)). At CSINet, you can read and download the Administrative References, register for programs and events, talk to others in CSINet's Communities, get the latest professional development and certification information, download membership recruitment materials, and access the Chapter Leader's Toolbox!

Look for the July issue of CSI Leader at [www.csinet.org/theleader](http://www.csinet.org/theleader) after mid-July. This issue focuses on how leaders – including those in certification and education – can make the most of CSINet.



### WORDS YOU MAY HAVE FORGOTTEN

By Julie K. Brown

**draggle** (*DRAG-uhl*); *verb.*

1. To become dirty by being dragged.
2. To trail or follow.

**orotund** (*OR-uh-tund*); *adj.*

1. Strong, clear, rich (as in voice or speech).
2. Pompous, bombastic.

**tsuris** (*TSOOR-is*); *noun, also tsouris.*

1. Trouble; aggravation; woe.

**kvell** (*kvel*); *verb.*

1. To feel proud; to beam; to gloat.

**schmaltz** (*shmahlts*); *noun, also schmalz.*

1. Exaggerated sentimentality, especially in art, music, movies, etc.
2. Fat or grease, especially chicken fat

**trunnel** (*TRUN-l*); *noun.*

1. Treenail, a wooden peg that swells when wet, used for fastening timbers, especially in shipbuilding.

### 2004-2005 Committee Chairs

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#### Jim Balboni

Project Executive  
New Equipment  
Western Region



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OtisLine 24 Hours: 1-800-ADD-OTIS

## Minutes of the Board Meeting

CSI, Santa Clara Valley Chapter  
(Draft, Board Approval Pending)  
PLACE: Ramada Inn, Sunnyvale  
DATE: July 01, 2004  
TIME: 5:00 PM  
PRESENT: Hannah Moyer,  
Julie Brown, Dave Ingram,  
Marvin Bamburg, Mike  
O'Donnell, Ron Ronconi,  
Gus Sharvey

**1. Meeting was called to order by Dave Ingram.**

**2. Minutes from last meeting were accepted.**

- a. Treasurer's Report was distributed by Marvin.
- b. Bank signature sheets were updated, and disposition of accounts discussed. 2003/2004 budget had a surplus.
- c. The Treasurer's Report was approved by the Board.

**3. Regional Director's Report:**  
No report.

**4. President's Report:**  
No report.

**5. Unfinished Business:** None.

**6. New Business:**

- a. Marvin presented 2004/2005 budget. Educational and Certification seminars will be combined. Newsletter Ad income will be revised.
- b. Strategic Planning date: This was deferred to next month's Board meeting.

**7. Committee Reports:**

- a. Golf Tournament Committee: Mike described the program. 2-person committee will meet next week. They are working on acquiring a winner's award; something like a week in Las Vegas. 3 parties so far to do table-top presentations. New date and fee will be put in Newsletter, website and mailed.
- b. Educational Seminar Committee: Hannah reported that a half-day seminar will be set up for November 2004.
- c. Marketing: Dave stated that this will be in 8 1/2 x 11 format.
- d. Operating/House: Dinner reservations will be announced to be due by the preceding Tuesday. Too many late reservations coming in.

**8. Announcements:** None.

**9. Meeting was adjourned 6:00 PM.**

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### Houston Apartment Developer Recoups Utility Expenses, Cuts Water Use by 50%

San Diego, Calif., June 7, 2004—Wellspring International Inc., provider of wireless, point-of-use utility submeters for all build-

ing types, today celebrated the six-month mark of its installation at Sowell Group's "Green Oaks" apartment complex outside of Houston, TX. Sowell's Green Oaks community was the first in its 6,000-unit portfolio to give Wellspring's Aqura submetering system a try. (Submetering is the practice of billing apartment residents for utilities at a rate proportional to usage. As a result, the rents owners charge can remain competitive, while covering rising utility costs and encouraging conservation).

"We couldn't be happier with Wellspring's solution - it's definitely for real," said Bill Murphy, executive vice president and CFO, Sowell Group. "Since installation, our baseline utility consumption has dropped almost 50% at Green Oaks. Wellspring's performance exceeded even its own projections. The product pays for itself and then some."

Wellspring's Aqura system wirelessly monitors, records and displays consumption data within any multifamily residential unit – regardless of age, type or plumbing configuration. Consumption readings and leak diagnostics are collected and uploaded through a parallel system to Wellspring's data and billing center several times per day, and made available on the Internet to both landlord and resident. For more information, visit <http://www.wellspringwireless.com>.

## SUMMARY

### 2004 WEST REGION CONFERENCE, SAN DIEGO

SEPT. 30 - OCT. 3

#### San Diego Chapter's 50th Anniversary

The San Diego Chapter will host this year's conference at the tropically plush Catamaran Resort Hotel on beautiful Mission Bay.

Products Show Booths and Tabletops Available – Space is Limited.

Contact Gina Adams at RCP Block & Brick for additional information: Phone 877.401.6733 or email [gadams@rcpblock.com](mailto:gadams@rcpblock.com) or visit the San Diego website at <http://www.sandiegocsi.org>.

#### President *continued from Page 2*

Committee participation is paramount for the success of the chapter. Please refer to the committee chair list and contact any of the chairs to participate.

Our programs chairs, Krista Nelson, Hannah Moyer are open to program ideas for the

coming year and invite any chapter members who would like to be on the committee.

I shall also be commenting on efforts and help you can give to the other committees in future messages.

I will be phoning all of you over the year seeking your advice and participation in chapter activities. After our next Strategic Planning meeting and each committee has developed a list of task needing to be done, I will ask each of you for a small amount of your personal time for a single task for the year. Past Presidents be forewarned, I shall be calling you for your sage opinions and participation.

Value. Membership responsibility. Opportunities. Fun - especially fun. With your help and leadership from the Board, I have no doubt that the coming year will be exciting and full of continued chapter successes.



### Planning Calendar 2004 - 2005

#### Chapter Meetings

**August 5** - General Contracting Procurement

**September 2** - TBD

**October 7** - Manufacturer Reps – What Can They Do For You?

**Golf Tournament** - Look for the new date to be published soon.

#### Other Important Dates

**July 29:** Final Registration Deadline Certification Exams (WE Region Conference, San Diego, CA)

**September 29:** Certification Exams (WE Region Conference, San Diego, CA)

**October 27-29:** 6th Annual Product Representative Academy; [www.csinet.org/prainfo](http://www.csinet.org/prainfo). Registration opens in July!

**April 20-22, 2005:** The 49th Annual CSI Show & Convention; [www.theccshow.com](http://www.theccshow.com).

Visit our website at  
[www.csiscv.org](http://www.csiscv.org) or

The West Region's website at  
[www.westregioncsi.org](http://www.westregioncsi.org)



- Product Specifications
- Job Site Inspections
- Presentations



#### Dave Ingram, CSI

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## West Region Report

### Report on the Institute Board of Directors Meeting

June 19, 2004, Alexandria, VA

By Ed Buch, CSI, CCS, AIA and Paulette Salisbury, FCSI, CDT

The West Region was represented by John McCaffrey, Ed Buch and Paulette Salisbury at the day long Institute Board of Directors meeting on Saturday, June 19, 2004 in Alexandria, Virginia. In addition to the Directors, dedicated members of the West serving on the Institute Board as Vice Presidents were Barbara Richardson and Valarie Harris. Twenty eight of the twenty-nine members of the Board were present along with newly elected members, officers, and the Institute staff. In addition to routine reports the following items of interest were discussed:

1.) The certification exams, (CDT, CCS, CCCA, & CCPR), offered next year will be based on the principals presented in the old Manual of Practice, (MOP), along with the revised Divisions in the new MasterFormat 2004. The MOP will only be available for purchase by people registered to take the exam in 2004. The new Project Resource Manual, (PRM), and the new MF 2004 will be the basis for the new exams. However, the exams given next year will not contain questions on the new chapters included in the PRM. Studying from either the old MOP or

the new PRM will adequately prepare candidates to pass the certification exams given this year and next.

2.) The present Environmental Task Team will be disbanded and will be reestablished when a more clearly defined purpose has been identified.

The majority of the day was taken by discussion of several motions before the Board. Most of these were of a routine nature intended to streamline or clarify Institute Administrative matters. The following motions will be of interest to West Region members:

1.) The annual report of the

Finance Committee was ratified. It was a difficult year financially for the Institute with a small net loss expected at year's end on June 30th. This loss is a result of two principal income sources falling below expectation. Income from both membership dues and exhibit sales at the Convention in April were below budget. On the positive side, the Institute has ample cash reserves to cover this year's shortfall.

2.) The Financial Plan for the next three years was approved. The Institute's leadership has

**West Region** *cont'd on Page 8*

## The Big Picture: MasterFormat and OCCS

This six-part series, which first appeared in 2001, looks at MasterFormat organization, OmniClass (then known as the Overall Construction Classification System, or OCCS), MasterFormat Level 4 identifiers, the need for unique section numbers and titles, expansion of MasterFormat, organizational systems for construction products and practices, and how MasterFormat might be used as a table in OmniClass.

### Part 3

Ideally, revision of MasterFormat would satisfy several needs. It would provide the needed space for information aggregators, such as Architects' First Source and Sweets, to assign unique numbers to more product types; it would establish a system to allow unique identifiers not only for types of products, but for each product of each type; it would require few changes to existing numbers; and it would be adaptable to higher-level organizations such as the Overall Construction Classification System. Now that's a tall order!

**MasterFormat** *cont'd on Page 7*

## SUMMARY

### MasterFormat *cont'd from Page 6*

An obvious way to provide more numbers for more product types is to simply add a digit. Each Level 3 classification would immediately have ten times as many numbers in Level 4, and specifier and manufacturer alike would easily recognize the new numbers. If Section 08210 became Section 082100, we would have little difficulty using old literature until the new numbers were all in place.

Similarly, one might add decimal numbers, or alpha characters could be incorporated. Alpha characters are particularly attractive as they provide twenty-six choices at each level rather than ten. Mixed alphanumeric numbers may also be easier to read. For example, 08213B3 is less likely to be misinterpreted than 0821323; the non-numeric character provides a convenient break in the string of digits.

However, adding a single character is a short-term solution. It may provide enough additional Level 4 numbers for now, but it isn't hard to imagine a time in the not-too-distant future when the same problem comes up again. If we're going to change, let's try to create a system that has a lot of room for future expansion. Remember, an important goal is to end up with identifiers that are unique to every product available.

To satisfy that need, we need to go beyond Level 4. Consider a numbering system that simply added two alpha characters to the

existing five digits. This would increase the number of possible unique product types by a factor of 676 (twenty-six times twenty-six). This is a fairly large number, perhaps even large enough for the number of product types needed for several years. It is not adequate, however, to assign a unique identifier to every variation of every product.

Using wood doors as an example, a given manufacturer might produce both five-ply and seven-ply doors, with five options for wood species, two veneer slicing options, two matching patterns, five factory finishes, four widths, three heights, two thicknesses, four glazing sizes, two glazing trims, and four fire-resistant classifications. To assign a unique number to each possible combination would require over 150,000 numbers. If we want to continue using the number 0821 to identify wood doors, we end up with a very long number.

"Whoa! Why would I want to use all of those numbers? And how would I remember what they mean?" Well, you wouldn't want to use ten-digit numbers, and you couldn't remember what they mean. But - your computer can!

Visit the CSI website at [www.CSINet.org/](http://www.CSINet.org/) for the latest information on MasterFormat, and [www.OCCSNet.org/](http://www.OCCSNet.org/) for the latest on OCCS.

© 2002 Sheldon Wolfe, RA, FCSI, CCS, CCCA, [swolfe@bwbr.com](mailto:swolfe@bwbr.com) on the web at [www.CSI-MSP.org](http://www.CSI-MSP.org)

### Sales Representative Architectural Sales

#### Challenging opportunity for Architectural Technical Services Rep

to develop product specifications with consultants, architects and designers for our paint and coatings products in the San Francisco Bay area.

Must have previous recent experience in architectural or outside sales with a construction-related product.

Ability to track commercial projects throughout the bidding process is an integral part of this position.

Requires experience in making professional presentations to large groups, excellent interpersonal, written and verbal communications skills.

Valid driver's license, good driving record, and ability to travel and attend evening meetings required.

Email your resume to [mbrower@frazee.com](mailto:mbrower@frazee.com), fax to (323) 883-0275, or mail to: Human Resources, 6625 Miramar Road, San Diego, CA 92121 EOE. FRAZEE PAINT

## Equity Office Awards Northern Power Systems Combined Heat And Power System Project

San Francisco -- May 20, 2004  
-- Equity Office (EOP) (<http://www.equityoffice.com>), the nation's largest publicly held office building owner and manager, has selected Northern Power Systems (<http://www.northernpower.com>), a subsidiary of Distributed Energy Systems Corp., to design, engineer and build a turnkey, grid-connected on-site combined heat and power (CHP) system at EOP's 201 Mission Street office building. The new CHP system will meet a significant portion of 201 Mission Street's electricity demand, and will be fully interconnected to and operate in parallel with the Pacific Gas & Electric (PG&E) utility downtown network grid.

Designed to deliver improved energy efficiency and qualify the office building for California's Self-Generation Incentive Rebate, the 750 kW system features two Waukesha 375 kW natural gas-fired engine generator sets that will feed two of the building's three electrical services. Waste heat from the engines and exhausts will be used to produce hot water for the building's heating system. The new system is expected to deliver approximately 40% of the building's

annual electricity and 90% of its annual steam demand. In recovering waste heat from the engines and exhausts, the system's overall fuel efficiency increases to approximately 80% (lower heating value), compared to typical industry efficiencies of 40% (lower heating value) from utility produced power, qualifying it as a "green" system. This dramatically increased fuel efficiency reduces greenhouse gas emissions by up to 40%.

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### West Region *cont'd from Page 6*

made realistic projections of income and expenses. Several significant actions have either been taken, or are being planned, to reduce Institute expenses. Forecast income from Convention booth rentals has been increased slightly and a professional event sales organization, CMG, has been retained to insure that this goal is met.

- 3.) The updated Strategic Plan was adopted.
- 4.) Changes proposed to Institute and Region governance were defeated. A new governance task team was established to examine these issues again. They will have a preliminary report at the October Board meeting.
- 5.) Task teams were established to update Page Format, Section Format and Terminology documents.

Past President and current Board Advisor, Phil McDade was

thanked for his contribution to the Institute this past year. On behalf of the Board, he presented to outgoing President Edith Washington a small gift to recognize her service during the year.

Thursday and Friday preceding the Board meeting were taken up with new Board members orientation. As a part of this we visited the Institute headquarters offices, overlooking the Potomac River in Alexandria. The staff totals 37 people. Based on first impressions and their presentations to us we can say without hesitation the membership is being well served by a small, talented, experienced, and hard working group that has the best interest of CSI clearly in view. They are working under severe financial limitations and delivering more services to us with fewer resources than they have had in the past.

A new award has been established by the Institute this year, the Michelangelo Buonarroti Award. This is to recognize an individual for a lifetime of distinguished service to building design and construction. Nominations are due by December 1, 2004. For more details on the award criteria, your chapter should have the award announcement on hand.

Institute staff reported that comments from attendees at the Convention in April were far more positive this year than last. This is despite lower attendance. Registration totaled about 5,000

**West Region *cont'd on Page 9***

## SUMMARY

### West Region *cont'd from Page 8*

this year compared with over 7,000 last year. Booth sales also decreased this year. To improve attendance next year, high quality educational sessions will be emphasized. As noted above, to improve booth sales an outside firm specializing in convention exhibit sales has been hired. The principal factor affecting both attendance and booth sales this year was thought to be the fact that the AIA convention was also located in Chicago and followed ours by only six weeks. Since the AIA Convention will be in Las Vegas next year, it's expected this will not be such a negative factor again.

During the three days of meetings and informal forum, additional issues were discussed:

1. Members were encouraged to register for CSI U in San Antonio. The West has about 25 people signed up to participate.
2. Chapters will be encouraged to support National Engineers Week rather than having promotion and support directed from the Institute. It is felt that local support is most effective.
3. A Task Team will be appointed to develop a plan for corporate sponsorship as an underwriter of key CSI events.
4. In 1999 CSI changed the name of the Education and Certification Dept. to the Professional Development Dept. The new direction of this committee is to create programs and services to enhance the exchange

of knowledge. At this meeting we agreed to modify our policy to replace the word "Education" with "Professional Development". Chapters and Regions may wish to do the same so as to reduce redundancy of programs and services, but are not required to do so.

5. The schedule of CSI Show and Convention site was announced. Members will take note of the response to their concerns regarding travel and financial issues. (See calendar below.)

Chapter and Region Leaders will want to make note of these dates so that budgeting of resources can be done effectively.

6. The West is well represented on Committees this year. Some of our best and brightest will be serving to improve the programs of our organization. Nominating, Jack Klemeyer, Technical, Henry Berg, Membership, Bryan Varner, Academic Affairs, Matthew Boomhower and Valarie Harris, Awards, Barbara Richardson and Jan Piccola, Certification, Bill Buchholz. Institute

Task Team members will be announced soon.

Additional information on these and other initiatives from Institute will be reported in future articles from the Directors. The leadership of CSI is fully energized and capable of making decisions affecting all members. 2005 will be a banner year for our organization reinforcing pride in membership and a bright future for CSI.



### 2005

CSI Show & Convention  
CSI U

April in Chicago  
July in Snowbird, Utah

### 2006

CSI Show & Convention  
CSI U

April in Las Vegas  
April in Las Vegas

### 2007

CSI Show & Convention  
CSI U

June in Washington DC (Tentatively)  
June in Washington DC (Tentatively)