



**New and Updated CSI Tools to Make  
Your Job Easier**

**Hartford Chapter CSI**

**Presented by:**

**Ross G. Spiegel, FAIA, FCSI, CCS,  
CCCA, LEED AP BD+C**

**Chairman, Practice Guide Task Team**

**12 September 2011**



# **New & Updated CSI Tools=Easier Job**

## **Today's Discussion Will Cover**

- **MasterFormat 2011 Update & Annual Revisions**
- **New Practice Guides Series**
- **UniFormat 2010**
- **Preliminary Project Description (PPDFormat)**
- **SectionFormat**
- **GreenFormat**



# New & Updated CSI Tools=Easier Job

## MasterFormat 2011

- Master List of Numbers & Titles Classified by Work Results or Construction Practices
- Used to Organize:
  - Project Manuals
  - Detailed Cost Information
  - Relate Drawing Notations to Specifications
  - Organize Product Data
- Replaces Previous Editions

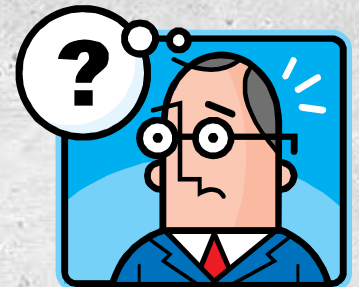




# New & Updated CSI Tools=Easier Job

## MasterFormat 2011

- CSI Has Instituted an Annual Revision Process for MasterFormat
- Annual Meeting Held to Judge Change Proposals
- Decisions Based On:
  - Eligibility?
  - Duplicate of Existing MF04 Listing?
  - Prior Action by MasterFormat Maintenance Task Team?
  - Documentation?
  - Minor Changes?





# New & Updated CSI Tools=Easier Job

## MasterFormat 2011

MasterFormat® 2011 – Numbers and Titles		MasterFormat® 2011 – Numbers and Titles	
<b>00 00 00</b>	<b>Procurement and Contracting Requirements</b>	<b>07 25 00</b>	<b>Weather Barriers</b>
00 01 01	Project Title Page	07 26 00	Vapor Retarders
00 01 05	Certifications Page	07 26 13	Above-Grade Vapor Retarders
00 01 07	Seals Page	07 26 16	Below-Grade Vapor Retarders
00 01 10	Table of Contents	07 26 23	Below-Grade Gas Retarders
00 01 15	List of Drawing Sheets	07 27 00	Air Barriers
00 01 20	List of Schedules	07 27 13	Modified Bituminous Sheet Air Barriers
<b>00 10 00</b>	<b>Solicitation</b>	07 27 16	Sheet Metal Membrane Air Barriers
00 11 00	Advertisements and Invitations	07 27 19	Plastic Sheet Air Barriers
00 11 13	Advertisement for Bids	07 27 23	Board Product Air Barriers
00 11 16	Invitation to Bid	07 27 26	Fluid-Applied Membrane Air Barriers
00 11 19	Request for Proposal	07 27 36	Sprayed Foam Air Barrier
00 11 53	Request for Qualifications	<b>07 30 00</b>	<b>Steep Slope Roofing</b>
<b>00 20 00</b>	<b>Instructions for Procurement</b>	07 30 91	Canvas Roofing
00 21 00	Instructions	07 31 00	Shingles and Shakes
00 21 13	Instructions to Bidders	07 31 13	Asphalt Shingles
00 21 16	Instructions to Proposers	07 31 13.13	Fiberglass-Reinforced Asphalt Shingles
<b>00 22 00</b>	<b>Supplementary Instructions</b>	07 31 16	Metal Shingles
00 22 13	Supplementary Instructions to Bidders	07 31 19	Mineral-Fiber Cement Shingles
00 22 16	Supplementary Instructions to Proposers	07 31 23	Porcelain Enamel Shingles
<b>00 23 00</b>	<b>Procurement Definitions</b>	07 31 26	Slate Shingles
<b>00 24 00</b>	<b>Procurement Scopes</b>	07 31 29	Wood Shingles and Shakes
00 24 13	Scopes of Bids	07 31 29.13	Wood Shingles
00 24 13.13	Scopes of Bids (Multiple Contracts)	07 31 29.16	Wood Shakes
00 24 13.16	Scopes of Bids (Multiple-Prime Contract)	07 31 33	Composite Rubber Shingles
00 24 16	Scopes of Proposals	07 31 53	Plastic Shakes
00 24 16.13	Scopes of Proposals (Multiple Contracts)	<b>07 32 00</b>	<b>Roof Tiles</b>
00 24 16.16	Scopes of Proposals (Multiple-Prime Contract)	07 32 13	Clay Roof Tiles
<b>00 25 00</b>	<b>Procurement Meetings</b>	07 32 16	Concrete Roof Tiles
00 25 13	Pre-Bid Meetings	07 32 19	Metal Roof Tiles
00 25 16	Pre-Proposal Meetings	07 32 23	Mineral-Fiber Cement Roof Tiles
<b>00 26 00</b>	<b>Procurement Substitution Procedures</b>	07 32 26	Plastic Roof Tiles
<b>00 30 00</b>	<b>Available Information</b>	07 32 29	Rubber Tiles/Panels
<b>00 31 00</b>	<b>Available Project Information</b>	<b>07 33 00</b>	<b>Natural Roof Coverings</b>
00 31 13	Preliminary Schedules	07 33 13	Sod Roofing
00 31 13.13	Preliminary Project Schedule	07 33 16	Thatched Roofing
00 31 13.16	Preliminary Construction Schedule	07 33 63	Vegetated Roofing
00 31 13.23	Preliminary Project Phases	<b>07 40 00</b>	<b>Roofing and Siding Panels</b>
00 31 13.26	Preliminary Project Sequencing	<b>07 41 00</b>	<b>Roof Panels</b>
00 31 13.33	Preliminary Project Milestones	07 41 13	Metal Roof Panels
00 31 16	Project Budget Information	07 41 23	Wood Roof Panels
00 31 19	Existing Condition Information	07 41 33	Plastic Roof Panels
00 31 19.13	Movement and Vibration Information	07 41 43	Composite Roof Panels
00 31 19.16	Acoustic Information	07 41 63	Fabricated Roof Panel Assemblies
00 31 19.19	Traffic Information	<b>07 42 00</b>	<b>Wall Panels</b>
		07 42 13	Metal Wall Panels
		07 42 13.13	Formed Metal Wall Panels



# New & Updated CSI Tools=Easier Job

## New Practice Guide Series

- First Three Practice Guides Released This Year
  - Project Delivery Practice Guide (PDPG)
  - Construction Specifications Practice Guide (CSPG)
  - Construction Contract Administration Practice Guide (CAPG)
- Next Three To Be Released Next Year
  - Product Representation Practice Guide (PRPG)
  - Sustainable Design & Construction Practice Guide (SDPG)
  - Facility Management Practice Guide (FMPG)



# New & Updated CSI Tools=Easier Job

## **New Practice Guide Series**

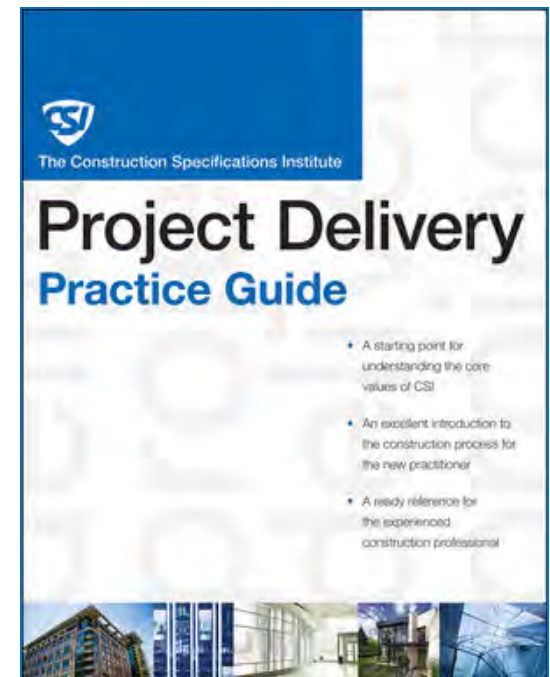
- Library of Comprehensive References for the Construction Professional
- Examines Important Concepts and Best Practices for Particular Aspect of Construction Process
- Serves as a Guidebook for Understanding Your Job
- Provides Basic Information on Specific Subject
- Useful for Both Novice & Experienced Practitioner
- Updates & Replaces Project Resource Manual



# New & Updated CSI Tools=Easier Job

## Project Delivery Practice Guide

- Fundamental Knowledge for Documentation, Administration, and Delivery of Construction Projects
- Library of Comprehensive References for the Construction Professional
- Understanding CSI's Core Values
- Study Aid for CDT Exam



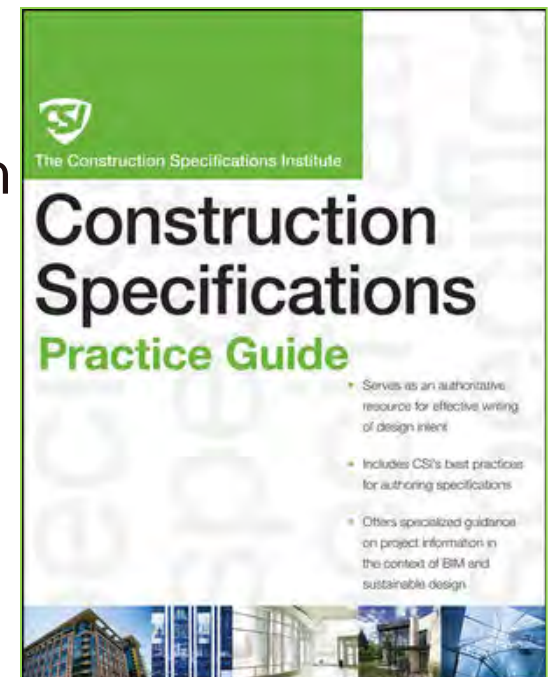




# New & Updated CSI Tools=Easier Job

## Construction Specifications Practice Guide

- Focuses on Roles & Responsibilities of Specifications Professional
- Guidelines on Writing Quality Specifications & Product Selection
- Best Practices for:
  - Managing Product Information
  - Working With BIM
  - Working With Integrated Project Delivery (IPD)





# New & Updated CSI Tools=Easier Job

## Construction Contract Administration Practice Guide

- Overview of Standard Contract Documents & Their Use in Administering Construction Contracts Successfully
- Advice on:
  - Effective Communications
  - Terms & Contents of Standard Agreements
  - Project Forms & Their Use
  - Compliance with Codes & Regulations





# New & Updated CSI Tools=Easier Job

## Upcoming Practice Guides

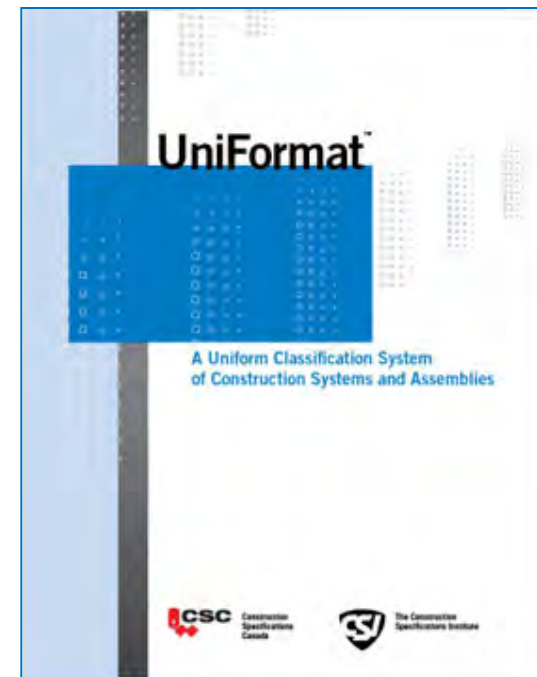
- Product Representation Practice Guide (PRPG)
  - Replaces CCPR Module in Project Resource Manual
  - Newly Rewritten by Industry Experts
- Sustainable Design & Construction Practice Guide (SDPG)
  - New Subject Matter for CSI
  - Provides Insight on Important New Area of Practice
- Facility Management Practice Guide (FMPG)
  - New Subject Matter for CSI
  - Discusses an Area of Building Life Cycle Not Previously Covered in CSI Guides



# New & Updated CSI Tools=Easier Job

## UniFormat 2010

- Method of Arranging Construction Information Based on Functional Elements
- Does Not Consider Materials & Methods Used to Accomplish Functions
- Used Mainly for Performance Specifications & Preliminary Project Descriptions
- Format for Cost Estimates During Schematic Design
- Useful for Projects Using BIM Software

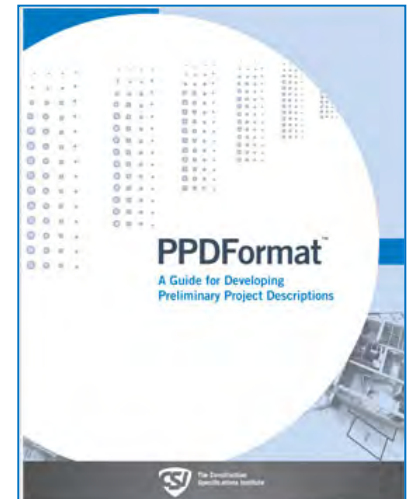




# New & Updated CSI Tools=Easier Job

## Preliminary Project Descriptions (PPDFFormat™)

- Recommended Format for Organization & Presentation of Preliminary Project Descriptions
- Guidelines for Writing & Use for Project Documentation
- Used During Schematic Design Phase
- Describes Systems & Assemblies Shown in Schematic Design Drawings





# New & Updated CSI Tools=Easier Job

## SectionFormat/PageFormat

- **SectionFormat** = Recommended Format for Construction Specifications
- **PageFormat** = Recommended Format for Presenting Specifications
- **Together** Provide Foundation for Organizational Structure of an Individual Specification Section
- **Construction Document Phase Tool**
- **Detailed Description** of Article Titles





# New & Updated CSI Tools=Easier Job

## SectionFormat/PageFormat

SectionFormat			
<b>SectionFormat Outline</b>			
<p>Standard Article titles in a section. <b>BOLD UPPERCASE</b>. Primary titles that may be elevated to primary Article titles. See Legend on PF 5.</p>			
<p><b>PART 1 – GENERAL</b></p> <p><b>SUMMARY</b>            Section Includes            Products Furnished <sup>[OR]</sup> Supplied But Not Installed Under This Section            Products Installed But Not Furnished <sup>[OR]</sup> Supplied Under This Section            Related Requirements</p> <p><b>PRICE AND PAYMENT PROCEDURES</b>            Allowances            Unit Prices            Alternates <sup>[OR]</sup> Alternatives            Measurement and Payment</p> <p><b>REFERENCES</b>            Abbreviations and Acronyms            Definitions            Reference Standards</p> <p><b>ADMINISTRATIVE REQUIREMENTS</b>            Coordination            Preinstallation Meetings            Sequencing            Scheduling</p> <p><b>SUBMITTALS</b></p> <p><b>ACTION SUBMITTALS / INFORMATIONAL SUBMITTALS</b>            Product Data            Shop Drawings            Samples            Certificates            Delegated Design Submittals            Test and Evaluation Reports            Manufacturers' Instructions            Source Quality Control Submittals            Field <sup>[OR]</sup> Site Quality Control Submittals            Manufacturer Reports            Sustainable Design Submittals            Special Procedure Submittals            Qualification Statements</p>	<p><b>CLOSEOUT SUBMITTALS</b>            Maintenance C            Operation and            Bonds            Warranty Docu            Record Docum            Sustainable De            Software</p> <p><b>MAINTENANCE SUBMITTALS</b>            Spare Parts            Extra Stock Ma            Tools</p> <p><b>QUALITY ASSURANCE</b>            Regulatory Ag            Qualifications            Manufacture            Suppliers            Fabricators            Installers / A            Testing Agen            Licensed Pro            Certifications            Sustainability S            Preconstruction            Field <sup>[OR]</sup> Site S            Mock-ups</p> <p><b>DELIVERY, STORAGE AND HANDLING</b>            Delivery and A            Storage and Ha            Packaging Was</p> <p><b>FIELD <sup>[OR]</sup> SITE QUALITY CONTROL</b>            Ambient Condi            Existing Condi</p> <p><b>WARRANTY <sup>[OR]</sup> EXTENDED CARE</b>            Manufacturer V            Special Warran            Extended Care</p>	<p><b>PART 2 – PRODUCTS</b></p> <p><b>OWNER-FURNISHED <sup>[OR]</sup> OWNER-SUPPLIED PRODUCTS</b>            New Products            Existing Products</p> <p><b>[SYSTEMS] / [ASSEMBLIES] / [MANUFACTURED UNITS] / [EQUIPMENT] / [COMPONENTS] / [PRODUCT TYPES] / [MATERIALS] / [USER-DEFINED HEADING]</b></p> <p><b>Manufacturers</b>            Manufacturer List            Substitution Limitations            Product Options</p> <p><b>Description</b>            Regulatory Requirements            Sustainability Characteristics</p> <p><b>Performance / Design Criteria</b>            Capacities</p> <p><b>Operation</b>            Operators            Controls            Operation Sequences</p> <p><b>Materials</b>  <b>Assembly <sup>[OR]</sup> Fabrication</b>            Factory Assembly            Shop Fabrication            Assembly <sup>[OR]</sup> Fabrication Tolerances</p> <p><b>Mixes</b></p> <p><b>Finishes</b>            Primer Materials            Finish Materials            Shop Finishing Methods</p> <p><b>ACCESSORIES</b></p> <p><b>SOURCE QUALITY CONTROL</b>            Tests and Inspections            Non-Conforming Work            Manufacturer Services            Coordination of Other Tests and Inspections</p>	<p><b>PART 3 – EXECUTION</b></p> <p><b>INSTALLERS</b>            Installer List            Substitution Limitations</p> <p><b>EXAMINATION</b>            Verification of Conditions            Preinstallation Testing            Evaluation and Assessment</p> <p><b>PREPARATION</b>            Protection of In-Place Conditions            Surface Preparation            Demolition / Removal</p> <p><b>ERECTION / INSTALLATION / APPLICATION</b>  <b>[USER-DEFINED PROCESS]</b>            Special Techniques            Interface with Other Work            Systems Integration            Tolerances</p> <p><b>[REPAIR] / [RESTORATION]</b></p> <p><b>RE-INSTALLATION</b></p> <p><b>FIELD <sup>[OR]</sup> SITE QUALITY CONTROL</b>            Field <sup>[OR]</sup> Site Tests and Inspections            Inspections            Non-Conforming Work            Manufacturer Services</p> <p><b>SYSTEM STARTUP</b></p> <p><b>ADJUSTING</b></p> <p><b>CLEANING</b>            Waste Management</p> <p><b>CLOSEOUT ACTIVITIES</b>            Demonstration            Training</p> <p><b>PROTECTION</b></p> <p><b>MAINTENANCE</b></p> <p><b>ATTACHMENTS</b></p> <p style="text-align: center;"><b>END OF SECTION</b></p> <p>Schedules            Tables            Illustrations            Forms</p>



# New & Updated CSI Tools=Easier Job

## SectionFormat/PageFormat

*Snapshot of Header Zone:*

[PROJECT NO.]  
[DATE]

[PROJECT NAME]  
[PROJECT LOCATION]

*Snapshot of Title Zone, with relationship to Part and Article titles:*

SECTION [SECTION NUMBER]  
[SECTION TITLE]

**PART 1 GENERAL**

**1.01 SUMMARY**

*Snapshot of paragraphs and subparagraphs:*

- A. Proportions:
  - 1. Scratch Coat or Leveling Bed: One part portland cement to 3 parts sand.
  - 2. Underbed: One part portland cement to one-half part lime to 2 parts sand.
- B. Mixing:
  - 1. Scratch Coat or Leveling Bed:
    - a. Charge and mix sand and portland cement.
    - b. Add sufficient water to provide workability to trowel on vertical surface.
  - 2. Setting Bed: Mix cement, sand, and lime with sufficient water to provide workability at as low a slump as practicable.

*Snapshot of End of Section notice with relationship to paragraph:*

**3.01 PROTECTION**

- A. Protect finished mosaic surfaces from staining or discoloration until final inspection and acceptance.

**END OF SECTION**

*Snapshot of Footer Zone:*

[AUTHOR]  
[FILE NAME]

[SECTION TITLE]  
[SECTION NUMBER] - [PAGE NUMBER]





# New & Updated CSI Tools=Easier Job

## GreenFormat™

- **What:** Web-based CSI Format That Allows Manufacturers to Accurately Report Product Sustainability Properties

New Feature: [Tell CSI which products you'd like to see listed on GreenFormat!](#)

CSINET.ORG    MASTERFORMAT.COM

### GreenFormat™

Find the Right Green Products For Your Project

Home    About    Pricing    Reference    Help    Contact    Login

- Search "Green" Product Information
- Evaluate the Green Characteristics of Products
- Choose the Products that Fit Your Project
- Obtain Spec-friendly Results

[Start Searching now!](#)

**FIND A PRODUCT**

Product or Manufacturer  in

- [Search](#) - Type in Product Information and select field
- [Browse](#) - by MasterFormat Number
- [Advanced Search](#) for products meeting LEED credits or certifications
- [iPhone App](#) - Search GreenFormat

**LIST A PRODUCT**

- [Register](#) or [Log-in](#) to your account.
- [Tell me more!](#)

**LEARN:**

- Designers & Specifiers: Learn about Integrating GreenFormat Data into Project Specifications in this [free webinar](#). CE credits available.
- Manufacturers: Learn how to list your products in this [free webinar](#).



# New & Updated CSI Tools=Easier Job

## GreenFormat™

- **Aids** Practitioner in Researching & Finding Green Products for a Project
- **Enables** Evaluation of Green Characteristics of Products
- **Provides** Designers, Constructors & Building Operators with Basic Information to Help Meet “Green” Requirements
- **Contains** Information in Five Categories
  - Background Information
  - Product Details
  - Product Lifecycle
  - Additional Information
  - Authorization



# New & Updated CSI Tools=Easier Job

## Today We Discussed

- MasterFormat 2011 Update & Annual Revisions
- New Practice Guides Series
- UniFormat 2010
- Preliminary Project Description (PPDFormat)
- SectionFormat
- GreenFormat



# New & Updated CSI Tools=Easier Job Questions – Want More?



**Ross G. Spiegel, FAIA, FCSI, CCS, CCCA,  
LEED AP BD+C**

**Associate/Senior Specification Writer/Green Team Leader  
Fletcher-Thompson, Inc.**

**203-225-6551**

**[RSpiegel@ftae.com](mailto:RSpiegel@ftae.com)**