



2022 ANNUAL REPORT

PARTNERS  
IN  
PROGRESS

CONSTRUCTION INDUSTRY INSTITUTE



*We're learning from each other. Through pilot tests, we see what works, what doesn't, so we can use that information to get better faster.*

*CII is about the tools, the collaboration, the networking, the community, and working together to make a difference.*

- Tammy Lynam  
Quality Assurance Manager,  
Burns & McDonnell;  
Chair of CII Deployment Committee

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## INTERIM CII DIRECTOR

### Jamie Gerbrecht

It has been an honor and blessing to serve as Interim Senior Director of CII with staff, academics, and members focused on safety and the CII mission, vision, and values. Through careful listening and frequent interaction with membership, I have thoroughly enjoyed furthering the work of my predecessors to ensure CII is benefiting member companies and is well positioned to advance its mission.

Reflecting on 2022, my thoughts turn to the collective driving force of CII — dedicated member companies with their valued volunteers, our amazing academic leaders, and the loyal CII staff. With you in 2022, CII's key achievements included the following:

- Increased focus on safety with plans to update CII's Zero Accidents Techniques research
- Continued providing our valuable R&D platform enriched by collaborative ideation and workshop activities
- Filled Executive Committee vacancies with experienced, enthusiastic, and dedicated leaders
- Delivered the highly acclaimed CII Executive Leadership Program and Best Practices Course with their world-class instructors
- Recognized nine individuals with CII awards
- Further developed the CII Scorecard to improve performance tracking and reporting
- Began joint efforts with UT Austin to enhance the CII Governance Plan

In 2023, we will launch our next round of R&D and gather at our Annual Conference in San Antonio. There we will celebrate CII's 40th anniversary, thanks to our founding members, UT Austin, and the many companies that have joined throughout the years. Looking further ahead, with decades of rich history to build upon, member companies can truly look forward to being "Partners in Progress" for the next 40 years and beyond!



## 2023 CII INCOMING CHAIR

### Tricia Thibodeaux

#### Vice President, Global Health, Safety & Environmental Fluor Corporation

Looking back on another uniquely challenging year, I reflect on how much we have accomplished – together. The pandemic has not slowed our efforts at CII.

CII is governed and driven by industry leaders, which remains a key contributor to CII's success over the decades. I believe this makes us well-positioned to understand the increasing demands and responsibilities of our member volunteers and their organizations.

My role at Fluor has provided me with the ability to engage in several volunteer opportunities in CII, including serving on Research Teams, coordinating our team's engagement across CII while serving as Fluor's Board Advisor, leading the Funded Studies Committee and most recently, as part of the Executive Committee and CII Chair. My busy colleagues and I make time to volunteer in CII because we are passionate about improving how we execute our projects and we find that our own professional development is critical to our success as a team. We find CII to be the perfect platform for both.

Over the years, I have watched our Institute improve our demographics and diversity, expand into new research areas, and even overcome a few challenges. I am very proud to be a part of this CII leadership team. Together, we are advancing CII's mission and vision and delivering the tools, topical research, and educational resources our member companies are asking for.

I look forward to continued growth and success in 2023 – for CII and each of our member organizations.



CII Deployment Committee Members, 2022

## CII RESEARCH RESULTS

CII continues to deliver relevant research that is both practical and visionary. In 2022, diverse teams from across our industry shared innovative insights and useful tools covering a range of topics from our foundation in safety to forward-thinking opportunities in circularity to realistic implementation practices that can help organizations get to value faster.

### RT-380

#### *Value and Opportunities of a Circular Economy on Capital Projects*

**Become more sustainable - and competitive**  
The construction industry is one of the world's largest resource consumers and waste generators. It's responsible for more than 50% of materials consumption in the U.S. alone. But finite resources make such consumption practices unsustainable. This team studied how to move from a linear "take, make and waste" economy to one that is circular, more sustainable and competitive. They developed two "how-to" guides on circularity readiness and implementation, offering successful examples of using materials efficiently and longer.

### RT-381

#### *Adapting through Organizational Agility*

**Manage organizational change successfully**  
In today's increasingly changing business environment, adaptability has become critical. Yet, approximately 70% of all organizational change efforts fail. This team studied the impact of organizational agility and successful change practices. They created the downloadable Organizational Change Adaptability Tool (OCAT) to help organizations develop an effective change plan that best fits their needs.

### RT-382

#### *Technologies to Prevent Serious Injuries and Fatalities Related to Last-minute Work Changes*

**Technologies to keep safety first**  
Serious injuries and fatalities in construction are compounded by last-minute changes on a construction site. Technology can help. This team explored how organizations can use technology to manage change in these complex, dynamic conditions and improve safety. They cataloged 40 available technologies and used extensive knowledge and experience to create a protocol with detailed checklists to help organizations evaluate whether to adopt each technology.



### RT-383

#### *Quantitative Validation and Deployment of the I2PD Approach*

##### **Drive performance with integrated delivery**

How do you know if your complex capital project is a good fit for Industrial Integrated Project Delivery (I2PD) that can lead to better performance? This team builds on the original RT-341 CII research, systematically evaluating real-world projects and optimal collaboration and integration (CI) methods to develop practical, Excel-based decision-support tools. The I2PD Project Selection Tool can assess and measure project uncertainty. Organizations can use the CI Principles and Methods Selection Tool to gain confidence they need to select and apply the right CI methods for their project.

### RT-384

#### *Materials Tracking and Tracing Standard and Guidelines*

##### **Advance productivity, efficiency with digital information threads**

Knowing where materials are in the supply chain and when they will arrive can deliver a direct cost-benefit for automated material transactions, onsite material searches, craft labor productivity, and construction operations. These findings are among many this team used to create a digital materials model and useful guide for digitally tracking and tracing materials upstream and onsite that can improve craft labor productivity up to 6% and reduce schedules up to 16%. A maturity assessment and smart four-part strategy can help you decide what kind of technology - barcode, RFID or Bluetooth - to use, its potential return on investment, and even contract language to ensure consistent implementation across vendors and project teams.

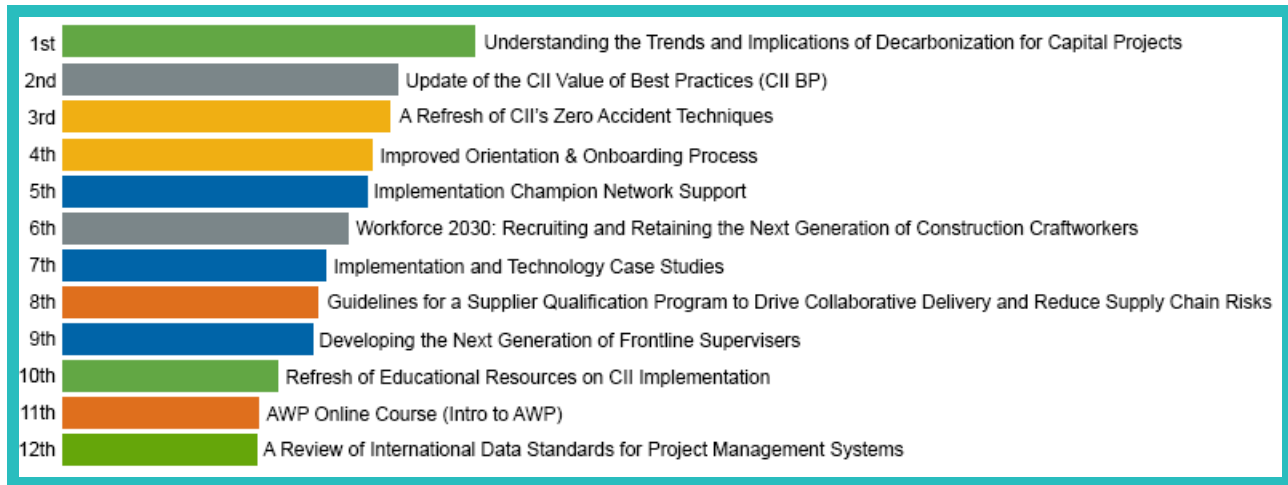
## IDEATION PROCESS

### From Ideas to Impact

What started on a whiteboard in August and expanded online has become the CII Research Agenda for 2023. We launched our idea-generation process at our Annual Convention in Cleveland, where members were asked to offer ideas for research initiatives that would drive a positive impact on their businesses.

As a result, more than 300 ideas provided both tactical insights and an excellent overview of what is currently important to CII members. Among the topics highlighted as priorities are deployment, case studies, technology, energy transition/decarbonization, safety and workforce, and supply chain.

Leaders from across CII and its Executive, Sector Leadership and Strategic Planning committees prioritized these ideas into 12 areas.



In November, the CII Board of Advisors formed six breakout groups and identified opportunities to improve or redirect topics. This rigorous process is enabling CII to stay on top of evolving member needs while sharpening our existing focus areas to ensure research initiatives remain relevant today - and tomorrow.

For a high-level summary of the idea-generation effort, please visit <https://www.construction-institute.org/blog/2022/november-2022/the-ideation-process>.

## COLLABORATION

### Building Creative Collaborations

CII continues to pursue creative partnerships and smart alliances that make sense for our members and benefit the capital projects industry - from safety to project delivery to professional development.

For example, CII has been exploring opportunities to work with organizations such as the Construction Safety Research Alliance at the University of Colorado Boulder to keep safety at the forefront of all that we do. We are partners with the Charles Pankow Foundation to advance Collaborative Design-Build and Delivery.

CII also teamed with the Project Management Institute to develop the Construction Professional in Built Environment Projects (CPBEEP)<sup>™</sup> certification to provide the skills and knowledge needed to bring large, complex construction projects to life profitably, efficiently, and sustainably.

## CII AWARDS

### CARROLL H. DUNN AWARD OF EXCELLENCE

*For significant contributions in the construction industry that demonstrate leadership to a high degree of dedication to improving cost, scheduling, quality and safety of the capital facilities process.*

**Anne Ellis, Executive Director of the Pankow Foundation** is a recognized

structural engineer, trailblazer, and champion of innovation and Architectural Engineering and Construction industry advancement. Her countless contributions have truly improved our industry, engableng dynamic growth and innovation in technology, business, and operations.



### RICHARD L. TUCKER AWARD FOR LEADERSHIP AND SERVICE

*For an active CII member that furthers the mission of CII through leadership, mentoring/advocating and ambassadorship.*

**G. Edward Gibson, Jr., Arizona State University** This "Father of PDR!"

(Project Definition Rating Index) researched, developed, and delivered some of CII's most popular tools for decades, taught at and lead a string of world-class engineering schools, and has won multiple distinctions - and the most CII awards - along the way.



### JAMES B. PORTER, JR. AWARD FOR TECHNOLOGY LEADERSHIP

*Recipients show significant technology contributions to the construction industry while demonstrating personal dedication to the development and advancement of these technologies within capital projects.*

**Burcin Kaplanoglu, Oracle Industry Lab**

As a recognized industry technologist, innovator, thought leader, and co-founder of the Oracle Industry Lab, Burcin's many contributions and dedication to the construction and engineering industry include demonstrating the value of integration to a common data environment in driving collaboration and faster, better outcomes.



## CII INDIVIDUAL AWARDS

### OUTSTANDING VOLUNTEER

**DARIO RIGAUD, Senior Construction Support Engineer at Fluor**

An expert in Advanced Work Packaging (AWP), Dario has served on the AWP Community for Business Advancement, two joint working goup, and a research team.

### OUTSTANDING ACADEMIC

**DR. AWAD HANNA, Chair of Construction Engineering and Management Program at the University of Wisconsin-Madison**

Awad has long been dedicated to construction research and engineering education, and has led seven CII research teams.

### OUTSTANDING STUDENT

**BING HAN, The University of Texas at Austin**

A graduate research assistant on CII initiatives and event participant, Bing paired exemplary research skills with a willingness to engage participants in their use of 3D models and Immersive Virtual Reality.

## CORE VALUES

CII is a reflection of its members – driven to achieve improved total lifecycle performance through the specific initiatives undertaken. CII values its ability to collaborate broadly across a diverse group of stakeholders.

Paramount to CII's success is a strong focus on safety, productivity, predictability, and efficiency. The institute and its members aspire to the highest levels of social and environmental responsibility, integrity, and ethics.

## FINANCIALS

### 2022 Financial Report

Construction Industry Institute, The University of Texas at Austin  
2022 Financial Report | December 31, 2022

Does not include financial information for PIP

	YTD (12/31/2022)
<b>REVENUES</b>	
Contract & Grants	\$ 556,500
Gifts & Contributions	124,930
Member Dues	4,292,143
Events / Meetings	608,388
Education / Training	713,710
Licensing and Commercialization	82,808
Administrative Services (Subsidiaries)	60,000
<b>TOTAL REVENUES</b>	<b>6,438,479</b>
<b>EXPENSES</b>	
Research at UT	363,340
Research External	822,272
Development at UT	42,795
Development External	52,018
Marketing	100,803
Events / Meetings	591,084
Education / Training	233,266
Administrative Services	219,932
Staff Salary and Fringe Benefit	2,386,157
Travel	67,493
Overhead - UT	46,490
Overhead - Research Project	41,109
Director's Discretionary	1,500
<b>TOTAL EXPENSES</b>	<b>4,968,259</b>
<b>CHANGE IN AVAILABLE FUNDS BALANCE</b>	<b>1,470,220</b>
<b>BEGINNING AVAILABLE FUNDS BALANCE</b>	<b>2,867,425</b>
<b>ENDING AVAILABLE FUNDS BALANCE</b>	<b>\$ 4,337,645</b>
<b>COMPOSITION OF AVAILABLE FUNDS</b>	
Required reserves	\$ 1,375,000
Director's discretionary	98,500
CCIS	76,771
Other available funds	2,787,374
<b>ENDING AVAILABLE FUNDS BALANCE</b>	<b>\$ 4,337,645</b>



**INDEPENDENT ACCOUNTANTS' REPORT  
ON APPLYING AGREED-UPON PROCEDURES**

To the Management and Board of Advisors  
Construction Industry Institute  
Cockrell School of Engineering  
The University of Texas at Austin

We have performed the procedures enumerated below on Member Dues and Available Funds reported in Construction Industry Institute's (Institute) 2022 financial report. The Institute's management is responsible for Member Dues and Available Funds reported in the 2022 financial report.

The Institute's management has agreed to and acknowledged that the procedures performed are appropriate to meet the intended purpose of reporting to the Board of Advisors. This report may not be suitable for any other purpose. The procedures performed may not address all the items of interest to a user of this report and may not meet the needs of all users of this report and, as such, users are responsible for determining whether the procedures performed are appropriate for their purposes.

The procedures and associated findings are as follows:

- We obtained from management the 2022 financial report to be included in the annual report.
- We obtained from management certain financial reports from \*DEFINE, The University of Texas at Austin's software that accounts for the Institute's financial transactions.
- We obtained from management the QuickBooks company file that the Institute uses to supplement \*DEFINE for financial reporting purposes.
- We have provided below a reconciliation of the Institute's "member dues" revenues from membership payments reported in \*DEFINE to the 2022 financial report.
- We have provided below a reconciliation of the Institute's ending "available funds" balances from \*DEFINE to the 2022 financial report.

***Reconciliation of Member Dues per \*DEFINE to the 2022 financial report:***

Membership payments received per *DEFINE:	\$ 4,230,482
Reconciling items:	
Add: 2022 member dues accrued (receivable)	388,900
Add: 2022 member dues received (deferred) in prior year	514,800
Less: 2021 member dues accrued in prior year	(520,020)
Less: 2023 member dues deferred	(375,845)
Add: 2022 Globalization Affiliate fees collected	53,523
Add: Unreconciled difference	<u>303</u>
Member dues reported in financial report	<u>\$ 4,292,143</u>

## FINANCIALS

### Independent Accountant's Report continued

#### ***Reconciliation of Available Funds per \*DEFINE to the 2022 financial report:***

Free balances per *DEFINE:	\$	2,972,952
Add: Encumbered funds (not yet spent)		<u>1,416,454</u>
Adjusted free balances per *DEFINE:		4,389,406
Reconciling items:		
Add: 2022 member dues accrued (receivable)		388,900
Add: Cockrell O/H rebate (receivable)		49,882
Add: PIP support accrued (receivable)		60,000
Add: Other accounts receivable		63,062
Less: 2023 member dues deferred		(375,845)
Less: 2023 Executive Leadership Program revenues deferred		(20,900)
Less: Accounts payable and accrued expenses		(118,897)
Less: CCIS Funds		(76,771)
Less: OS2 IAP Funds		(21,192)
Unreconciled difference		<u>-</u>
Ending available funds balance reported in financial report	\$	<u>4,337,645</u>

We were engaged by Construction Industry Institute to perform this agreed-upon procedures engagement and conducted our engagement in accordance with attestation standards established by the American Institute of Certified Public Accountants. We were not engaged to and did not conduct an audit or review, the objective of which would be the expression of an opinion or conclusion, respectively, on Member Dues and Available Funds reported in the Institute's 2022 financial report. Accordingly, we do not express such an opinion or conclusion. Had we performed additional procedures, other matters might have come to our attention that would have been reported to you.

We are required to be independent of Construction Industry Institute and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements related to our agreed-upon procedures engagement.

This report is intended solely for the information and use of Management and the Board of Advisors of the Institute and is not intended to be and should not be used by anyone other than these specified parties.



Austin, Texas  
March 1, 2023

## CII STAFF



**Jamie Gerbrecht**  
Interim Director



**Daniel Oliveira**  
Interim Associate  
Director of Operations,  
Associate Director for  
Funded Studies



**Jennifer Bien**  
Associate Director  
for Membership  
and Communications



**Deborah DeGezelle**  
Manager of  
Information Services



**Janet West**  
Executive Assistant



**Hong Zhao**  
Manager of  
Financial Services

**Nuria Ayala**  
**Heather Beal**  
**Michael Burns**  
**Erika Corbell**  
**Kristy Delaney**  
**Susan Quaglino**  
**Pipper Ramsey**  
**Debbie Samilpa**  
**Bob Wible**

Research Assistant  
**Vishal Porwal**

## CII STAFF SERVICE RECOGNITION

### Honoring Our Team

A special thank you to our staff members who retired in 2022 following years of service to UT/CII:

Terri Buvia, 36 years  
Bernie Rosenblatt, 24 years  
Pam Wooten, 32 years

## CII MISSION

The mission of CII is to provide a research and development platform to create and drive innovative solutions that tangibly improve business outcomes through an academically-based, disciplined approach.

## CII VISION

CII envisions an efficient capital projects industry that builds predictable value for member organizations, society, and stakeholders. Leveraging new ideas, unique forms of collaboration, and knowledge across the project lifecycle, CII provides unmatched advocacy for the built environment.



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