



ASHRAE Region XIII CRC (2023-2024) Membership Promotion (MP) Workshop 19 Aug 2023 (Sat)

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AGENDA

- ▶ Membership Promotion (MP) Chapter Chairs
- ▶ Membership Grades
- ▶ Recruitment
- ▶ Retention
- ▶ Presidential Award of Excellence (PAOE)
- ▶ Planning for Success



REGION XIII MP CHAPTER CHAIRS (2023-2024)

- ▶ Hong Kong: Ms HU Jing Xia Jessie <jjingxiah@gmail.com>
- ▶ Indonesia: Mr Jati WIDIPUTRA <jatiwidiputra@ymail.com>
- ▶ Japan: Dr Yuichi TAKEMSAS <takemasa@kajima.com>
- ▶ Macau: ?? Co-Chair: Mr Seck Pong CHAN <spchan121@yahoo.com>
- ▶ Malaysia: Dr Kar Hoo HUI <huikarhoou@gmail.com>
- ▶ Philippines: Ms Jean Leilani Grace N CLEMENTE <jnclemente16@gmail.com>
- ▶ Singapore: Mr Ee Seong ENG <eeseong_93@hotmail.com>
- ▶ South Korea: Dr YOON Sungmin <s.yoon@ssku.edu>
- ▶ Taiwan: Mr Yu-Hsun CHEN <eason.daikin@gmail.com>
- ▶ Thailand: Dr Thosapon KATEJANEKARN <thosaponk@hotmail.com>



(Update: 2 Aug 2023)

WHAT DOES IT MEAN TO BE A MEMBERSHIP PROMOTION CHAIR?

- **RECRUITMENT**

- Attract new Chapter members in all industry segments

- **RETENTION**

- Keep existing members engaged and prevent cancellations

- **YOUR Ultimate Goal**

Members (start of year) < Members (end of year)

WHAT DOES THE MP CHAIR DO?

Attend Training:

- Centralized Training (Annual Conference)
OR
International Centralized Training (Regions XIII, XIV, AL)
AND
- Chapters Regional Conference (CRC) Workshop
- Training Costs
 - Transportation paid by Society (for one Centralized Training only, CRC transportation is not included)
 - Seek reimbursement from your BOG



FORM A
COMMITTEE!

WHAT DOES THE MP CHAIR DO?

Prepare your Management By Objectives (MBO)

- Set goals with your RVC (by October 1st)
- Recruitment and Retention should be your main focus
- Discuss with your Co-Chair & Committee

Attract new members

- Review current member roster and look for opportunities to diversify
- Organize MP drives and events
- Collaborate with Student Activities (SA) & Young Engineers in ASHRAE (YEA)

Manage delinquent members

WHAT DOES THE MP CHAIR DO?

Encourage payment of Chapter Dues

Encourage Membership Advancements

Recognize YOUR members

- Acknowledge new/advanced members
- Chapter Meetings
- Newsletters / Social Media

Get to know YOUR members!!

- Attend Chapter meetings
- Talk to your Members
- Make them feel welcome

CHAPTER MP COMMITTEE

- ▶ Led by the Chapter MP Chair
- ▶ MP Co-Chair(s): to assist on recruitment & retention
 - ▶ How many? Their roles?
 - ▶ Dedicated Recruitment Chair and Retention Chair
- ▶ Committee Members:
 - ▶ More experienced Chapter members; from different industry sectors
 - ▶ Collaborate with Student Activities (SA) & Young Engineers in ASHRAE (YEA)
- ▶ Prepare the Management By Objectives (MBO)
 - ▶ Set goals with the RVC-MP (by October 1st)



MEMBERSHIP GRADES

- Student Member
 - Affiliate Member
 - Under 30 years old
 - New to ASHRAE
 - Limited to 3 years
 - Associate Member
 - Less than 12 approved years
 - Full Member
 - 12 Society approved years
- Honorary Member
 - Presidential Member
 - Fellow Member
 - Life Member
 - Retired Member

**OUR
FOCUS!**

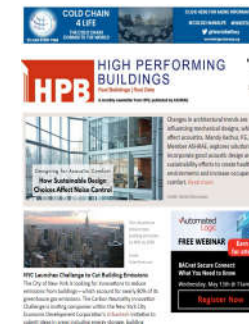
STUDENT MEMBER

- Full-time student in a Society-related approved course of study
- Undergraduate & Graduate
- Dues: \$25/ year



STUDENT MEMBER - BENEFITS

- ASHRAE Journal, eSociety, HVAC&R Newsletter
- High Performance Building Magazine
- Discounts:
 - ASHRAE Publications
 - Society Conference registration
 - Professional Development Courses
- ASHRAE Technology Portal
- **Not** Included:
 - ASHRAE Handbook (can be purchased for \$70 US & \$89 international online/printed)
 - Insurance
 - Ability to hold office at the Chapter, Region, and Society levels
 - Voting Privileges



AFFILIATE MEMBERSHIP

- New to the Industry
- 30 years old or younger or former Military

- Reduced Dues:
 - Year 1 \$65
 - Year 2 \$100
 - Year 3 \$130
 - Year 4 \$260 (Associate Member Grade)

- Previous Student Members are not eligible



AFFILIATE MEMBER - BENEFITS

- ASHRAE Journal, eSociety, HVAC&R Newsletter
- High Performance Building Magazine
- Discounts:
 - ASHRAE Publications
 - Society Conference registration
 - Professional Development Courses
- ASHRAE Technology Portal
- Select Insurance plans
- **Not** Included:
 - ASHRAE Handbook (15% off)
 - Ability to hold office at the Chapter, Region, and Society levels
 - Voting Privileges



ASSOCIATE MEMBER

- Professionals with >12 years Industry Experience
- Returning Members
- Society Dues: Regular \$260/year
- Chapter Dues – Set by each Chapter
 - Optional
 - Encourage payment
 - Dues directly benefit Chapter

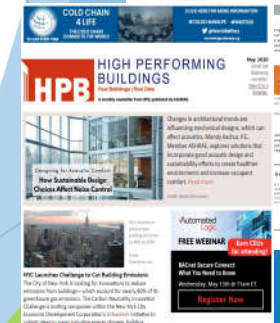


ASSOCIATE MEMBER - BENEFITS

- **NEW Benefits: 2 New this year!**

eLearning Course  150+ to choose from	ASHRAE Standard  100+ to choose from	ASHRAE Handbook  PDF version of the most recent	Handbook Online  4 most recent	ASHRAE Certification Exam Study Guide  3 to choose from
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- Can hold office at Chapter, Region & Society Level
- Voting Privileges
- ASHRAE Journal, eSociety, HVAC&R Newsletter
- High Performance Building Magazine
- Discounts on ASHRAE Publications, Society Conference registration & Professional Development Courses
- ASHRAE Technology Portal
- Insurance plans



FULL MEMBER GRADE

- Professionals with 12 Society-approved years of experience:
 - Post-Secondary Education:
 - Undergraduates: 1 year/year of school (2 min.)
 - Graduates: 1.5 years/year of school
 - Related work experience
 - 1 year/year of employment in related field
 - Professional licensure
 - 3 years



FULL MEMBER GRADE

- Society Dues: Regular \$260/year

- Chapter Dues – Set by each Chapter
 - Optional
 - Encourage payment
 - Dues directly benefit Chapter

MEMBER - BENEFITS

- **NEW Benefits: 2 additional options added this year!**



- Can hold office at Chapter, Region & Society Level
- Voting Privileges
- ASHRAE Journal, eSociety, HVAC&R Newsletter
- High Performance Building Magazine
- Discounts on ASHRAE Publications, Society Conference registration & Professional Development Courses
- ASHRAE Technology Portal
- Insurance plans



MEMBERSHIP ADVANCEMENTS

STUDENT → ASSOCIATE MEMBER

SmartStart Program:

- Transfer from Student Member to Associate Member at reduced rates

- Dues:

	Regular	Developing Economies
Year 1	\$25	\$15
Year 2	\$100	\$60
Year 3	\$130	\$80



- Same benefits as Associate Membership
- Promote to graduating Students - Coordinate with SA Chair

www.ashrae.org/smartstart

MEMBERSHIP ADVANCEMENTS

AFFILIATE → ASSOCIATE

- Advancement - Automatic
- May advance early to Associate Member (have to pay the difference in dues)



Increase in benefits

- Request Advancement:
 - Member (or MP Chair) can email Society membership@ashrae.org

MEMBERSHIP ADVANCEMENTS ASSOCIATE → FULL MEMBER

- Must prove 12-year requirement is met
- Instruct member to update ASHRAE bio in their online profile
- Request Advancement:
 - Member (or MP Chair) can email Society at membership@ashrae.org

**RECOGNIZE ADVANCEMENTS AT EVERY MONTHLY
MEETING & IN YOUR NEWSLETTER!**



RECRUITMENT: MP CHAIR'S JOB

PROMOTE ASHRAE!!!!

COMMUNICATE

- Benefits of ASHRAE
- Regular Chapter newsletters/blog
- Send personal emails

CREATE

- Inviting atmosphere
- Incentives to join

TARGET

- Individuals
- Employers



COMMUNICATE: BENEFITS OF ASHRAE

THE TANGIBLES

- ASHRAE Handbooks
- ASHRAE Journal, Insights, HPB Magazine
- ASHRAE Newsletters/Blog
- ASHRAE Standards
- Leadership Training



THE INTANGIBLES

- Networking
- Personal and Professional Development
- Fun!
- Secure employment or career advancement





March 2021

Alaska Chapter Newsletter
Hot Gas Bypass

resident's Message:

aska ASHRAE Members,

I'd like to believe we just have a couple more months left before we break summer! I hope you are all enjoying the extra sunshine we've been getting. I would like to thank those of you who attended the February meeting. It was well-attended and there was a lively discussion at the end. Thank you all for participating. As well, thank you to those who contributed and/or volunteered during Engineering Month in any capacity. Your efforts are greatly appreciated.

CREATE: INTEREST IN ASHRAE

INVITING ATMOSPHERE

- Greet Members at Meetings
- Recognize Members
 - Member Grade Advancement
 - Membership Milestones (5 yr., 10 yr., 20 yr, etc.)
 - Life Members
 - ASHRAE Certifications
 - Award Achievements
 - PE/PEng license

INCENTIVIZE

- Membership Drives/Contests
- New member gifts



CREATE: INTEREST IN ASHRAE

MEMBERSHIP DRIVES

- At Chapter Meetings
 - “Member Bring a Member” (offer a gift)
 - Set up computer with member application
- Chapter Referral Program
- Award referring member and new member
- Reward Programs for Companies that support membership
 - Recognize at Chapter Meetings, newsletters & Membership emails
- Technical sessions, special member-only events, honors & awards banquets



TARGET MARKET

Engineers / Consultants

Architects

Contractors

Sales Engineers

Distributor

Manufacturer's Reps

Teachers / Researchers

Government, Health & Education Leaders

Design Build Contractors

Facility Managers

Building Owners

Property Managers

Students



TARGET MARKET

Members of other Organizations

ASPE	IFMA (Facilities)
USGBC	CASHE (Healthcare)
AIA	IMechE
MCAA	ISHRAE (India)
ACCA	PHVAC&R (Pakistan)
BOMA	SAIRAC (South Africa)
NAWIC	SAIMechE (South Africa)
AGC	SAICE (South Africa)

ARE THERE OTHERS?

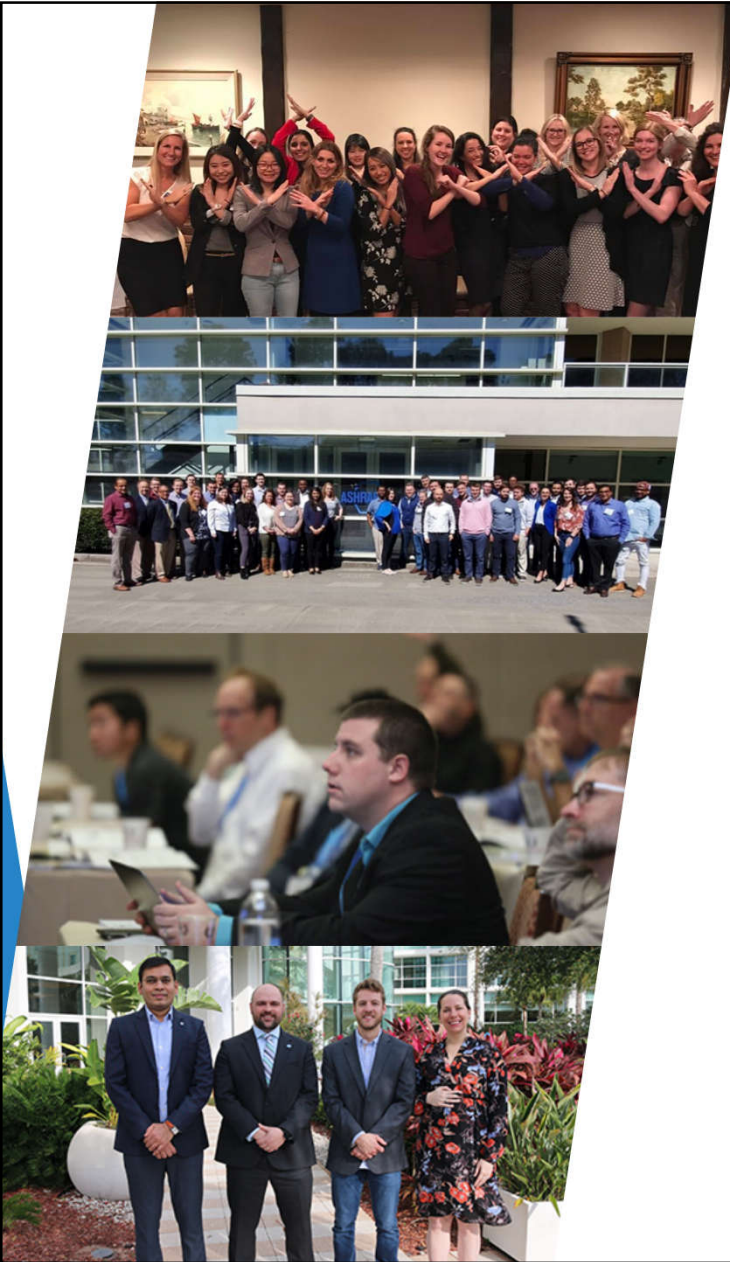
TARGET: CONNECTIONS

What do prospective members want?

- Networking Opportunities?
- Visibility and Recognition?
- Join Chapter/Society Committee?
- Professional Development?
- Connect with industry peers and their customers?
- Career Advancement?
- Leadership Training?
- Fun?

How do you find this out?

Just ASK!!!!



CONNECTING CORE VALUES: WHAT DO PROSPECTIVE MEMBERS & EMPLOYERS WANT?



“How can I better serve my clients”

ASHRAE’s Standards

- Offers design guidance → Provide right solutions to their clients



Chapter Meetings

- Offers local training on industry topics



ASHRAE Webinars

- Training from the comfort of your office on industry topics

CONNECTING CORE VALUES: WHAT DO PROSPECTIVE MEMBERS & EMPLOYERS WANT?



“Ways to connect with industry peers”

ASHRAE provides phenomenal networking opportunities in a non-competitive environment

- Chapter Meetings
- Social Events
- Committee Involvement
- Annual & Winter Conferences

CONNECTING CORE VALUES: WHAT DO PROSPECTIVE MEMBERS & EMPLOYERS WANT?



“Visibility and Recognition”

ASHRAE’s Honors and Awards recognize the technical and personal achievements of our members.

What better way than to be honored by **THE** Society that defines the standards for our industry?

RETENTION: MP CHAIR'S JOB



MAINTAIN VALUE!!!

REMIND

The member originally joined because they saw value in membership

ENGAGE

Keep the member engaged so that they believe in the value of continued membership

ENGAGE MEMBERS

RETENTION BEGINS THE MOMENT A NEW MEMBER JOINS!!



- Work with CTTC to ensure chapter events engage all members
- Invite members to chapter board meetings
- Know your members and recognize them i.e. Congratulate new PE/PEngs
- Support engagement of YEA and Student members
- **Ask for feedback!**

MP CHAIR TASKS TO IDENTIFY

RUN REPORTS MONTHLY

- Track members who are in Grace or approaching renewal
- Review delinquencies at BOG meetings



CONNECT WITH MEMBERS

- Ask why they have not renewed
- Ask why they have cancelled
- Provides options and solutions



FORM A RETENTION SUB-COMMITTEE

- Share the workload!

MP CHAIR TASKS TO ENGAGE

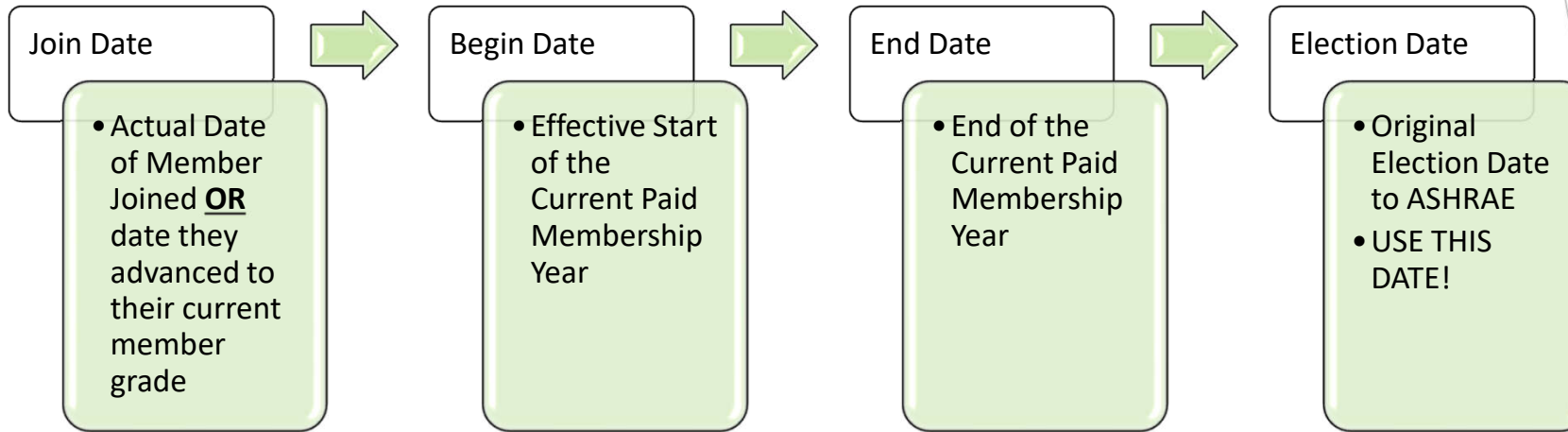
RETENTION CALLING CAMPAIGNS!!

- Focus on 90-180 days past due first
- Split up the list
- Call or email each member
- Use Weebly – template scripts/emails
- Be prepared:
 - Know benefits of ASHRAE, latest advancements, upcoming local events, etc.
 - Instructions for helping members renew
 - Offer to email link to renew



TRACK YOUR SUCCESS!

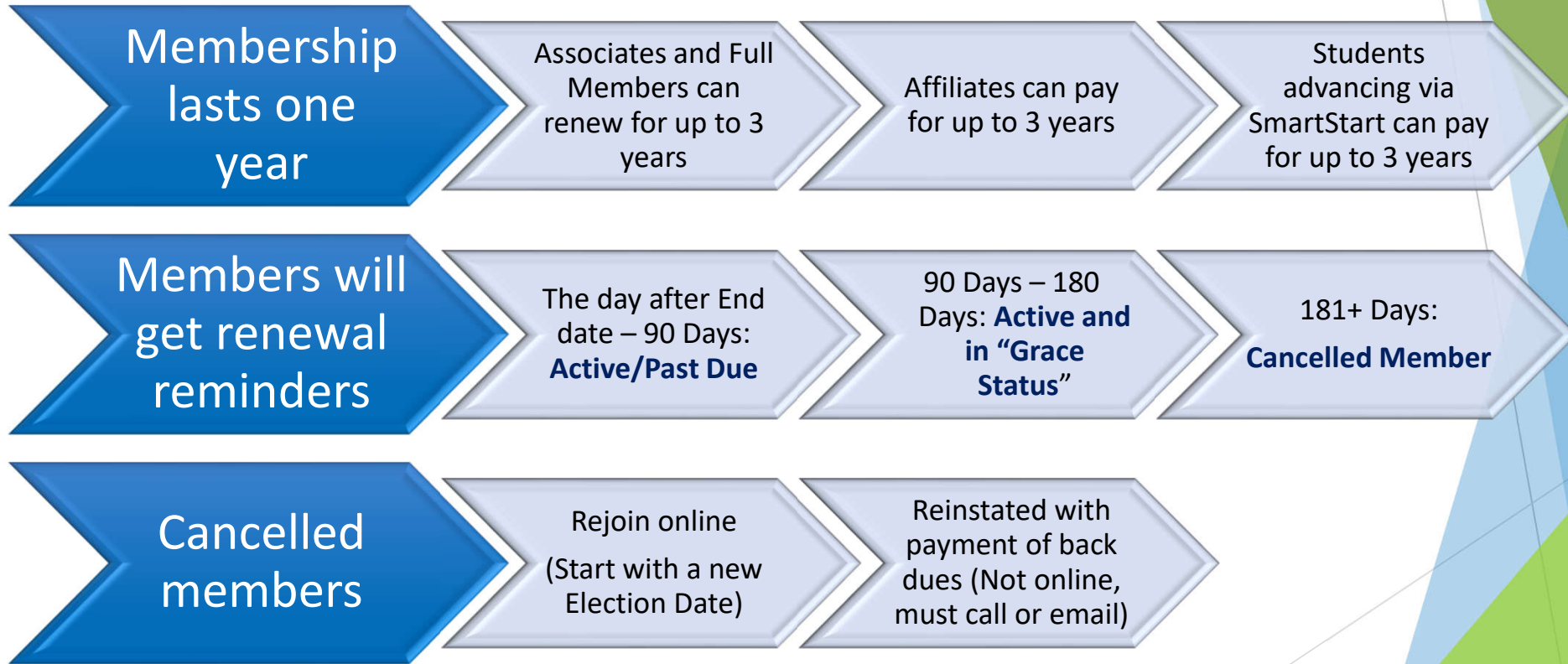
MEMBERSHIP CYCLE



Example:

Member No	Member Type	Join Date	Begin Date	End Date	Election Date	Member Status
1234567	Full Member	2010-04-14	2020-05-01	2021-04-30	2010-05-01	Active
2345678	Associate	2011-01-10	2020-02-01	2021-01-31	2011-02-01	Active

MEMBERSHIP CYCLE



PRESIDENTIAL AWARD OF EXCELLENCE

Presidential Award of Excellence (PAOE) is a system established to assist effective chapter leadership and performance.

- Sets minimum standards/expectations to help drive success
- Supports the Presidential Theme
- Drives friendly competition between chapters
- MP PAOE points have been updated for this year!



PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

- Points should be entered throughout the year, as applicable
- Use the PAOE points as a guideline for chapter success
- Some points are assigned by the RVC. Work with your RVC to ensure that you earn these points
- Some points are automatically assigned electronically
- Be honest!

MINIMUM – 1,000 POINTS

PAR – 1,600 POINTS

MAXIMUM – NO MAX!

PAOE-MP (2023-2024)

Efficient use of volunteers' time:

MP1	25pts/month (300pts max.)	If Society membership delinquencies in chapter are 5% or less of total Chapter Area Assigned Members at the end of each month
MP2	200pts (600pts max.)	For specific organized MP event (e.g., member bring a member, recruitment/retention calling campaigns, presentations to promote membership, visit to employers)
MP3	100pts (300pts max.)	For each separate social event, separate from events under MP2, with a membership promotion or appreciation component
MP4	25pts (250pts max.)	For each 10% of total new members retained (dues paid second and third year)
MP5	50pts per member (300pts max.)	For each member who rejoins or is reinstated after being cancelled
MP6	5 points (50 pts max.)	For recognition of new members and advancements at each chapter meeting
MP7	10pts (150pts max.)	For each non-member invited and who attends a chapter meeting (10pts for each individual)
MP8	50pts (50pts max.)	If MP chapter committee chair and chapter officers are comprised of individuals that report 3 or more different industry classifications
MP9	100pts (100pts max.)	If MP committee is comprised of at least one YEA or female member
MP10	150pts (300pts max.)	If Chapter hosts an employer recognition program or presentation at a Chapter meeting that awards/recognizes employers who support ASHRAE membership by paying membership dues
MP11	100pts (100pts max.)	For establishing and maintaining a chapter Diversity, Equity, and Inclusion committee with a member serving as chair

PAOE-MP (2023-2024)

RVC Assigns/Enters the following points:

MP12	50pts; (no max. pts)	50 points per 0.5% growth in membership at the end of fiscal year above starting point
MP13	100pts; (100pts max.)	For the incoming Chapter Membership Promotion committee chair or co-chair attending the MP CRC workshop
MP14	100pts; (100pts max.)	For the incoming Chapter Membership Promotion committee chair or co-chair attending the MP centralized training
MP15	50pts; (100pts max.)	If Chair or Co-Chair have been on the committee for 2 years or more
MP16	50-100pts; (100pts max.)	For planning and goal setting session with RVC and chapter MP committee members
MP17	10-100pts; (100pts max.)	For achieving goals established in goal-setting session with RVC (points assigned by RVC by June 30)
MP18	25pts; (100pts max.)	If Membership Promotion Committee size is 5 or 3% of chapter members (whichever is less as of June 30*) with dedicated committee members serving as the Recruitment Chair, and/or Retention Chair

Note: All reports are run on or around July 2nd for the June 30th results.

PAOE-MP: KEY ISSUES

- ▶ Chapter MP Committee:
 - ▶ MP committee and chapter officers from different industry classifications
 - ▶ MP committee is comprised of at least one YEA or female member
 - ▶ MP committee size is 5 or 3% of chapter members with dedicated Recruitment and/or Retention Chair
- ▶ Recruitment:
 - ▶ Specific organized MP events & separate social events
 - ▶ Member who rejoins or is reinstated after being cancelled
 - ▶ Invite non-member to a chapter meeting
- ▶ Retention:
 - ▶ Society membership delinquencies in chapter
 - ▶ Total new members retained (dues paid second and third year)
- ▶ Recognition & Diversification:
 - ▶ Recognition of new members and advancements
 - ▶ Employer recognition program or presentation
 - ▶ Establish and maintain a chapter Diversity, Equity, and Inclusion (DEI) committee

CHAPTER DIVERSITY, EQUITY, AND INCLUSION (DEI) COMMITTEE

From the Manual of Chapter Operations:

Raise the awareness of diversity and inclusion within the chapter. The DEI Committee will foster locally, Society's commitment to a diverse and inclusive membership. The chapter DEI Committee will operate with the following goals:

- Work with the MP Committee, Student Activities and YEA Committees to attract and retain diverse members that represent the communities within your chapter.
- Coordinate with CTTC to provide programs and organize activities focused on attracting and retaining diverse members from all segments of the industry.
- Promote inclusion and a diverse volunteer experience.
- Create a network for professional growth.
- Build diversity awareness and sensitivity within the Chapter.

PAOE-MP AWARDS

BLUE RIBBON AWARD

Chapter MP Chair with highest MP PAOE points in the region

RED RIBBON AWARD

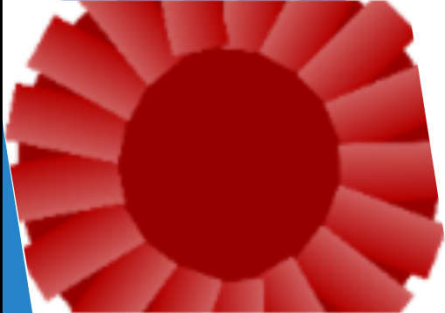
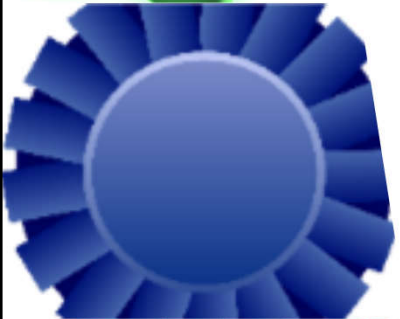
Chapter MP Chair with second highest MP PAOE points in the region

LIMELIGHT AWARD

Chapter MP Chair with the highest net positive growth on a percentage basis

BOOMERANG AWARD

Chapter MP Chair with the highest non-student membership retention rate on a percentage basis



LINCOLN BOUILLON AWARD

- Established in 1967 in memory of President Lincoln Bouillon
- Recognizes the member who performs the most outstanding job in increasing the membership of the Society
 - Increasing chapter membership
 - Reducing the number of delinquent members
 - Increasing the number of members who advance
- Recommended by MP Committee

**This could be
YOU!!!**



PLANNING FOR SUCCESS

- Start planning early!
- Attend Centralized Training and Region CRC Workshop
- Establish Co-Chair & Committee in the summer
 - Recruit YEAs, new members, etc.
 - Meet to discuss ideas
 - Assign roles – Recruitment Chair, Retention Chair, etc.
- Understand Reports
- Review previous year's membership data
 - New members
 - Cancelled members
 - Review demographics - where do you need to diversify?

REGION XIII 2023-2024 MP GROWTH GOALS



	Start Total	Goal	Net Growth Goal	Year End	Goal Met
Hong Kong	732	15	747		
Indonesia	87	2	89		
Japan	192	4	196		
Macau	61	1	62		
Malaysia	217	4	221		
Philippines	162	3	165		
Singapore	317	6	323		
South Korea	89	2	91		
Taiwan	139	3	142		
Thailand	81	2	83		
[Sub-total]	[2077]	[42]	[2119]		
CAR ASHRAE Beijing	11	---	---		
CAR ASHRAE Shanghai	23	---	---		
Region XIII - Other	493	---	---		
Region XIII TOTAL =	2604	---	---		

1. Total includes paid and unpaid members, and does not include students.
2. Goal for new members is set at 2%.
3. Net growth goal to reach by year's end (does not include students).



PLANNING FOR SUCCESS

- Read the PAOE Newsletter!
- Schedule a Planning Session with your RVC before October 1st (PAOE points!)
 - Prepare your MBOs and review them monthly
- Understand Growth Goals
 - Determined by ASHRAE and your RVC
 - Net Growth Change = New Members – Cancelled Members
 - + Transfers in – Transfers out
- Check in regularly with your RVC – **we want to hear from you!**
- **Plan Early!!**

SCHEDULE YOUR MP NIGHTS

- Schedule minimum two (2) MP nights
 - First by November
 - Member bring a Non-Member Night
- Offer door prize or hold a prize raffle
- **Recognize** new & advanced members
- **Recognize** employers who support ASHRAE membership
- Presentation to promote membership
- Have a computer to sign up new members online
- PAOE – 200 pts/event



EXECUTING THE PLAN

Don't try to do it yourself!

- Work with your CTTC chair / board to ensure you have programs that attract new members and keep existing members engaged
- Get members involved!
- Use the monthly task checklist as a guideline
- Take advantage of special events as recruitment opportunities (ex. Golf Tournaments, Holiday Parties, etc.)
- Take advantage of the available resources
- New Member orientation



WORK WITH YOUR SA & YEA CHAIRS

- Attend SA and YEA events
- Engage graduating students & encourage Smart Start
- Understand YEA Programs:
 - Leadership Weekend 1.0 & 2.0
 - LeaDRS
 - Leadership U
 - YEA Leadership International
 - HVAC Design Scholarship



MEMBERSHIP STAFF



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WEBSITES

MP in ASHRAE Region XIII

<http://ashrae-region13.org/MP.htm>

MP Events, News
and Resources

MP Training Central

mptraining.weebly.com

REMEMBER THIS ONE!! TONS
OF USEFUL MP RESOURCES!!!

ASHRAE

www.ashrae.org

MP REPORTS
FOUND HERE!!

Facebook

<https://www.facebook.com/ASHRAEupdates>

ASHRAE NEWS &
EVENTS!

ASHRAE Marketing Central

www.ashrae.org/marketing

TOOLKITS &
SWAG HERE!

Thank you!

