

CSI Salt Lake Chapter Positions

This description of Chapter offices and positions was extracted from the national CSI website, our chapter bylaws, and practices of our chapter. Descriptions may have to be adjusted to accommodate actual member participation. Roles may also be adjusted as a result of committee and board decisions throughout the year.

Board members and Chairman must assume all responsibilities of associated Vice-Chairmen and committees if these roles are not filled or if members with this roles are not performing their assigned duties. Members should consider lightening the burden on chairmen and board members wherever possible.

Salt Lake Chapter of CSI – Leadership and Committee Roles

Executive Board Members

President (Chairman of the Board)

- Attend and preside over Chapter Executive Board meetings and chapter meetings.
- Appoint Chairmen of committees and delegate authority.
- Serve as ex-officio member of committees.
- Motivate, support and guide committee chairmen.
- Identify and develop future chapter leadership.
- Appoint delegates to annual Institute meeting, unless otherwise elected by members.
- Represent chapter to Institute, Region, and local construction community.
- Manage chapter business. Sign all agreements and formal instruments.
- Keep chapter members informed and connected to region and national Institute activities.
- Assure that board and committees are functioning properly.
- Learn and know the “*Rules of the Board of the Institute*” and the “*Regulations for Annual Meetings of the Institute*”.
- Conduct board and committee orientations.

President Elect

- Attend Chapter Executive Board meetings and chapter meetings.
- Become familiar with procedures and requirements of president office.
- Perform assignments and duties as assigned by the president or the board.
- Serve in absence of president.
- Accept office of president for upcoming year.

Immediate Past President (Advisor to the Board)

- Attend Chapter Executive Board meetings.
- Advise board concerning successes and issues of previous years.
- Serve as liaison with local professional and trade associations (AIA, ACEC, AGC, and others).

Vice President(s)

- Attend Chapter Executive Board meetings.
- Serve upon the absence of both the President and the President Elect.
- Attend assigned committee meetings as an ex-officio committee member.
- Direct and coordinate assigned committee activities.
- Represent committee Chairmen at Executive Board Meetings.
- Inform President and Board of committee activities, plans, and concerns.
- (If number of functioning committees is substantial, a second Vice President may be elected. Our chapter then refers to them as the Vice President-Industry and Vice President-Professional.)

Treasurer (Financial Chairman)

- Attend Chapter Executive Board meetings (or send Vice Chairman if we have one).
- Meet with financial committee and have orientation meeting.
- Keep accurate financial records for chapter, including maintaining accurate bookkeeping of checks, deposits, and dues reimbursements from Institute.
- Present monthly budget to chapter board for approval.
- Assure that chapter is incorporated.
- Prepare annual chapter budget in detail.
- Submit financial report at annual business meeting. (Auditor's report is due at the first board meeting after the start of the fiscal year).
- Prepare schedule of fixed annual payments for tax reporting forms and post office mailing permits.
- File tax return (if applicable).
- Recruit assistant(s) to serve as committee members and train them to serve as treasurer.

Finance Vice-Chairmen - Fund Raising

- Attends Chapter Executive Board meetings when Treasurer cannot attend.
- Assist Treasurer and learn how to prepare budgets for each month.
- Assist in analyzing and reviewing chapter's monthly financial statements.
- Prepare proposed budget for next fiscal year prior for April board meeting.
- Prepare to become Treasurer in future.
- Meet with Finance committee to discuss possible fund raisers.
- Help plan and organize fund raisers.

Finance Committee Member(s)

- Attends committee meetings.
- Become familiar with chapter's financial practices.
- Assist in planning and implementing fund raisers.

Student Affiliate(s)

- Serve as ex-officio member of board.
- Attend Chapter Executive Board meetings when possible (does not vote).
- Attend Professional Development committee meetings.
- Inform students of CSI activities, CDT, and the value of CSI membership.
- Help organize student design competitions and scholarship fundraisers.

Executive Board Members (continued)

Director – Industry (2 year position)

- Attend Chapter Executive Board meetings.
- Serve as chairman over ad hoc and special committees as needed, with emphasis on vendors and other members of the construction industry.
- Prepare to assume other roles on board in future years.

Director – Professional (2 year position)

- Attend Chapter Executive Board meetings.
- Serve as chairman over ad hoc and special committees as needed, with emphasis on architects, engineers, and other professionals.
- Prepare to assume other roles on board in future years.

Secretary

- Attend Chapter Executive Board meetings.
- Send out notices of board and chapter meetings to applicable members at least 7 days before meeting.
- Prepare agendas for executive board meetings.
- Record and prepare minutes of executive board meetings.
- Keep written record of chapter activities.
- Receive, distribute, and promptly answer all chapter correspondence.
- Maintain permanent chapter file of correspondence, membership records, minutes of meetings, rosters, chapter newsletters, and other non-technical chapter publications.
- Keep updated on current membership roster on CSI website. Inform board of new members.
- Cosign agreements and formal instruments.
- Perform (if not being performed by others) or verify performance of the following roles:

Chapter Historian

- Keep organized files of the following:
 - Photos
 - Chapter and Region newsletters
 - Board meeting agendas
 - Other correspondence, such as e-mail.
 - Current Chapter by-laws.
- Write up end-of-year synopsis of everything that the chapter did throughout the year.
- Deliver all files to new chapter President at end of year.
- Prepare to become secretary in future years.

House Chairman

- Make all arrangements for membership meetings, board and executive committee meetings, and special meetings.

Chairmen, Vice-Chairmen, and Committees

Programs Chairman

- Attend Chapter Executive Board meeting. (Send committee member if attendance isn't possible.)
- Meet with committee as needed to establish program and activity ideas for year.
- Create calendar for year and implement plans for monthly and yearly activities.
- Maintain complete files on programs committee activities.
- Prepare final report to chapter board at final June chapter board meeting. Summarize programs and make recommendations for future programs.
- Plan monthly lunch programs at least 3 months in advance of each meeting.
 - Assign committee members to contact speakers, obtain commitments, and obtain needed equipment for each Program.
- Write up short program description and short biography of speaker two weeks before each program. Send it to the following at least 10 days before applicable program:
 - Chapter Secretary (to send RSVP requests for determining attendance numbers)
 - Chapter Newsletter Editor (for inclusion in newsletter).
 - Chapter Publicity Chairman (to send to AIA, local construction magazines, non-members, etc.)
 - Chapter Website Manager. (to put on website).
 - Membership Chairman (to use for phone tree to members, if needed.)
- Recruit members to serve on Program Committee. Consider the following committee roles:

Programs Vice-Chairman - Activities

- Meet with Programs committee to brainstorm ideas for programs and social activities.
- Attend Symposium committee meetings as ex-officio member of that committee.
- Plan Christmas party, awards party, barbeques and other social functions.
- Create calendar for year and implement plans for monthly and yearly activities.
- Assist Programs Chairman in preparing final report to chapter board at final June chapter board meeting. Summarize social activities and make recommendations for future activities.
- Plan activities at least 3 months in advance of each event.
- With committee's assistance and after board approval, do the following:
 - Contact speakers and/or entertainers and obtain their commitments.
 - Arrange for all equipment needed by speakers and/or entertainers.
 - Reserve host facilities of sufficient size.
 - Arrange for food or catering event if required.
 - Arrange for decorations, if desired.
- Write up short activity description (and short biography of speaker, if applicable) two weeks before each activity. Send to the following at least 10 days before program:
 - Chapter Secretary (to send out for RSVPs to determine attendance numbers).
 - Chapter Newsletter Editor (for inclusion in newsletter).
 - Chapter Publicity Chairman (to send to AIA, construction magazines, non-members, etc.)
 - Chapter Website Manager. (to put on website).
 - Membership Chairman (for use in phone tree to desired attendees.)

Programs - Committee Member(s)

- Attend all Programs committee meetings and help with planning.
- When assigned, assist with contacting speakers, entertainers, and the like.
- Assist in setting up programs and events as assigned.
- Assist in clean up after events.
- Prepare to become program chairman or vice-chairman in future years.

Chairmen, Vice-Chairmen, and Committees (continued)

Membership Chairman

- Attend Chapter Executive Board meeting. (Send a membership Vice-Chairman if needed.)
- Meet with committee to establish recruitment marketing plan, including plans for renewing existing members and reinstating past members.
- Create calendar for year and implement plans for monthly and yearly activities.
- Maintain complete files on membership committee activities.
- Prepare final report to chapter board at final June chapter board meeting.
- Contribute at least 1 article to chapter newsletter on ways to increase membership.
- Establish a list of potential members with current e-mail addresses.
 - E-mail potential members about meetings and events.
- Recognize new members and visitors at chapter meetings.
- Provide membership enrolling information at chapter meetings and product shows.
- Conduct orientation program for new members
 - It has been suggested that a quarterly breakfast orientation meeting be held with all new members that joined in the previous 3 months. Also invite president and membership committee.
 - Provide CSI pins to new members.
- Recruit members to serve on Membership Committee. Consider the following committee roles:

Membership Vice-Chairman - New-Members

- Meet with committee to help establish recruitment marketing plan.
- Help make phone calls to membership when necessary.
- Coordinate and attend new member orientation programs.
- Assign members to “buddy” with new members.
- Greet attendees at monthly meetings, focusing on new members and guests.
- Obtain bio information about new members and email to newsletter publisher.
- Prepare to become Membership Chairman in future years.

Membership Vice-Chairman - Member Retention

- Meet with committee to establish strategy for reinstating past members.
- Coordinate and help make phone calls to those who have not renewed membership.
- Help make phone calls to membership when necessary.
- Greet members at monthly meetings, focusing on those who haven’t attended for awhile.

Membership Vice-Chairman - Member Recruitment

- Meet with committee to establish a recruitment marketing plan.
- Coordinate efforts to contact potential members and explain value of CSI membership.
- Help make phone calls to membership when necessary.
- Greet visiting attendees at meetings and events, focusing on non-members and guests.

Membership - Committee Member(s)

- Participate in phone trees for meetings, Symposium, BBQs and other activities.

Chairmen, Vice-Chairmen, and Committees (continued)

Symposium Chairman

- Attend Chapter Executive Board meeting. (Send committee member if attendance is not possible.)
- Maintain complete files on Symposium committee activities.
- Determine theme for Symposium (recommend something with marketing value to architects).
- Prepare final report to chapter board at final June chapter board meeting. Summarize Symposium and make recommendations for future symposiums.
- Provide monthly article to newsletter editor updating CSI members in preparation for Symposium.
- Conduct meetings with Symposium committee at least monthly. Plan at least the following:
 - Calendar of actions to take each month.
 - Determine event location, with space for trade show, luncheon, and seminars.
 - Determine timing of events on day of Symposium.
 - Estimate expected costs to CSI for food, host facility, and other amenities.
 - Determine expected gains to CSI for vendor booths and other fund raising plans.
 - Verify trade show and seminar layouts.
 - Verify lunch (or dinner?) and other amenities to be provided for guests and vendors.
 - Verify arrangements of seminar speakers and topics and keynote speaker and/or entertainment.
 - Determine marketing and attendance strategy.
 - Option: Colorado chapter requires participating vendors to each personally invite three architects.
 - Invite affiliate organizations to participate in show (student design competitions.)
- Include CSI booth at product show.
- Verify that all speakers and caterers are arranged for and set up appropriately.
- Write up a short Symposium description and short biography of all speakers. Send to the following at least 3 months before Symposium:
 - Chapter Secretary (to send out for RSVPs to determine CSI member attendance).
 - Chapter Newsletter Editor (for inclusion in newsletter).
 - Chapter Publicity Chairman (to send to AIA, local construction magazines, non-members, etc.)
 - Chapter Website Manager. (to put on website).
 - Membership Chairman (to use for phone trees.)
- Do the following or recruit members to serve on Symposium Committee. Consider the following committee roles:

Symposium Vice-Chairman - Marketing Coordinator(s)

- Attend all Symposium committee meetings.
- Create or oversee creation of posters, ads, and mail-outs.
- Determine calendar for issuing posters, ads, and mail-outs.
- Determines possibilities for media advertising in newspapers, AIA e-mailings, websites, construction magazines, and the like. Deliver advertisements to each as appropriate.
- Participate in and encourage phone tree and e-mail contacting.

Symposium Vice-Chairman - Attendee Coordinator(s)

- Attend all Symposium meetings.
- Create master list of potential guests and attendees (architects, interior designers, owners, city officials, building managers, engineers, contractors, etc)
- Deliver ads and posters (or oversee deliverance of these things) to all potential attendees.
- Establish phone tree and oversee phone campaign in weeks before Symposium.
- Determine expected number of attendees to accommodate at Symposium lunch program.

Chairmen, Vice-Chairmen, and Committees (continued)

Symposium Vice-Chairman – Seminar/Entertainment Coordinator(s)

- Attend all Symposium meetings.
- Determine seminar speakers and topics (CEU credits recommended). Suggestions include:
 - Unusual and new cutting edge products and technology, including products and technology only common in other countries.
 - Tips on dealing with common problems in architect offices such as project coordination.
 - CDT training, BIM training and spec writing training sessions.
- Establish schedule for classes and where each will be held.
- Determine keynote speaker or entertainment during lunch (or dinner?).
- Contact and obtain commitments from all speakers.
- Ensure that each speaker has needed equipment for presentations.

Symposium Vice-Chairman - Tradeshow Coordinator(s)

- Attend all Symposium meetings.
- Establish list of vendors, architects, engineers, contractors, and other potential booth providers in tradeshow.
- Creates document establishing tradeshow participant requirements, including:
 - Booth fees required.
 - Space allowed for each tabletop.
 - Up charges for anyone desiring special locations or extra space.
 - Times when tabletops must be set up and taken down.
 - If decided by committee, requirement to personally invite three architects each.
 - Information on where to send fees and who to contact if lunch or other amenities are wanted.
 - Information on any food or amenities to be provided for participants.
- Contact all potential vendors and send them list of requirements.
- Create (or oversee creation of) layout for tabletops.
- Prepare to become Symposium Chairman in future years.

Symposium Vice-Chairman - Catering Coordinator(s)

- Attend all Symposium meetings.
- Contact Symposium host facility and secure the following:
 - Rooms for tradeshow, seminars, lunch meetings and whatever else.
 - Tables and chairs for lunch, seminars, CSI booth, etc.
 - Projectors, projector screens, extension cords and other items as needed by speakers.
 - Any other rooms planned for use by vendors, guests, or CSI members.
- Contact caterer(s) and order all food for the Symposium.
- Contact providers of other services desired by the committee for the Symposium and order what is wanted.
- Coordinate caterer's services with services provided by Symposium host building.

Chairmen, Vice-Chairmen, and Committees (continued)

Professional Development Chairman (Previously - Education Chairman)

- Attend Chapter Executive Board meeting. (Send committee member if attendance is not possible.)
- Create calendar for year and implement plans for monthly and yearly activities.
- Contribute at least 1 article to chapter newsletter on ways to educate others in the industry or how to communicate information better in the industry.
- Maintain complete files on committee activities.
- Prepare final report to chapter board at final June chapter board meeting.
- Develop, implement, and administer chapter education programs. Could include:
 - Hands-on demonstrations at community college.
 - Seminars at AIA tradeshow and CSI Symposiums.
 - Guest appearances at schools.
- Review applications for format and content of proposed programs.
- Communicates with Institute about the programs being offered and CEU and LU status.
- Perform the follow or recruit other members to serve on the Professional Development Committee. Consider the following roles:

Professional Development Vice-Chairman - Certification

- Attend all meetings conducted by the Professional Development Chairman.
- Contribute at least 1 article for chapter newsletter on the importance of CDT and/or ways to encourage architects and others to become CDT certified.
- Meet with Professional Development committee to determine ways to promote CDT and to train people in CDT.
- Find Proctor, Assistant Proctor, and exam sites, and all exam arrangements.
- Coordinates educational programs for certification study and exam preparation.
- Conducts chapter certification tutorial program for AIA.
- Contribute to Education Committee Chairman's seminars.
- Verify that study course participants are registered properly for exams
- Become aware of what is happening at local schools regarding CDT training and specification training.
- Maintain records on current CDT certified persons in our area.

Professional Development Vice-Chairman - Academic Affairs

- Attend all meetings conducted by the Professional Development Chairman.
- Make contact and be a liaison with local academic institutions that have engineering, architectural, or other construction related programs.
 - Come up with plan to encourage academic institutions to develop student CSI membership and construction document programs.
 - Solicit affiliate group participation at chapter meetings and activities.
 - Coordinate affiliate group activities with chapter.
- Create plan for spreading awareness to schools about specifications and CDT.

Professional Development Vice-Chairman - Scholarship

- Attend all meetings conducted by the Professional Development Chairman.
- Write 1 scholarship-related article for newsletter.
- Determine chapter funds that may be used for scholarships and who should receive them.
- Plan at least 1 fund raising event for scholarship fund.

Chairmen, Vice-Chairmen, and Committees (continued)

Publications Chairman (Newsletter Editor)

- Attend Chapter Executive Board meeting. (Send committee member if attendance is not possible.)
- Conduct and attend Publications Committee meetings.
- Create calendar for year and implement plans for monthly activities.
- Maintain complete files on committee activities.
- Oversee preparation, production and distribution of all chapter publications.
- Create chapter newsletter (electronic) by second week of month, to include the following:
 - Information on upcoming lunch meetings, socials, and other chapter activities.
 - Latest information on upcoming region and national CSI events.
 - List new members (with bio of each when provided by membership committee.)
 - 1 or 2 articles provided by board members and committee chairmen.
 - Articles borrowed from other region newsletters or from national CSI members.
 - Synopsis on previous month's luncheon and other previous events.
 - Photos of events when available.
 - Other promotional articles as appropriate.
 - Occasional membership roster.
 - List of board and committee chairmen members.
- Recruit members to serve on Publications Committee. Consider the following roles:

Publications Vice-Chairman -Electronic Communications (Web-Site)

- Manage Website. Keep website updated and include at least the following:
 - Upcoming chapter events and calendar
 - Current chapter board members and committee chairmen
 - Current Symposium information
 - Newsletters
 - Certification information.
 - Links to national and regional websites.

Publications Committee member(s)

- Provide monthly articles for newsletter. These may include.
 - Tips for specifiers
 - Reports on new products.
 - Reviews of previous month's meetings and activities.
 - Other articles as requested by Publications Chairman.
- Issue newsletter when Publications Chairman is not able to.
- Review newsletters for typos and suggest improvements.
- Become acquainted with newsletter requirement to prepare to be future publications chairman.

Publications – Photographer(s)

- Photographer: Take digital photos of CSI events for newsletter and website.

Chairmen, Vice-Chairmen, and Committees (continued)

Technical Chairman (Technical Publications Editor)

- Attend Executive Board Meetings for approval of publication topics and actual publication.
- Conduct meeting with Technical committee to determine all aspects of planned technical document(s) and to make assignments.
 - Assignments to members of committee may include the following:
 - Thorough research on various aspects of the planned publication.
 - Creation of publication.
 - Artwork for cover, charts, and illustrations.
 - Arranging publishing of document.
- Contribute at least 1 article for chapter newsletter.
- Write article, or encourage members to write articles, for *The Construction Specifier* magazine.
- Find out about Region and Institute level technical activities (if any) and participate in them when possible. Keep chapter board informed of these activities.
- Develop at least 1 technical document for use by the chapter. (This document must be sufficiently professional-looking and useful to architects to be sellable as a chapter fund-raiser.)
 - Technical document should be an all-inclusive resource on a subject understood well by at least one member of the technical committee.
 - Technical document is a marketing tool for the industry of the subject matter, but should NOT attempt to market a particular manufacturer's products.

Technical Vice Chairman

- Attend technical committee meetings and accept assignments.
- Contribute article for *The Construction Specifier* magazine if possible.
- Contribute to technical document for use by the chapter. Assignments may include the following:
 - Perform thorough research on aspects of the planned publication.
 - Format and create actual publication.
 - Create artwork for cover, charts, and illustrations.
 - Arrange for publishing of document.
- Prepare to become future Technical Chairman.

Technical Committee Member(s)

- Attend technical committee meetings and accept assignments.
- Contribute article for *The Construction Specifier* magazine if possible.
- Contribute to technical document for use by the chapter. Assignments may include the following:
 - Perform thorough research on aspects of the planned publication.
 - Format and create actual publication.
 - Create artwork for cover, charts, and illustrations.
 - Arrange for publishing of document.

Chairmen, Vice-Chairmen, and Committees (continued)

Awards Chairman

- As needed or as requested by board, attend Chapter Executive Board meeting.
- Conduct Awards Committee meetings.
- Create calendar for year and implement plans for monthly and yearly activities.
- Maintain complete files on committee activities.
- Contribute at least 1 article for the newsletter on the various types of awards available or on the importance of awards.
- Become familiar with all Honors and Awards available on the CSI Institute website and keep track of important due dates.
- Determine all possible nominations for Regional or National awards this fiscal year.
- Assure that awards applications and forms are completed properly and submitted before deadline dates.
- Submit nominations for Regional or Institute awards program.
- Obtain awards and plaques for chapter members for final Awards meeting in June.

Awards Vice-Chairman

- Become aware of all the Honors and Awards available on the CSI Institute website.
- Meet with Awards Chairman to help determine where awards may apply and to share responsibilities for turning in the proper paperwork on time.
- Assist Awards Chairman where needed.
- Prepare to become Awards Chairman in future years.

CSI-Salt Lake Chapter: Organization Chart

