

ASHRAE Leadership Recall (formerly Leadership Recalled)

Transcription

Interview of: George Menzies

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Interviewed by: Herb Maybank

Herb Maybank

It's Monday, June 23 at Portland. Herb Maybank speaking for the Historical Committee. I'm interviewing George Menzies of Hamilton, Ontario who has just retired from ASHRAE Research Canada after many years of involvement and I'm now going to ask George to speak extemporaneously off the cuff to describe how he got involved in ASHRAE Research Canada and what has transpired since he did in his own words.

George Menzies

Thank you very much Herb. It is a pleasure to be in a position at this time to discuss ASHRAE Research Canada, something that has been near to my heart since its incorporation, even prior to that, and being involved in it for 15 years.

Just to review back in 1971, I was a delegate to the CRC in Quebec City, at which time Hay Murray was the vice chairman for Research Promotion for Region II. At that time CRC realized that Canadian members, Canadian industry, and businesses did not have the same benefits as Americans in investments of ASHRAE research. They are not deductible on our tax returns. Because we did not have that benefit, very few funds were being raised in Canada. In fact, during the course of 1971, less than \$300 was raised in Canada. We challenged Hay Murray at that time that the only way we would be able to get deeply involved in a fund raising campaign throughout Canada is to have that deductibility status. Hay took that idea and with John Fox and Jake Clausen the three of them got their heads together and Hay then spearheaded a campaign through our ASHRAE Montreal lawyers and created and incorporated, a corporation called ASHRAE Research Canada. It was incorporated in Quebec on June 8, 1972. That incorporation then allowed contributions or investment in research in Canada to become deductible for those individuals carrying on business in Canada. With that, in the 1972-1973 fiscal year, we then raised \$20,000. We went from a few hundred to \$20,000, so obviously this was a vehicle which was going to work. Since that period of '72 and '73, the first year, we have now raised something on the order of \$50,000 to \$60,000 a year for investment in research in Canada. Well, the key is that it has to be spent in Canada. You raise the money in Canada, you spend the money in Canada. Over the period since incorporation we have now spent close to \$600,000 in Canada on ASHRAE research. We have had research at universities from the east and the west, from Edmonton University, University of Alberta, we have had McMaster University in Hamilton, Concordia in Montreal, University of British Columbia, University of Manitoba, there are some major projects there, University of New Brunswick, University of Saskatoon, Saskatchewan, University of Western Ontario, and the University of Windsor. So we have

had research virtually throughout Canada in the period of the last 15 years. In that same period we have raised just short of \$600,000 for this investment in Canada. So we have never actually caught up to the amount being spent. Virtually every dollar that is collected in Canada is spent in Canada. That's important for the members to know. During this period from 1972, for the first three years, Hay Murray was president of the corporation. He was followed by Bev Neal over the next few years and then by a very familiar Canadian member, John Ross. In 1981, John Ross retired and I took over and I have been the president for the last five years until the annual meeting in May of this year at Niagara Falls when Dennis Kisselbach from Vancouver, British Columbia, took over as president. It 's interesting in those 15 years I was involved as the delegate to the CRC. Less than a year later ASHRAE Research Canada was incorporated. In those next three years I was vice chairman of research for promotion for Region II and at that time that was virtually all of Canada except BC. So I was involved in the fund raising then under Hay Murray for those next three years. That followed when I became Regional Chairman for Region II.

H.M.

Was Hay Murray the Regional Chairman while you were vice chairman of Research promotion?

G.M.

No. For the first three years he was president of ASHRAE Research Canada. He was the inaugural president and held that capacity for three years. Under him, I was the vice chairman raising money. In that period we raised almost \$100,000 in those first three years, so we knew we were on the right track. Then I followed that being Regional Chairman for Region II, which I then had Al Oaks and Paul Conrad under my wing as Vice Chairman. All three of us were involved, again under Bev Neal as president of ARC, working trying to raise funds. So I was again involved in the fundraising aspect. At the chapter level, I was involved as a fundraiser and chairman of the Research Promotion Committee for the Hamilton Chapter. I have been on that committee since 1972. Then, when John Ross took over, I became involved in ASHRAE Research Promotion and ASHRAE Research Canada, principally as a fundraiser in Canada. In '81, I was elected as the president of ARC and for the past five years been involved in that. It has been as interesting period of five years because we have looked very hard at the fact that we were a parallel organization to ASHRAE. We were incorporated and we were a separate corporation called ASHRAE Research Canada, which ASHRAE is also incorporated. So we really have two companies working here; two corporations working side by side. There was a question were we really going to become totally independent or become a Canadian arm of ASHRAE. While it was never intended when Hay Murray incorporated, we were intended to be strictly a corporation to be the vehicle to give the contributions the deductibility status. But in the last five years, because of the new regional setup, the new council setup, the society has grown immensely and the question came forth, ARC could hardly be just a small corporation. It has to be a spokesman for Canadian members. We reviewed whether we would continue it at all. Whether it became just an arm of ASHRAE that wasn't needed because as ASHRAE moves into international flavor, Hong Kong, United Arab Emirates, should we have that kind of incorporation in each of these countries? Would we have a proliferation of these corporations all over? Well, it has worked out that after careful thought we do need to stay but we need to have an affiliation agreement with ASHRAE. At the annual meeting in May 1986, the members in Canada passed an affiliation agreement so that we are directly tied to the society and that we really cannot operate totally independent. We are tried to all the rules and organizations that ASHRAE represents. We will be part of ASHRAE and will not be able to become an independent Canadian

organization. It has been an interesting five years for me because when I succeeded John Ross we were very organized from a political point of view in Canada. We have gone these strains of five years looking at ourselves and saying do we really need to exist, to the point where we are saying yes, we do. We do represent a unique feature for Canadian ASHRAE members that we don't want to give up. We really want that. However, we do need some constraints and we have this affiliation agreement to be tied to the society so that we can't become totally independent, which really our letters of patent, were used for incorporation gave us that independence because the letters of patent were exactly the same as those that formed the society, except that they were out of New York and were out of Montreal. Anyway, it has been an interesting 15 years. I am going to miss the action because you get involved in both the awarding of contracts, research contracts in Canada, reviewing the various potential projects that come forth out of Canada, bidding list right through to the fundraising, getting involved at the chapter level coast to coast. Because of the new regional setup we just operated throughout Region XI and Region II, and if the proposed realignment where we have in theory for regions of which Canadian chapters might be present. Again, it gives you that Canadian flavor regardless of the chapter and regional set up. So it has been a very exciting and, and for me, a very personally rewarding 15 years when I got to meet so many people. So it is with a lot of regret I am going to miss the organization, although I think I will always be involved at the chapter level.

H.M.

ASHRAE Research Canada does provide that tie that we feel we need in Canadian chapters so there is a common thread running through them.

G.M.

Perfect. That is well said and the fact of life. Government Affairs, there are other committees and subcommittees that have not been able to bring out that thread that you described and ARC has that. It is amazing the common bond we have, chapter, and cities throughout the country, and the ASHRAE membership and how we can utilize ARC as that vehicle to give that bond. I am sure we are going to need not only now but if we have this new setup in the future it will become even more important.

H.M.

You mean where they have more a north/south orientation between chapters along the Canadian border being connected with chapters closer in a north/south direction in the States.

G.M.

Trying to group chapters geographically regardless of the borders so that the regional chairman can operate more effectively within that geographical area.

H.M.

So ASHRAE Research Canada can maintain that Canadian thread we speak of the ties between our Canadian chapters so they don't get totally separated.

G.M.

Right. With ASHRAE and research, that is what ASHRAE is all about, is developing new concepts and ideas and standards. It just ends up that because of ARC we will always have a Canadian flavor.

H.M.

Looking at the historical concept of ASHRAE Research Canada nothing really happened in Research Promotion fundraising in Canada because individual and businesses, I am speaking of self employed individuals and businesses, could not use the contributions prior to that time until there was a tax

arrangement made the government that this money was going into a Canadian corporation for research only. That really was the start of the significant increase. We pretty well covered the historical from back there. How about some comments from you as to what you see in the coming years, thoughts or recommendations as to our future course of action.

G.M.

In the future years, as I see it right now, I don't expect a major change in the philosophy of the corporation. Hopefully the Canadian universities and institutions will be interested in bidding on ASHRAE research. From the current list we have probably in excess of 200 projects that need to be underwritten in the next few years. All of those 200 projects are available to be bid on by the Canadian institutions such as the universities and other operations.

H.M.

Such as Ontario hydro who have had some minor promos – Have had a \$ 31,000 grant from ASHRAE research.

G.M.

So we have many projects that need to be underwritten. We have in excess of 30 bidders from Canada, invited bidders to bid on these projects. I feel there will be a continual need for research to be done, certainly we are favored with a dollar situation right now where we can bid against the United States and provide the equipment available. We do have a good bid. You will see the research coming north. With the research coming north it is to our benefit to underwrite a lot of that research with money out of Canada. Although it appears we will likely see our expenses in Canada on these projects still exceed our contributions. I don't think we will ever see it the other way but it could happen. And the incorporation requires us to spend 90 percent of what is raised in Canada in Canada. That has never been difficult to meet as we do spend generally more in any year in Canada than we do raise. I visualize in the next 10 years or beyond that not a real significant change in our patterns since '72. As you mentioned, prior to '72, we didn't succeed in raising funds while the Americans at that time had raised in excess of \$100,000. We were a few hundred dollars, so obviously there needed to be change. They are now reviewing the overseas and international aspect. How can we get the other countries involved. And I know in the last 18 months there has been a project underwritten in an overseas country, I believe either in England or the British Isles. There are now projects being underwritten by ASHRAE as a society in other parts of the world. We will get involved with international members underwriting those projects. But certainly for Canadians ARC has, well I don't like to say it, is a necessary evil, but it has certainly created the vehicle necessary to get Canadian participation. And has had the side benefit of tying all the Canadian chapters together so it has really been to the benefit of the chapters to have this incorporation.

H.M.

And the benefit of ASHRAE overall.

G.M.

Right, so it has worked out to be one of the most unique experiences to see an incorporation, in theory called a paper corporation, and yet it has worked out to be one of the strongest vehicles for Canadian ASHRAE members to have a Canadian flavor and a Canadian reason to be part of ASHRAE and see these projects underway in Canada and get these people involved in those projects. It has been exciting. Our TCs, technical committees have benefitted.

H.M.

George, thank you very much for your comments. I look forward to your continued participation. Because you're too young to give it up altogether. One comment I would like to make and that is that it seems to me that the effort at the chapter level in looking at the monies raised at the various chapters, some chapters have the methods together for doing a good job and some chapters do not. It seems to me that this is an area that ASHRAE members and those interested in ASHRAE Research Canada are going to have to work on.

G.M.

You are right. It is both gratifying and at the same time you see sadness in chapter performance coast to coast. Small chapters like Regina with their couple of dozen active members raising thousands every year, early and successfully and no significant change year to year. They get their thousands raised. Larger chapters, British Columbia, Montreal, and Toronto have difficulties year to year. The pattern is unbelievably different. One year they raise 10 to 20 thousand. Other years they raise two to three. You can't explain it other than within the chapter the operation is just not organized or isn't effective and it is very likely that the committee is not large enough to handle the needs of a large chapter. Two or three individuals in that chapter attempt to run the campaign on their own with dedication and a lot of hours. They work at it, but they just don't have the team necessary to cover the numbers of businesses that are within that area. That is the topic that will certainly have to be addressed in the next few years. That is, the performance level of the large chapters. That is not unlike the situation in the States. New York is one of the principle chapters that has had difficulties, and there are many others. I shouldn't single out New York, but many large chapters in the States have had the same problem. They just can't put it together and have it work effectively. You get a small chapter like Regina.

H.M.

Or like Austin, Texas, where the chapter won the award today.

G.M.

Good.

H.M.

It went from \$4,000 to \$6,000 to \$12,000 this last year.

G.M.

So we know that the smaller the chapter that seems to be more effective, but I am sure that it is the fact that they get the whole chapter involved. In a large chapter how do you get everybody involved? Yet that is what is needed if ASHRAE is going to progress in the future, we need more involvement not only by all the members but by all the businesses that are benefitting from all the research.

H.M.

OK Thank you very much.

Editorial Note: Additional comments by Mr. Menzies about paperwork being provided to Mr. Maybank follows.