Chapter Technical Publications Guide

1. **Introduction** – This guide is intended to provide basic information about developing technical publications at the Chapter level.

2. **Types of Publications** – Chapters should focus their Technical Programs on developing technical resources that would be suitable for use and reference by CSI members and other members of the design and construction community. Of particular value would be resources that focus on techniques, problems, and solutions specific to the region in which the Chapter is located.

   Examples of the types of resources suitable for Chapter development would be publications, whether new or in need of review, update, or revision, educational resources, or practice guidelines. In the case of publications, the length is not particularly important; what is important is that there is sufficient content to cover the topic in enough detail to be useful and that sufficient time and effort has been used in development to ensure that any recommendations or findings in the publication are arrived at by group consensus and are demonstrable.

   Some examples:
   White Papers – Authoritative reports or guides that address and discuss issues encountered in construction projects, and offer recommendations on how to avoid or solve them. White papers are used to educate readers and help people make decisions.

   Specification Guides – Guides designed to assist practitioners in authoring quality specifications for a defined work result or design solution. These works are not required to follow any set form or format; flexibility is encouraged in how information may be presented.

3. **Development**
   3.1. **How to Develop** – Development should be carried out by a group of volunteers appointed by the Chapter Technical Chair or President. Volunteers from all four basic project teams should be sought, with a focus on experience in the subject matter of the resource if possible. Interest and willingness to work are at least as important as experience however.

   The team should be charged by the leadership in consultation with the volunteers on the team to define the task before them, much as Task Teams are charged by the President at Institute level. Those charges should include a description of the expected outcomes, a time line for development, a description of what resources can be made available to the volunteers, and a description of the expected outreach, research, or other work that may be conducted in developing this technical resource. Buy in and involvement of member volunteers in developing and defining the task is crucial, and changes in charges should be expected to allow them to respond to changes in the team's capabilities or interests, or findings uncovered by their development effort.

4. **Review** – As with any CSI technical publication, Chapter technical resources must be reviewed by a broad selection of persons to ensure that 1) what they communicate does not deviate from what is presented in current CSI Institute technical publications, 2) any recommendations are appropriate and based on consensus best practice, and 3) the information and recommendations are communicated in a way that is understandable to readers and is eminently readable.

   It is not necessary to invoke specifications writing best practices in authoring or reviewing publication drafts (the 4Cs or "Say it once in the right place" don't apply in non-specifications as they do in specifications), but it is important to ensure that the what those guidelines are destined to ensure, chiefly clarity and correctness, as well as consistency, are present in publications your Chapter develops.

   4.1. **How to Review** – Similar to the process for development, a group of volunteer members of varying backgrounds and experience levels should be appointed by the Chapter Technical Chair or Chapter President. If necessary, the volunteers who authored the resource can act as an initial review body, but involving individuals who were not part of the authoring process will result in a better document in most cases. Depending on the scope or nature of the document, it may also be desirable to expand review beyond the Chapter, either by distribution to a closed list of subject matter experts who may not be CSI members, or through a more public commentary period carried out through the Chapter website. Review time should be budgeted into your development schedule, each review period should run for a minimum of three to six weeks depending on the length of the publication, and an additional two to four weeks should be budgeted at the close of commentary for resolving comments received. If the review will be by a closed group of reviewers, then use of tracked commentary in an application like Word may be useful for collecting comments, if comments will be solicited from a broader group, then providing a draft with line numbers and explicit instructions for how to submit commentary will be needed. Naturally, any method of gathering commentary that works for your development process is suitable, the above are only provided as suggestions.

   Understand that many comments you receive will vary from detailed copy editing to non-specific philosophical discussions. The value of each comment will need to be evaluated in context of the publication, its intent, and its development.

5. **Member Involvement** – It is of particular importance for member leaders to involve a broad selection of members in the development and review of these resources. It may seem easiest to turn to your most experienced and respected members, and ask them to author and review, but if you choose to do so, you are cheating your Chapter of an opportunity to broaden its knowledgebase and number of experts, and other members of an opportunity to learn and exchange knowledge. The outcome of this program in the form of a published resource is important, but the development and learning effort is also a significant member advantage and one of the chief reasons why people in the industry respect CSI resources and join CSI. Work to continue that by involving new members along with the old guard in the development of these resources.

6. **Publication and Distribution**

6.1. **Submit a Resource** – It is the intent that all Chapter developed technical resources be made available to other CSI members as a member benefit. This will be accomplished is through the use of the CSINet website. Once developed and reviewed, publications should be submitted to Institute Technical Committee by way of staff liaison Greg Ceton (gceton@csinet.org) for distribution to members through that resource. No additional review will be performed by Institute Technical Committee prior to distribution, so be certain your resources are in a finished state before sending them along.

6.2. **Educational Opportunities** – Development of these resources will have the side benefit of instilling expertise and knowledge in members. That knowledge will likely be suitable basis for Chapter and Region educational sessions, as well as subject matter for submission of presentation topics at the CSI National Convention.

7. **Commendations** – Chapters are free to submit their completed documents to the Institute Awards Committee for recognition. Depending on the type of resource, there are several possible awards that may apply, including the Technical Document Award or the Communication Award.