MEMBERSHIP PROMOTION COMMITTEE
MINUTES
From the meeting of Saturday, January 21, 2012, Chicago, IL

Members Present
Russell Lavitt
Roger Jones
Richard Vehlow
Cathy Godin
Gary Debes
Bryan Holcomb
Douglas Fick
Mark Miller
Frank Schambach
Randy Schrecengost
Gaylen Atkinson
Marites Calad
Murdoch MacPherson
Jason Alphonso
Eric Panzo
Dimitrios Charalambopoulos
Jim Fields
Samir Traboulsi

Guests
Devin Abellon
Kevin Marple
Douglas Zentz
Andrea Zarour
Vasiliki Galiotou
Rich Rose
Ashok Virmani
Rami Alkhalil
Mike Cleary
Erich Binder
Cindy Hyatt

Staff
Ashley Pruett

I. Call to Order, 8:06 a.m.

II. Approval of Minutes:
Committee approved the minutes from the June 2011 Montreal meeting via conference call on January 12, 2012.

III. New Business:
A. Chapter Chair Training & Development:
a. We are planning our Centralized Training for 2012-13, with a goal to kick off with our first training in San Antonio on Sunday of the Annual Conference. We appreciate support and guidance from Members Council in implementing this change. We believe bringing chairs to the conference with participants
from all regions including committee leadership will provide a great learning experience for our chairs, and expose them to ASHRAE in a much greater sense.

b. Staff is going to contact every chapter with no 2012-13 MP Chair listed by late April to ensure they get someone listed. We want to maximize participation in San Antonio from all regions.

c. Motion: Membership Promotion Committee recommends to Members Council that the 2012-13 budget be increased by 15.4k, (from 34.6k to 50.0k) for chapter chair travel reimbursement to have centralized training at the annual conference, to include an opportunity for some chairs in Region XIII and RAL to attend.

Background: We wish to maximize the training opportunity that an annual conference can provide. If we can get MP Chairs to the conference for a one-day registration, attending the Welcome Party, and fully trained, they will see the Society aspect of ASHRAE and be better advocates for the potential of the technical content and networking ASHRAE provides to members. An added benefit is timely training for incoming RVCs as they will already be attending the meeting. We see this as a win-win for the chapters, the chair, and Society. We plan to work with CEC on a special one-day registration pricing and special welcome party ticket pricing for those chairs who attend. In regards to Regions XIII and RAL, while it has been thought to be cost prohibitive to include them in centralized training, they need the Society exposure and the opportunity to be trained equally amongst their global MP peers. Fiscal impact: $15.4k. Vote: Unanimous.

B. Dues & Applications:

a) As of December 31, 2011, Society membership was 52,641 (Member paid: 42,342; Member unpaid: 3,817; Student paid: 4,487; Student unpaid: 1,995). As of December 31, 2010, Society membership was 51,980 (Member paid: 42,200; Member unpaid: 3,465; Student paid: 4,319 Student unpaid: 1,996).

b) The December 31, 2011 membership dashboard serves as ATTACHMENT A.

c) The developing economies membership program is in its fourth year. In July 31, 2008, just after it began, there were 135 members participating. As of December 31, 2011, there were a total of 957 members participating, down by 82 from the same time last year (1,039). We will keep close watch on the program if any further decrease in participation occurs to identify reasons for a decrease.

d) The D&A Subcommittee will be working to develop a new member get-a-member program to encourage local chapter persons to recruit new and renew existing delinquent members. The former program was manual and not user friendly, and only focused on rewards for recruiting new members. We hope to include a renewal/delinquent member component to incentivize them for retention efforts as well.

C. Member Communications:

a. We are continuing our monthly training email newsletters to all chapter MP Chairs and presidents.
b. We are encouraging ASHRAE to investigate the possibility of using text messaging for communicating with members only if they wish to communicate that way for such things as events and membership.

D. Recruitment & Retention:
   a. In support of MBO #1, we are working on creating effective marketing/messaging campaigns for small, medium and large companies for design, contracting and sales/manufacturing, with a goal to be able to encourage individuals and companies directly based on their makeup and industry, on the long-term benefits of ASHRAE membership and participation. The MP committee is also reviewing the effects of generational change and its impact to membership recruitment and retention.
   b. The long-term goal is to grow ASHRAE membership to 55,000 by the end of 2014-15. The 2011-12 year began with a total of 52,900 members, with the net growth goal for 2011-12 of 525, for a total 2011-12 goal of 53,425. We need to grow just under 1,000 members by June 30, 2012 to meet this goal.
   c. Membership campaigns in 2011-12 targeted at membership growth:
      i. Invitation to join to:
         1. All AHR Expo attendees who were scanned at the ASHRAE booth
         2. Cancelled members (to rejoin) from Ron Jarnagin similar to the Bellenger campaign done last year
         3. All non-members who became ASHRAE certified, took courses, or purchased products/events directly through ASHRAE.org
      ii. An “invitation to opt in” to receiving ASHRAE membership information to all non-members who have purchased in the ASHRAE Online Store through TechStreet
   d. The priorities for recruitment and retention are attaining new members and retaining current members. New programs:
      1. A new member notification process this year, where MP Chairs are sent an email with each new member who joins, and SA Chairs are sent an email with each new student who joins
      2. We hope to set up a new email notification system for MP Chairs when their members become lapsed

E. Regional Report Highlights. ATTACHMENT B.

F. Liaison Reports:
   1. Student Activities Committee (SAC) January 20, 2012, Alphonso
      i. Discussion on how to properly define the student transfer metric i.e. students to member upgrade.
         1. It is currently projected to be very low (appx. 5%). The discussion was centered on how this number, while numerically true, is not directly indicative of the efforts or lack thereof of the SA and MP committee. SA will work on providing other supporting metrics.
ii. Discussion on further empowering the faculty advisor. Ideas include providing an incentive to the faculty advisor for increasing student transfers through the "Smart Start" program.

2. Young Engineers in ASHRAE Committee (YEA) January 22, 2012, Jones
   i. YEA Leadership Weekend San Diego, March 30 – April 1
   ii. YEA/MP/SA Ad-hoc Committee on increasing student transfer rates was started this fall.
   iii. The YEA committee is looking ahead and starting to fully develop a 5-year plan recognizing that increasing YEA membership numbers is one of the highest priorities. YEA is also working with Tom Watson on developing a plan for addressing generational differences within the demographics of potential ASHRAE members.
   iv. YEA Regional Coordinators (YRC) will encourage chapter chairs to establish contact with the MP-RVC and obtain report on current number of YEA eligible members in region (by chapter).
   v. Mentoring: Promote career development for members by identifying YEA Chapter members interested in participating and connecting them with the ASHRAE mentorship program.
   vi. PAOE for Senior Sendoff SA collects graduating seniors' contact info to urge transition from Student to Associate member.
   vii. Atlanta Chapter Motion:
       1. That Honors & Awards Committee create an award to recognize outstanding leadership efforts and other contributions to ASHRAE by YEA (Young Engineers in ASHRAE) members where 2 members would be recognized each year.
       2. It would be appropriate to recognize these select YEA members for their efforts and contributions to the society at a young age. Doing so will allow them to be acknowledged among their peers and encourage meaningful involvement from other YEA members.

IV. Old Business:
   A. Response to Referrals/Action Items from Members Council:
      1. Motion 40 (11/5/11) – Lebanese Chapter:
         That student membership be offered for free the first year after graduation and then raised gradually to cover the total amount required by the “SmartStart” program over three years (120$).

         Background: Graduating student retention rates seem to be very low. Offering free affiliate membership the first year after graduation to all graduating student members may be considered as a token of appreciation from the society towards its student members and may push them to stay in contact with society issues. A scheme that might work is $0+$40$+$80$ before shifting to the full member status with the regular fees. Fiscal Impact: None.
Response to Members Council: MP is working with Student Activities on a response to this. Initially, there are some concerns that offering free membership won’t make much of a difference, since the first year of the Associate membership is only $20 and includes full benefits.

2. Motion 41 (11/5/11) – Lebanese Chapter:
That Student Branch Advisor membership entitles its holder to the same privileges as granted by his/her original grade.

Background: Student branch advisors are the backbone of student membership and the first contact of the society with students at a local scale. Growth in terms of student membership is highly dependent upon advisors’ commitment to society activities and the student members are the future of the society. Advisors’ efforts are to be recognized in a way or another and the simplest reward is to consider them as regular members and not as student members. Fiscal Impact: Minor due to the limited number of S-B-A members. During the Members Council Fall Meeting in Atlanta, the council referred the motion below to the Membership Promotion Committee with a suggestion that MPC get feedback from the Student Activities Committee. If you have any questions, please feel free to contact me. Thank you.

Response to Members Council: The Student Branch Advisor has always retained their original grade of Member or Associate, they are just coded as SBA Member or SBA Associate for the purpose of identifying them with Society. The only difference is that their $20 membership doesn’t include a Handbook, but they are given the student discounts on the Handbook of $49.

3. Motion 35 (11/5/11) – Hong Kong Chapter:
That ASHRAE Headquarters to provide options to allow new and current Student Members to pay membership fees for multiple years (say, 2, 3 or 4 years) and attract them to do so at a discounted rate. For example, the discounted membership rate may be like this:
- 1 year membership = US$20
- 2 years membership = US$20 x 2 x 0.8 = US$32
- 3 years membership = US$20 x 3 x 0.7 = US$42
- 4 years membership = US$20 x 4 x 0.6 = US$48

Background: In the past, many Student Members experienced problems with annual membership renewal because they cannot receive the renewal notice or the renewal procedure was overlooked. The problems have led to many cases of delinquency or compliant. Also, the yearly membership renewal of Student Members requires much administrative efforts and is not cost effective. It is better to allow Student Members to pay one-time for multiple
years or for the whole duration of their study at the institution. By doing this the problems with annual student membership renewal can be eliminated and the related administrative efforts can be reduced. This will improve the services and effectiveness of membership management for Student Members. It also could reduce the costs of the Society in the long run. Fiscal Impact: To be ascertained by the Society.

Response to Members Council: Not feasible with advertising regulations to create a four year membership. We ask the chapter to revisit and develop something based on three years and with a fiscal impact. We have also discussed this with Student Activities and would like more input from them as well.

4. **Action Item #2 (from Region I New York Chapter):**

   It was moved by Mr. Millies:
   
   (4) That the membership application be revised by deleting “If you know, please indicate your preferred local chapter,” to read: “Do you want to be assigned to the Chapter where you live, Chapter where you work, or other Chapter (indicate which Chapter). Check appropriate box.”

   Background: Because current application is not clear, many applicants who live and get their mail at home, or a state different from where they work, do not enter anything and are assigned to the chapter where they live, when in reality, they would prefer to be assigned to the chapter where they work. Fiscal Impact: None, except for possible minor reprogramming costs for online application. **MOTION 4 WAS DEFEATED.** (Unanimous voice vote, chair not voting). Action item created: AI 2, An action item was assigned to staff to determine if the paper membership application can be revised since the current online form defaults to opt-in and the chapter’s location is listed in the drop down box

   Response to Members Council: New applications with the logo were already designed prior to receiving this action item. With the next round of changes, we will incorporate a way for applicants to know the geography, name and cost of chapter so they can list it on their applications. There will be a system where they will go to the web and have a listing of chapter name, location and cost for each new member.

B. Membership Promotion Committee approved David Farala of the ASHRAE Philippines Chapter as our 2010-11 Lincoln Bullion award recipient, and forwarded our recommendation to Honors & Awards Committee.

C. Membership Promotion Committee has made several recommendations to the PAOE Subcommittee regarding 2012-13 to reflect the membership growth goals set
by the committee, as well as place a greater emphasis on recruitment and retention. ATTACHMENT C.

V. New Action Items, following January 21, 2012 meeting. ATTACHMENT D.

VI. MBO Update. ATTACHMENT E.

VII. Next Meeting
   A. Committee Meetings: June 22-23, 2012, San Antonio, TX (June 22 TBD)
   B. Centralized Training: June 24, 2012, San Antonio, TX

VIII. Adjournment, 2:38 p.m.

Respectfully submitted,

Russell Lavitt, Chair
ASHRAE Membership Promotion Committee

Last updated March 15, 2012
**Total Full Members (Associate & Member): 2010, 2011, 2012**

<table>
<thead>
<tr>
<th>Month</th>
<th>2009-2010</th>
<th>2010-2011</th>
<th>2011-2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan</td>
<td>39,566</td>
<td>39,768</td>
<td>39,461</td>
</tr>
<tr>
<td>Feb</td>
<td>39,524</td>
<td>39,524</td>
<td>39,524</td>
</tr>
<tr>
<td>Mar</td>
<td>39,614</td>
<td>39,566</td>
<td>39,461</td>
</tr>
<tr>
<td>Apr</td>
<td>39,668</td>
<td>39,566</td>
<td>39,461</td>
</tr>
<tr>
<td>May</td>
<td>39,768</td>
<td>39,461</td>
<td>39,461</td>
</tr>
<tr>
<td>Jun</td>
<td>39,768</td>
<td>39,461</td>
<td>39,461</td>
</tr>
</tbody>
</table>

| Previous Month | 53,080 |

**Total Members:** 52,641

**Membership Growth:** 769

**Cancelled Members:** 1,005

**Cancelled Students:** 203

**Net Change:** (439)

**Previous Month:** 53,080
## Membership Dashboard Legend

<table>
<thead>
<tr>
<th>Letter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Net growth: the total number of members compared to last month to include new members and cancellations</td>
</tr>
<tr>
<td>B</td>
<td>The total number of paid and unpaid members in the $185 dues category (Member &amp; Associate) for the last three years by month</td>
</tr>
<tr>
<td>C</td>
<td>The total number of paid members in each dues category for this month, last month, one year ago, and as a 12-month average, to include overall delinquents</td>
</tr>
<tr>
<td>D</td>
<td>The total number of paid and unpaid members in each industry area</td>
</tr>
<tr>
<td>E</td>
<td>Top membership countries in ASHRAE to include the total number of paid and unpaid members and students outside the USA</td>
</tr>
<tr>
<td>F</td>
<td>Total membership comparison of North America versus international</td>
</tr>
<tr>
<td>G</td>
<td>The total number of paid and unpaid members and students in each region, to include largest regional percentage and number growth</td>
</tr>
<tr>
<td>H</td>
<td>The total number of all members versus the total number of $185 paid and unpaid members for the last nine years (at the end of the fiscal year &lt;6/30&gt; for 2003-2011, and YTD for 2012)</td>
</tr>
<tr>
<td>**</td>
<td>During the 2006-2007 fiscal year, you see a large drop in membership. When ASHRAE converted to NetForum, we learned of approximately 5,000 duplicate membership records, which affected the overall total of membership. It is assumed membership values were not accurate before that year, and that year was a benchmark for our true membership. Also that year, ASHRAE went from 12 months of grace (past due) before cancellation of membership to six months of grace before cancellation. These two changes explain the drastic change in membership during that fiscal year.</td>
</tr>
</tbody>
</table>

* Comparing delinquent numbers from month to month, an increase, yielding a positive value (example: current month 3,000, previous month 2,500) is not a “good” change. Growth in paid totals as a positive value is good. Growth in delinquent totals as a positive value is seen as negative.

**
Regional Report Highlights

Region I (Richard Vehlow)

- 2011 CRC (NYC) had 10 of 15 chairs present, with another 3 officer “stand-ins”.
- Region 1 growth was approximately 1.5% in 2010-2011 so I set that as a realistic goal for 2011-12. As of the end of December, region had a 1.4% increase
- Created YEA Liaison

Region II (Cathy Godin)

- The CRC (Quebec City) 100% participation of chapter representative; actual MP chairs 7 of 9 (77%)
- Chairs were 50% experienced and 50% newcomers
- Created “YEA RVC” position

Region III (Gary Debes)

- 8 out of 12 MP Chapter Chairs attended the CRC (Scranton, PA) workshop and 10 chairs attended the Centralized Training in Atlanta. All together all 12 chairs attended training sessions. I have received MBO’s from all chapter chairs and conducted goal setting sessions with all as well.
- Net growth is low, flat or slightly up with the Region as a whole up only 1.5%

Region IV (Brian Holcomb)

- CRC (Myrtle Beach, SC): 5 of 7 MP Chairs attended
- Centralized Training: 5 of 7 MP Chairs

Region V (Doug Fick)

- 4 chairs attended CRC (Indianapolis) MP Workshop
- 5 chairs attended Centralized Training
- The growth goal for the region is 2% and the actual growth was -1.16%. Up from last year’s growth (- 3.39%).

Region VI (Mark Miller)

- Wisconsin Chapter is planning a principle’s breakfast in February and has been following up on delinquent members.
- Madison Chapter held a Membership Promotion night, with announcing new members and recognizing years of service.
- Monthly Membership Promotion reports and the Society Dash-Board has been sent to the Membership Chairmen monthly, along with a e-mail highlight, bringing forth goals of the region.
Region VII (Frank Schambach)
• Jeff Gatlin (DRC) set an ambitious net growth goal for the Region at 10% or 187 new members. Frank is working closely with the MP Chairs to reach this goal.
• CRC Workshop (Lexington, KY) 14 attendees of which 6 of 13 MP Chairs.

Region VIII (Randy Schrecengost)
• 9 Chapters have submitted newsletters
• 6 submitted MBOs by deadline
• Spring CRC is scheduled for April 26-28 in Tulsa. MP Chairs have showed strong attendance in the past and are encouraged to make their plans now

Region IX (Gaylen Atkinson)

Region X (Marites Calad)
• CRC (Scottsdale, AZ) 17 attended the workshop (up from last year) 5 were MP Chairs
• 4 chairs attended Centralized Training (RVC-MP correspondence increased from these chairs who attended Centralized Training)
• 4 chapters have positive net growth

Region XI (Murdoch MacPherson)
• 11 out of 12 MP Chairs attended the CRC workshop (Portland, OR)
• Growth Goal: 6 of 12 chapters showing net positive growth and Region is at 73 net new members – well on their way to a goal of 126 (58%)

Region XII (Jason Alphonso)
• All 11 chapters received MP training. 10 attended CRC training and one attended Centralized Training
• All 11 chapters completed their MP planning session before October 1
• Growth Goal: Net positive of 5 versus goal of 38

Region XIII (Eric Panzo)
• CRC (Hong Kong) MP Workshop was attended by 20 Participants including 6 MP Chairs
• Growth Goal: 17 net new members since July 1, 2011

RAL (Dimitris Charalambopoulos)
• CRC (Abu Dhabi) 2 Workshops were conducted with 16 of the 24 chairs attending
• Growth Goal for RAL 330 net increase (5.8%) versus goal of 3.5%. 14 of 24 chapters have achieved goal
• Two new chapters could also be formed under the right conditions
## 2011-2012 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

<table>
<thead>
<tr>
<th>CRITERIA</th>
<th>MINIMUM</th>
<th>PAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>300 points if annual chapter goal (as assigned by RVC) is met (50 additional points for each percent increase in area assigned member growth beyond annual goal)</td>
<td>500 Points</td>
<td>800 Points</td>
</tr>
<tr>
<td>200 points if Society membership delinquencies in chapter are 3% or less of total Chapter Area Assigned Members</td>
<td></td>
<td></td>
</tr>
<tr>
<td>75 points for organizing an employer recognition event to promote the benefits of ASHRAE membership for company members (maximum of two events)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>75 points for MP and YEA Chairs sitting on the Chapter CTT Committee to ensure chapter programs are developed relevant to the chapter membership</td>
<td></td>
<td></td>
</tr>
<tr>
<td>– Move this item to Chapter Operations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>50 points if committee size is 5 or 3% of chapter members (whichever is less)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>50 points for Membership Promotion Night at chapter meeting (100 points maximum)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25 points for retention of each new member (dues paid second and third year/300 points maximum)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25 points for chapter officers or MP Chair promoting ASHRAE membership to local companies (e.g. reception, one/one meeting, company presentation) in order to increase their support in ASHRAE (150 points maximum)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>– Move this item to Chapter Operations</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10 points for each upgrade from associate to member</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5 points for recognition of new members and advancements at each chapter meeting (50 points maximum)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### YEA Activities

- 50 points for each YEA Night (100 points maximum)
- 25 points for each new member in Young Engineers in ASHRAE (YEA) category (maximum 300 points)

### RVC Assigns

- 150 points for the incoming Chapter Membership Promotion committee chair attending centralized training
- 100 points for a MP Chair holding the position for a 2nd or 3rd year
- 75 points for planning/goal setting session with RVC (points assigned by RVC by October 1)
- 50 points for the incoming chapter Membership Promotion Committee Chair attending the MP CRC workshop
- 50 points for the first chapter in each region to reach PAR (points to be assigned by RVC and will be based upon the RVC reviewing points reported on the Society webpage and chapter contacting RVC when PAR is reached)
- 30 points for each pairing of mentors with new members and/or YEA mentees, and provide summary report to MP RVC on mentoring activities based on YEA Mentoring Program (300 points maximum, points assigned by RVC by June 30)
- 0 to 50 points for achieving goals established in goal-setting session with RVC (points assigned by RVC by June 30)
**CHAPTER CHAIR TRAINING & DEVELOPMENT SUBCOMMITTEE (FICK, CHAIR)**

<table>
<thead>
<tr>
<th>#</th>
<th>Assigned To</th>
<th>Action</th>
<th>Date Due</th>
<th>Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>ExCom to facilitate</td>
<td>Offer training sessions for RVCs on any questions or concerns they have. Begin as post-Montreal training in July, and repeat quarterly.</td>
<td>Ongoing.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Fick</td>
<td>Develop a list of all issues RVCs heard from chairs during the year to better tailor centralized training. Assign one person to task.</td>
<td>3/31/2012</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>RVCs, Staff</td>
<td>Call all chapters where the 2012-13 MP Chair hasn’t been listed on the CIQ yet to ensure they are complete.</td>
<td>5/31/2012</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Staff</td>
<td>Work with CEC staff to arrange a room for CT on Sunday in San Antonio with web access for running reports. Talk to Judy about some special price for the one day registration for MP Chairs who attend CT, and possible a special fare for the Welcome Party.</td>
<td>1/31/2012</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Fick</td>
<td>Ensure a plan is developed for fall 2012 centralized training content.</td>
<td>5/31/2012</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Jones</td>
<td>Ensure a plan is developed for fall 2012 centralized training logistics.</td>
<td>5/31/2012</td>
<td></td>
</tr>
</tbody>
</table>

**DUES & APPLICATIONS SUBCOMMITTEE (GODIN, CHAIR)**

<table>
<thead>
<tr>
<th>#</th>
<th>Assigned To</th>
<th>Action</th>
<th>Date Due</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Staff</td>
<td>Get lists of non-members who attended conferences of any kind, courses or took certification and do a member marketing piece to them.</td>
<td>12/31/2012</td>
<td>Ongoing.</td>
</tr>
<tr>
<td>2</td>
<td>All</td>
<td>Develop and create motion for a new member get-a-member program.</td>
<td>San Antonio</td>
<td></td>
</tr>
</tbody>
</table>

**MEMBER COMMUNICATIONS SUBCOMMITTEE (SCHRECENGOST, CHAIR)**

<table>
<thead>
<tr>
<th>#</th>
<th>Assigned To</th>
<th>Action</th>
<th>Date Due</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Staff</td>
<td>Annually promote all of the red, blue, green (and any other new awards) winners on the website by listing the names of the winners and the chapter for better recognition. Add to ASHRAE.org and blog.</td>
<td>8/31/2012</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Staff</td>
<td>Copy RVC on any communication with their chairs. Ensure Rhiannon Loomis does the</td>
<td>Ongoing.</td>
<td></td>
</tr>
</tbody>
</table>
### Membership Promotion Committee Action Items 2011-12

**Staff** Look into opting in to receive text messages and the legality of that as well as ways to capture opt-ins. 6/30/2012 Follow up email sent to Director of Operations on February 6, 2012.

**Schrecengost** Create content for February 2012 newsletter. 2/15/2012

**Staff** Design and send February 2012 newsletter. 2/19/2012

**Schrecengost** Create content for March 2012 newsletter. 3/15/2012

**Staff** Design and send March 2012 newsletter. 3/19/2012

### RECRUITMENT & RETENTION SUBCOMMITTEE (MILLER, CHAIR)

<table>
<thead>
<tr>
<th>#</th>
<th>Assigned to</th>
<th>Action</th>
<th>Date Due</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Schrecengost, Lavitt</td>
<td>Develop a consistent regional dashboard for region-to-region comparisons that is more communicative, and less metrics-driven. Utilize Isenbeck template and gain feedback from other RVCs. Lavitt to research previous work done (Salt Lake City).</td>
<td>3/31/2012</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Staff</td>
<td>Get a list of contacts from TechStreet to include what they purchased with all contact information. Plan various marketing efforts for membership based on purchasing. Is there a way to take what they paid and show them what they could have saved by being an ASHRAE member?</td>
<td>1/31/2012</td>
<td>In progress.</td>
</tr>
<tr>
<td>3</td>
<td>Miller</td>
<td>Consider a go to meeting on how to use available reports to generate leads for the local chapter chairs.</td>
<td>3/15/2012</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Staff</td>
<td>Ensure a mailing for the 2012 Expo attendees is done early, perhaps in February or March 2012.</td>
<td>3/31/2012</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Staff</td>
<td>Do another invitation to rejoin like we did with Lynn Bellenger from president Jarnagin.</td>
<td>3/31/2012</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Staff</td>
<td>Continue regularly scheduling action item #1. (Get lists of non-members who attended conferences of any kind, courses or took certification and do a member marketing piece to them.)</td>
<td>Ongoing</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Staff</td>
<td>Work with IT on the feasibility of sending emails to chairs when members lapse. Work with Tom on prioritizing over the chapter dues tracking program. Add the cancelled</td>
<td>6/30/2012</td>
<td></td>
</tr>
</tbody>
</table>
### Membership Promotion Committee Action Items 2011-12

<table>
<thead>
<tr>
<th>#</th>
<th>Assigned to</th>
<th>Action</th>
<th>Date Due</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Lavitt, Jones</td>
<td>Solicit subcommittee for any concerns regarding Committee training for RVC subcommittee roles.</td>
<td>Ongoing.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Jones</td>
<td>Coordinate some kind of new training for our incoming and returning RVCs (who wish to attend) at the annual conference to ensure the condensed meeting schedule doesn’t affect RVC training.</td>
<td>5/31/2012</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Holcomb</td>
<td>Discuss with MP, MBO #1, on how we can create a program that will be effective in growing company support and participation.</td>
<td>1/31/2012</td>
<td></td>
</tr>
</tbody>
</table>
# 2011-2012 MBO's - Membership Promotion Committee

<table>
<thead>
<tr>
<th>Description</th>
<th>Who</th>
<th>Due</th>
<th>Status</th>
<th>ASHRAE Strategic Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achieve membership net growth beyond 55,000 members by 2015</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Focus on new areas of growth</td>
<td>MP</td>
<td>2012</td>
<td>Brainstorming Complete</td>
<td>D3, S3 &amp; S4</td>
</tr>
<tr>
<td>Fundamentally re-assess current membership model and needs for change/expansion</td>
<td>MP, MC, ExCom</td>
<td>2012</td>
<td>Review Required</td>
<td>same</td>
</tr>
<tr>
<td>Focus on retention of transitioning student and YEA members</td>
<td>MP, SA, YEA</td>
<td>2013</td>
<td>Review Required</td>
<td>same</td>
</tr>
<tr>
<td>Focus on improving annual retention rates</td>
<td>MP</td>
<td>2015</td>
<td>Challenge with to RVCs</td>
<td>same</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Aggressively address delinquencies to prevent cancellations and support greater net growth.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Implement retention program with focus on calling and following-up with cancelled members</td>
</tr>
<tr>
<td>MP, Staff</td>
</tr>
</tbody>
</table>

| Focus on Re-invigorating North American Membership                              |                |      |                             |                           |
| Identify problem areas in North American membership and develop programs to counteract | MP, Staff      | 2012 | Review Required             | D3, S3 & S4               |
| Re-focus on chapter programs as a means of increasing chapter attendance        | MP, CTTC, YEA | 2012 | PAOE in Place               | same                      |
| Focus on companies and principals to maximize industry company participation in ASHRAE | MP, Staff      | 2014 | Review Required             | same                      |