

NEWSLETTER

"2024 Great Lakes Region Conference - Indianapolis"

It was good to see those of you who attended our regional conference in Indianapolis last month. The Bottleworks Hotel was a great place for our event. If you are ever in Indy, be sure to check it out and the adjacent "Garage" food court. Here's a brief recap of the event for those of you who were unable to attend.

Thursday, April 11th – We joined the Indianapolis Chapter for their monthly meeting. The presentation for the evening was "Unitized Curtain Wall: From Specification to Verification on the New IU Health Downtown Hospital". This was a great program on the design and testing of the custom curtain wall system being installed at the new IU Health Downtown Hospital. This was a treat for designers, specifiers, and geeks as we were walked through the construction and testing of a 20'x30' mockup of the curtain wall.

Friday, April 12th – After breakfast, we had six (6) great CEU sessions. At lunch, we had a presentation of the renovation of the Bottleworks Hotel, associated buildings, and the surrounding Bottleworks District. The hotel and adjacent "Garage" were originally a beautiful Coca-Cola bottling plant and landmark along the north end of Massachusetts Avenue. We were shown the considerations and process of the restoration of the terra cotta façade, windows, terrazzo, tile, bronze and stone, the new rooftop addition, and the new two-story open courtyard. Our afternoon was filled with six (6) great leadership sessions. After that we gathered for dinner and our Regional Awards program, where we recognized the service of our regional leadership and special recognitions of members of our region. This year I was honored to be the recipient of the Bud Reed Memorial Award. Our evening ended with drinks and conversation at the Sundry and Vice Lounge.

Saturday, April 13th – After breakfast we held our Regional Annual Meeting, where we covered our current financial, membership, Institute, and President's reports. We concluded our meeting with Chapter reports. I always enjoy hearing about the activities and accomplishments of each of our outstanding Chapters. You all are doing a great job!

This year we had an attendance of about 40 and were represented by 5 of our 9 chapters. I find this a little disappointing as just a few years ago we had nearly 90 attending our regional conference in Cincinnati. I will be working with the Michigan region which will be hosting next year's conference. I would be interested in any recommendations in programming that would increase our attendance and chapter representation.

Thanks again to the Indianapolis Chapter for hosting the 2024 Great Lakes Region Conference, for all our presenters, and a special thanks to sponsors. I look forward to seeing everyone in Michigan at our 2025 CSI Great Lakes Region Conference.



GREGGALANJONES

Gregg Jones, AIA CSI CDT CCS
Region President FY2024
CSI Great Lakes Region
gjones@abonmarche.com

NEWSLETTER

CSI Great Lakes Region Members -

Had a great time seeing everyone from around the Great Lakes Region last month in Indianapolis for the CSI GLR Conference. Everything from the venue to the speakers to the meals was great. BIG thank you to the CSI Indianapolis Chapter.

The next CSI Institute Board meeting will be in Houston, TX on June 14-15, 2024. Please let me know if you have any questions or would like me to voice any concerns.

The next Master Specifier's Retreat (MSR) is on July 10-12, 2024 at the Seabird Resort, Oceanside, CA. Application is available if you are interested. Please see CSI website for additional information. This is an opportunity to meet with senior product representatives who provide detailed information on building products. There are also education sessions focused on improving your practice and invaluable networking opportunities to grow your professional circle.

This year's CSI National Conference will be held in Houston, Texas on October 16-18, 2024. Registration is open. Don't forget to submit for National Awards, especially Outstanding Chapter Commendations. Hoping to see you there!

Watch your email for Webreach Wednesday presentations. Earn Learning Units. Also, join in on Tech Talk Tuesdays. Go to the CSI Website to see the schedule. Also check out the CSI Learning Library for other courses offering Learning Units. There is a wealth of information and learning opportunities.

There are many resources available to chapters and regions on the chapter and region community at CSlresources.org.

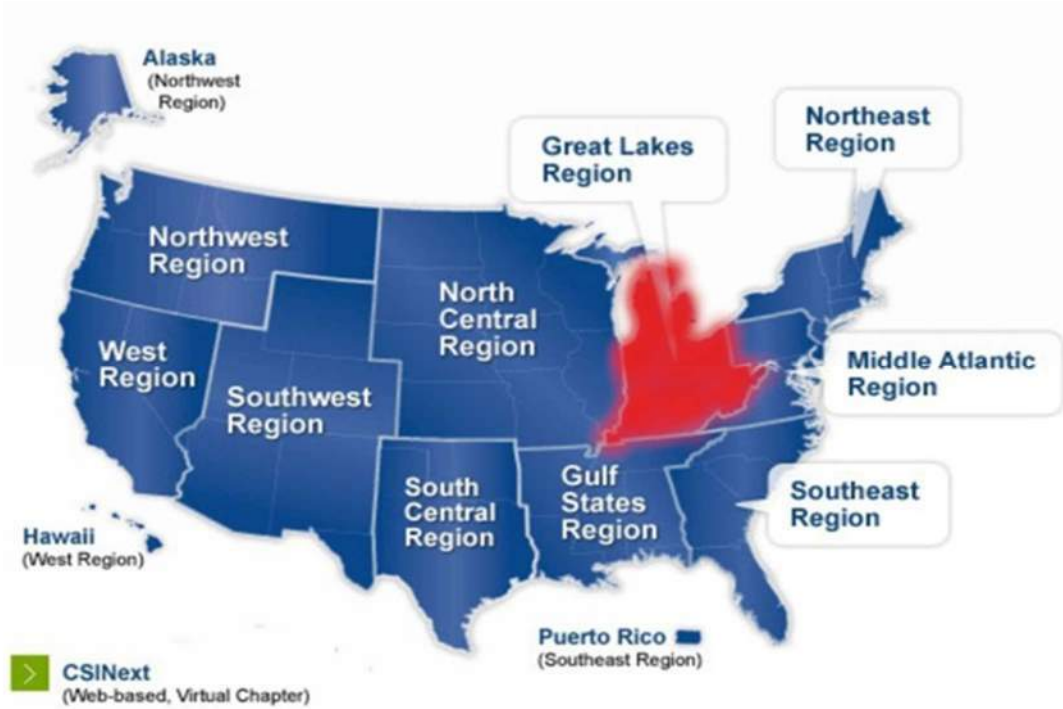
I want to direct you especially to Membership Recruitment: at <https://www.csiresources.org/chapterregionleaders/member-management/membership-recruitment>

Please reach out if you have anything CSI you want to discuss.



Ivette Ramirez Bruns CSI CCS CDT
Director from the Great Lakes Region
ibruns@ratiodesign.com

NEWSLETTER



CHAPTERS

- Akron-Canton**
- Cincinnati**
- Cleveland**
- CSI Next**
- Evansville**
- Grand Rapids**
- Indianapolis**
- Lansing**
- Louisville**
- Metro Detroit**

Our Mission

To advance building information management and education of

project teams to improve facility performance.

[Home - Great Lakes Region \(csiresources.org\)](http://csiresources.org)

* PDPG – Third Edition

ANSWERS: 1. – d [PDPG, 3.1.6*]; 2. – e [PDPG 2.2.7.3*]; 3. – b [PDPG 6.2.2.1*]; 4. – d [PDPG 3.1.2.3*]; 5. – a [PDPG 3.1.6.3*] (December 2022, *The GLR Newsletter* Electronic)

CERTIFICATION QUIZ ANSWERS

NEWSLETTER

Here are **some of the things your Region and Region Officers do** better as part of the Construction Specifications Institution Structure:

Leadership Training If you've ever thought about applying for a Chapter Leadership position, it's as simple as looking [here](#) to see what kind of things are expected.

Programs Bureau- Programs Chairs have a place to go to fill up a hole or two in the annual calendar. If you see a monthly program that stands out, please pass those thoughts on to Jack Morgan, who oversees the submissions. Visit the Speakers Bureau [here](#).

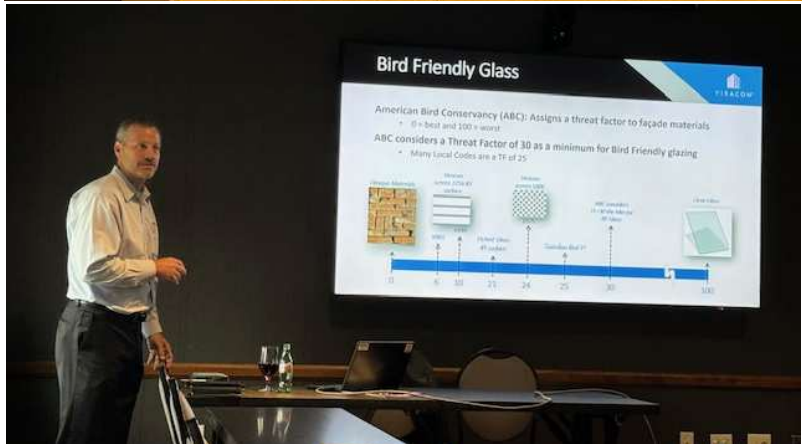
Awards- The format and organization of our Awards program is very robust and well thought out. It has been seen by other regions and used as a template for the creation of their awards programs. Please review it [here](#) to see how to reward active leaders in your chapter. Gregg Jones (Grand Rapids) and Jack Morgan (Indianapolis) are the current Awards Committee Co-Chairs.

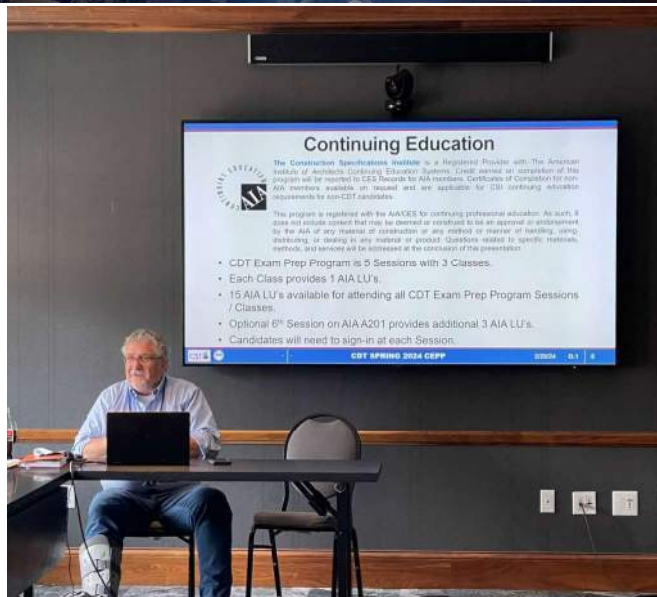
Chapter Challenge- Introduced in 2018. It is a way to introduce your friends and colleagues to CSI. More on this on page 3 of this newsletter.

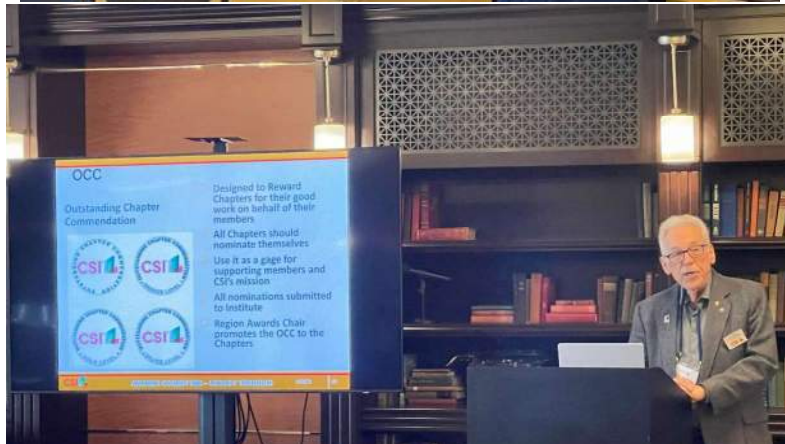
Member Relief Program- Introduced December 2020, still in effect. Details and information [here](#).

NEWSLETTER

- National Conference, October 16-18, 2024, Houston Texas.
Register and Plan Now! [2024 National Conference](#)
- Region Conference Master Planning Schedule is being revisited for updates.
- Kicking around the Idea for a Bi-Region Conference. Stay tuned.
- Let us know if there is something you want to share about your Chapter [here](#)
- Officer and Committee Training available.
- The Region needs YOU for the following OPEN POSITIONS:
 - President Elect – Interested?
 - Vice President 2 – Interested?
 - Treasurer – Interested?
- End of Fiscal/Chapter Year 30-June 2024.
- New Fiscal Year Begins July 1, 2024.
- IRS Form 990 Due - most chapters and regions November 15.
- Begin Recruiting Officer and Leaders for Next Fiscal Year January 15.
- Officer and Leader Roster Report Due *Must be submitted even if roster remains same 31-May 2024.
- Share your CSI Master Specifiers Retreat (MSR) experience for the newsletter [here](#)
- Share your Certification Exam experience that you would like to share [here](#)
- Share your CSI 2024 Region Conference experience for Newsletter [here](#)
- Share your Spec-related photos with message for the Newsletter [here](#)
- Outstanding Chapter Commendation nomination due, July 2024.
- 2025 GLR Region Conference, Michigan. Stay tuned.

















CSI Michigan – See you Next Year 2025!



INDIANAPOLIS REGION CONFERENCE
APRIL • 11-13 • 2024

BIG THANK YOU
ALL FOR MAKING
THE CONFERENCE
A SUCCESS!

EVENT
SPONSORS



BAINES GROUP INC.



DURO-LAST®

THE WORLD'S BEST ROOF®

MEAL SPONSOR



TABLE TOP SPONSORS

ASSA ABLOY
Opening Solutions



THURSDAY - LUNCHEON



Zach Hilleson, Senior Associate at **RATIO Design** is a member of the Shell Team on the IU Health downtown hospital for **CURIS Design** – a collaboration design team.



Ken Roko is the Associate Principal and Senior Technical Director in the Building Enclosure Group at **RWDI**. He is a consultant for the new IU Health downtown hospital.

FRIDAY - MORNING SESSIONS



Robert A. Miller, based in Detroit, Michigan, works at **Imperial Professional Consulting Services**, specializing in Perimeter Security. He assesses site vulnerability and recommends appropriate products and solutions.



Kaden Stinger, Architectural Engagement Specialist at **Special-Lite, Inc.** Resides in Polson, Montana, and is a skilled construction and building material professional.

FRIDAY – MORNING SESSIONS



Mark Ogg, MCM PMP, CCA, CSI is a Senior Manager of Projects/Corporate Solutions for JLL. Mark's experience within the construction industry spans Consumer Goods, Manufacturing, Industrial, and Commercial markets.



Jeff Sweet, an Architectural Sales Representative with Viracon, has specialized in glass for over 35 years. He covers Indiana, Ohio, Kentucky, and Pittsburgh, working with architects, developers, and glazing contractors to provide glass solutions.



Larry Podojil, a member of CSI Indianapolis and is a principal of Duro-Last Inc, a subsidiary of the Holcim Group. With a focus on the roofing industry since 2010.

FRIDAY- LUNCHEON



Jeff Milliken, AIA, LEED AP, is a Principal at RATIO Design, involved in creating design visions for various projects nationwide. He is leading the design for the new IU Health AAHC Hospital and has designed the Bottleworks Hotel.



David Kroll, AIA, Director Of Preservation at RATIO Design. Has a passion for the preservation of history through built design. He is driven by forensics-style work that helps to preserve history.

FRIDAY - AFTERNOON SESSIONS



Jack Morgan, AIA, FCSI, CCS, CCCA is an active member of the Indianapolis CSI Chapter and Great Lakes Region Director. Jack specializes in Architecture and Specifications.



David Proudfit, CSI is a member of the Cincinnati Chapter serving numerous roles there and within the Great Lakes Region. David is also a Fellow of the Institute.

FRIDAY - AFTERNOON



Ken Schmidt, CSI is a member of the Indianapolis Chapter. He has served numerous roles in Indy and the Great Lakes Region. Professionally he is the Owner of Seward Associates.



Tony Julian, CCA, CCS, CDT, QCP is the active President for the Indianapolis Chapter of CSI. Professionally he is an Engineering Construction Manager for Circle Design Group.



Gregg Jones, AIA, CSI, CDT, CCS is a member of the Grand Rapids Chapter of CSI. Professionally he is a senior Project Architect for Abonmarche.

NEWSLETTER

The CHAPTER CHALLENGE, which began in 2018, is still in full effect.

The purpose of this CHALLENGE is to increase membership. In this CHAPTER CHALLENGE, the Chapter members must recruit new members with no cost to the new member. The Chapter will pay for the first year's chapter dues, and the Region will pay for the first year's Institute dues. This is for PROFESSIONAL and EMERGING PROFESSIONAL members only (renewals and industry members are not included).

Your involvement does not stop there! Once the new members attend their first Chapter meeting, the Chapter has to engage those new members, embrace them by making them a part of the Chapter, getting them involved, and giving them a sense of belonging.

Who can you recommend today?

If you have any questions or need any other information, please contact one of the following:

Great Lakes Region Chapter Challenge Advisor

Ken Schmidt – Operations Manager Seward Associates

317-979-1700

kschmidt@sewardassociates.net

Great Lakes Region Membership Chair

Blair Reese 313-269-3868

breese@ghafari.com

Form(s) attached



Construction Specifications Institute Great Lakes Region

“CHAPTER CHALLENGE”

What is CHAPTER CHALLENGE?

- Chapter Challenge is a way to allow Design and Construction Professionals the opportunity to experience CSI for one year with CSI's goal of the Professional realizing the value of CSI and continue Membership beyond the Chapter Challenge Year.

Who is eligible for CHAPTER CHALLENGE?

- Chapter Challenge is open to a Member of an Architect, Engineer, Interior Designer, or General Contractor Firm who may not be familiar with CSI or have not been a Member of CSI for at least 3 years.

What Does the CHAPTER CHALLENGE Cost?

- New Member - \$0.00 for the first year of membership:
 - The only cost will be participation:
 - Commitment to attend a minimum of 4 regularly scheduled educational meetings in the Chapter Challenge Year;
 - Report the value of being a CSI Member to a Principal or Decision Maker in the Chapter Challenge Member's Firm a minimum of two times during the Chapter Challenge Year.

How to apply for CHAPTER CHALLENGE?

- Fill out TODAY the attached CSI Membership Application and return it to the Great Lakes Region Membership Chair in the Newsletter.



PO Box 81
Annapolis Junction, MD 20701
Phone: 800-689-2900
CSI Tax ID#: 53-0242938
Fax to: 703-940-8600

Enroll online at www.csiresources.org/join

MEMBERSHIP TYPES

Professional: \$375

I am a technically experienced individual whose primary function is to author, manage, or communicate building information; to create, interpret, or use construction documents; or to educate, support, or assist the construction industry.

Emerging Professional: \$200*

I am an individual who has less than three years experience in any construction-related field and am a prospective Professional Member.

Student: \$70*

I am a full-time student enrolled in an undergraduate or graduate program in a construction industry curriculum at an educational institution.

**Emerging Professional membership is limited to three years, at which time members must renew at the Professional level.*

CSI Membership

CSI Membership is good for one year, with your membership starting the day that your payment is received and processed.



Prices and information are subject to change.

MEMBERSHIP ENROLLMENT FORM

Personal Information

First name: _____ Middle initial: _____ Last name: _____

Nickname: _____

Title: _____

Firm name: _____

Website: _____

Primary Address: _____

City | State | Zip: _____

Primary phone: _____ Fax: _____
 (____) _____ (____) _____

Primary Email: _____

Date of birth: _____

Please review the listings on the back and enter the corresponding number(s) that best describe the following:

Occupation code: _____ Firm type code: _____

Membership Dues and Chapter Designation

Membership Dues (See types of membership above) \$ _____

Home Chapter (See reverse side) _____ Included

Membership Certificate (Optional) \$ 15.00

Total (US funds only) \$ _____

Signature* _____

**Required to validate your enrollment form.*

(Payable to CSI—please specify "Member Dues" and if renewing membership include member ID on memo line.)

Visa Mastercard AMEX Check

Card # _____ CVV Code _____ Exp Date _____

Signature* _____

**Signature required for credit card authorization. If using a credit card, please do not email form for security purposes.*



Occupation Codes

100 Specifier or Specifications Consultant	118 A/E Drafter – CAD Operator	137 Surety Professional
101 Architect	119 Estimator	138 Insurance Professional
102 Forensic Architect	120 Surveyor	139 Accountant
103 Landscape Architect/ Designer	121 Construction Manager	140 Attorney
104 Interior Designer/Space Planner	122 General Contractor	141 Manufacturer's Rep/ Supplier
105 Project Manager	123 Subcontractor	142 Building Product Distributor
106 Contract Administrator	124 Constructor	143 Electronic Media Manufacturing Personnel
107 Civil Engineer	125 Construction Trades	144 Project Information Manager
108 Environmental Engineer	126 Labor Representative	145 Publisher
109 Water Resources Engineer	127 Test Lab Personnel	146 Graphic Designer
110 Structural Engineer	128 A/E Representative	147 Technical Writer
111 Electrical Engineer	129 Public Agencies Staff	148 Computer Support Specialist
112 Electronics Engineer	130 Building Official	149 Systems Administrator
113 Mechanical Engineer	131 Building Inspector	150 Association Staff
114 Forensic Engineer	132 Building Owner	151 Academician/Professor/ Teacher
115 Urban Planner	133 Developer	152 Academic Staff
116 Engineering Technician	134 Facilities Manager	153 Student
117 Consultant	135 Realtor	154 Other
	136 Construction Finance Professional	

Firm Codes

300 Commercial Developer
301 Municipal Government
302 State Government
303 Federal Government
304 Product Distributor
305 Manufacturer/Supplier
306 A/E Firm
307 Architectural Design Firm
308 Construction Management
309 Contractor
310 Subcontractor
311 Other (indicate on application)
312 Academic
313 Association/ Technical Society

Locate the numbers corresponding to your occupation and type of firm, then write them in on the front of this form.

Chapters

A home chapter is included as part of your CSI membership. Designate your preferred home chapter on the front of this application. If one is not chosen, the home chapter will be assigned based on your address. For more information, visit www.csiresources.org/communities/components.

Alabama

Birmingham
Huntsville
Mobile Bay
Montgomery

Alaska

Cook Inlet

Arizona

Phoenix
Tucson

Arkansas

Little Rock

California

East Bay-Oakland
Fresno
Los Angeles
Orange County
Redwood Empire
Sacramento
San Diego
San Francisco
Santa Clara Valley

Colorado

Denver
Pikes Peak

Connecticut

Hartford
Housatonic

District of Columbia

DC Metropolitan

Florida

Greater Orlando
South Florida
Pensacola
Suncoast
Tampa Bay

Georgia

Atlanta

Hawaii

Honolulu

Illinois

Chicago

Indiana

Evansville
Indianapolis

Iowa

Central Iowa
Crandic

Kansas

Flint Hills
Mid-Kansas

Kentucky

Louisville

Louisiana

Acadiana
Baton Rouge
New Orleans
Shreveport

Maryland

Baltimore

Massachusetts

Boston

Worcester County

Michigan

Grand Rapids
Lansing

Metropolitan Detroit

Minnesota

Minneapolis-St. Paul
Twin Ports

Mississippi

Mississippi

Missouri

Central Missouri
Greater St. Louis
Kansas City
Southwest Missouri

Nebraska

Nebraska

Nevada

Las Vegas

New Hampshire

New Hampshire

New Jersey

New Jersey

New Mexico

Albuquerque

New York

Buffalo-Western NY
Eastern New York
Long Island
Metropolitan New York
Rochester

Syracuse

North Carolina

Charlotte
Raleigh-Durham

North Dakota

North Dakota/Red River Valley

Ohio

Akron-Canton
Cincinnati
Columbus
Cleveland
Dayton-Miami Valley

Oklahoma

Oklahoma City
Oklahoma State Univ.

Oregon

Portland
Willamette Valley

Pennsylvania

Greater Lehigh Valley
Central Pennsylvania
Erie-Northwestern
Pennsylvania
Northcentral Penn
Philadelphia
Pittsburgh

Rhode Island

Rhode Island

South Carolina

Charleston
Grand Strand
Greenville

Tennessee

Chattanooga
Knoxville
Memphis
Nashville

Texas

Amarillo
Austin
Dallas
Fort Worth
Houston
San Antonio

Utah

Salt Lake City

Vermont

Vermont

Virginia

Blue Ridge
Central Virginia
Northern Virginia
Richmond
Tidewater

Washington

Mt. Rainier
Puget Sound
Spokane

Wisconsin

Fox River Valley
Madison
Milwaukee

CSINext

(Virtual Chapter)

NEWSLETTER

Great Lakes Region CSI Quizmaster – May 2024

Jack P. Morgan, FCSI, CCS, CCCA, CDT, AIA, LEED Green Associate, NCARB, SCIP

- 1. Integrated projects are distinguished by all of the following characteristics except:**
 - a. Development of virtual project model through input from a collaborative team.
 - b. Trust-based collaboration between project team members.
 - c. Maximized efficiency through design , fabrication, and construction.
 - d. “Just as needed” team involvement to reduce owner’s pre-construction expenses.

- 2. All of the following are examples of project soft costs except which one:**
 - a. Relocation.
 - b. Commissioning.
 - c. Due Diligence Surveys
 - d. Design Fees.
 - e. Topographic Surveys.

- 3. Guidance for the proper preparation of the bid form and any attached unit price schedules should be included in the:**
 - a. Invitation to Bid
 - b. Instruction to Bidders.
 - c. Specifications.
 - d. Addenda.

- 4. Benefits of D-B-B method of project delivery include the following except:**
 - a. Project schedules can be established in advance.
 - b. Cost is not usually the primary consideration for selection.
 - c. All participants in the construction industry are familiar with it.
 - d. The Owner can use the same A/E Firm as contracted for the design to provide construction services.

- 5. Which of the following is True concerning application of Integrated Project Delivery:**
 - a. Mutual benefit and reward and because of early involvement, compensation based on value added and best for the project.
 - b. Collaborative team effort reduces planning and design expenses.
 - c. Determining of liability for decisions to generally made by the team leader in order to reduce arbitration expenses.
 - d. Technologies such as data exchange protocols evolve on a phase-by-phase basis.

ANSWERS – See page 3

NEWSLETTER

CSI-S Summer Planning Meeting

Each year successful many CSI chapters hold a planning meeting to set goals, review annual plans, prepare for the new fiscal year. A good CSI-S affiliate tied to the parent chapter can benefit from holding this same type of activity. Inviting your CSI-S leaders to the parent chapter planning meeting is a great way of creating interaction and help them with the planning of their own summer meeting.

Every campus, every parent chapter will have different activities, varying timelines. Look over these offerings with your specific chapter in mind. Use this to provoke thoughts, then turn those thoughts into actions. This simple outline serves as a template for getting the plans for the year on written down.

"A goal without a plan is just a wish."

Antoine de Saint-Exupéry:

University/Community College Student CSI-S Meeting Format

Attendees: Faculty Advisor, Student Officers & Members, Local CSI Chapter Leaders

1. Possible calendar of events for upcoming fiscal year
 - a. September
 - i. CSI overview with parent chapter
 - ii. Plan for School's Welcome Back Event-table with CSI organization info- new member outreach
 - b. October
 - i. Election of Officers
 - ii. Discuss Dale C. Moll Award/CDT class study
 - iii. Guest speaker- Parent Chapter Leader
 - c. November
 - i. Industry Hot Topic Speaker
 - d. December
 - i. Christmas party
 - e. January
 - i. Attend Parent Chapter Meeting (all student members)
 - ii. Social Networking- Student introductions/intern opportunities
 - f. February
 - i. Industry Hot Topic Speaker
 - g. March
 - i. Attend local CSI Trade Show
 - h. April
 - i. Student Competition Info

NEWSLETTER

- a. May
 - i. Cinco De Mayo Party
 - b. June
 - i. Attend CSI Parent Chapter Golf Outing
2. Summer Break activity idea's- give back- volunteer for Habitat for Humanity or similar construction driven charity.

**Thad Goodman, FCSI, CDT, CCPR, LEED Green Associate,
Academic Program Committee**

NEWSLETTER

Chapter	President	Email	Website for Information
Akron-Canton	Bryan Ziga	bryan.ziga@primeeng.com	Website
Cincinnati	Kirk Paisley	kirk.paisley@bdclarchitects.com	Website
Cleveland	Mark Jacobson	mark.jacobson@kuraray.com	Website
CSI Next	Mark Ogg	mark.ogg@jll.com	Website
Evansville	Clay Ellerbrook	cellerbrook@haferdesign.com	
Grand Rapids	Andrea Baird	albaird@rrj.com	Website
Indianapolis	Tony Julian	tonyjulian2013@gmail.com	Website
Lansing	Brian Delaney	delaney@mayottearchitects.com	
Louisville	Sam Cilone	cilone@fastsigns.com	Website
Metro Detroit	Mallory Hoffman	mallory@signaturespec.com	Website

NEWSLETTER

OFFICERS		
Gregg Jones President gjones@abonmarche.com 260-216-0222	Kirk Paisley President-Elect kirk.paisley@bdclarchitects.com 513-964-1154	Scott Mitchell-Taylor Immediate Past President staylo2021@outlook.com 216-870-1970
John Workley Vice President 1 john.workley@vocon.com 216-539-1645	Open Vice President 2	Ken Schmidt Treasurer kschmidt@sewardassociates.net 317-979-1700
Ivette Bruns Institute Director ibruns@ratiodesign.com 317-258-4180	Open Secretary	Open Emerging Professional
COMMITTEE CHAIRS		
Open By-laws Chair	Jack Morgan Awards Co-Chairs morwalsoplad1@gmail.com 317-508-4516	Thad Goodman Academic Liaison thadg@nationalgypsum.com 614-296-5375

NEWSLETTER

COMMITTEE CHAIRS

<p>Ed Avink Certification Chair avinkbksolutions@gmail.com 616-450-8338</p>	<p>Glen Baines Region Conference Chair glen@Bainesinc.com 317-626-9034</p>	<p>Brad Saeger Education Chair bsaeger@moodynolan.com 216.356.4172</p>
<p>David Proudfit Electronic Communications Chair Dsp-csi@cinci.rr.com 513-607-2030</p>	<p>Blair Reese Membership Chair breese@ghafari.com 313-269-3868</p>	<p>Scott Mitchell-Taylor Nominating Chair staylo2021@outlook.com 216-870-1970</p>
<p>Open Planning Chair</p>	<p>Jack Morgan Program Chair, Librarian morwalsoplad1@gmail.com 317-508-4516</p>	<p>Gary L. Beimers Technical Chair gbeimers@comcast.net 616-295-2232</p>

NEWSLETTER STAFF

<p>Jack Morgan Co-Editor morwalsoplad1@gmail.com 317-508-4516</p>	<p>Ed Brown Newsletter Distribution ebrown@eticagroup.com</p>	<p>Scott Mitchell-Taylor Co-Editor 2 staylo2021@outlook.com</p>
--	---	--

NEWSLETTER

Yearly Reporting Requirements

To ensure continuity in operations, including timely dues payments to chapters, and to acknowledge compliance with the affiliation agreement, every component is asked to complete two reports per year:

May 31 Report

Submit: Officer and leader roster for upcoming fiscal year

September 30 Report

Attest that:

- The component is in good standing to conduct business (current with state and current with IRS)
- Directors and officers' insurance is in place
- General liability insurance is in place
- Banking information is current

Identify:

Any enabling document that changed in previous fiscal year-

- Submit updated copies if have not already
- If bylaws were updated, must also confirm reviewed by independent legal counsel experienced with non-profit, tax-exempt organizations prior to adoption.

Submit:

- Financial documents from the previous year, including state of activities, balance sheet, and cash flow.
- Potential recruitment and customer lists

These reports will be available at least two months ahead of their due date and will be accessible through the Chapter and Region Leader Community.

In the case that a component is not able to meet one of these obligations, the component and CSI national will work together to create a plan to become compliant.

NEWSLETTER



**CONGRATULATIONS
CDT and CCS Exam - Fall 2023**

Nathan Alderfer, CSI, **CCS** – Indianapolis

Michelle Decker, CSI, **CDT** - Grand Rapids

David Hand II, CSI, **CDT** - Grand Rapids

Christine Kennedy, CSI, **CCS**, **CDT** - Metropolitan Detroit

Christine Kennedy, CSI, **CCS**, **CDT** - Metropolitan Detroit

James Sforza, CSI, **CDT** - Akron-Canton

Megan J Stokes, CSI, **CDT** - Cleveland

John Stouffer, CSI, **CDT** - Akron-Canton