

## GUIDELINES FOR CONDUCTING CHAPTERS REGIONAL CONFERENCES

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### CRC BEST PRACTICES RECOMMENDATIONS

Revised 6/22/2021

#### Award Lunch

- Laminated Cards as centerpieces summarizing RP awards.
- Printed programs at the awards dinner/luncheon to help keep people involved and the awards program moving efficiently
- Ensure that handing out the awards and photo taking is done in an efficient manner
- Consider whoever is next in line (RMCR/ARC) to host the awards luncheon, which gave him/her exposure to speaking in front of a large group

#### Business Meetings

- Provide material to attendees via commemorative memory sticks
- Use a dedicated person just to run the computer during the business session
- Formally install regional officers at the business session
- Common template for the chapter reports to help expedite the reports and help with discussion among the chapters
- Common cloud based storage location (e.g. Basecamp) to share required information for the business meetings
- Provide Questionnaires for delegates to evaluate the CRC
- Slides: use large font sizes and minimize the amount of information on single slides
- Provide large enough screen – screen size should fit proportionally to the size of the room
- Invest in regional audio sound system, so you are not relying on hotels renting the equipment
- DRC to give guidance on creating good slides-use previous outstanding presentations by chapters as guide
- Offer a prize for most informative presentation given by a chapter and/or, most creative
- Distribute information about number of members, finances, etc. prior of one week in advance to the CRC (in a spreadsheet format or some other way to show this reporting information for all chapters) then use the time during the business meeting to present the greatest challenges faced and successes achieved
- Use Basecamp and ask presenters, regional officers and chapter delegates to upload their content to the site early, before the meeting to organize to help the meeting run smoothly

#### CRC Finances

- Strong recognition of sponsors, maximize the presence of signs
- Start soliciting sponsors in early February (1 ½ years early) by making personal visits to each sponsors place of business and discussing the sponsorship levels and benefits of sponsorship with potential donors. This hard work will definitely pay off.
- Holding the CRC at local university, with hotel, catering and meeting spaces make things simple for attendees and offer facilities at reasonable cost
- Region to send seed money early to the host chapter to avoid financial stress

#### General Conduct

- Common golf shirts worn by CRC host committee

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- Host committee volunteers everywhere. Keep the registration desk full of 2 to 3 volunteers at all times. Host committee volunteers available in the hallways and meeting spaces wearing conspicuous golf style shirts in vibrant stand out colors.
- Pocket size schedules or larger name badges with the schedule on the back – excellent for navigation and planning
- Printed CRC Program to let attendees know where to go, when to be there, who to talk to, what to wear and who made it happen
- Have some office supplies at the registration desk to “fix” stuff on site
- A welcome packet can be emailed to the visiting officers prior to the start of the CRC
- Adding a checklist for a Regional Officer visit
- The visiting officers and staff can be sent a small gift to their offices prior to the CRC (Important to communicate to Region members that a gift was provided)
- Coordinate airport pickups well in advance. Share cell phone numbers with special guests.

### **History**

- Install historical displays in a dedicated room or area of dedicated travel for all to see

### **Motions during business meeting**

- Start motion planning at CRC/President Elect training Month's before the actual CRC
- Have chapter sent out prior to the CRC motions they have prepared to allow review and modification if needed to make the review more efficient
- CRC chair to reach out to RMCR to ensure the motions part of the business meeting runs efficiently and enough time is allowed to review and vote on all motions
- Take a few minutes to explain the rules of motions conducting
- State "I speak in Favor" or "I speak Against" the motion to reduce arguments and questioning of the delegates position on the motion
- Begin holding motion writing workshops in between the first Regional business sessions. Once the motions have been read in the first business session, but not seconded, this workshop allows the delegates and alternates along with members of the region, and anyone else to attend the open workshop, discuss the wording and clarify the intent of the motions.

### **Workshops**

- If a chapter chair needs assistance, they should reach out to the RVC
- Many chapter chairs struggle and should reach out to their RVC for assistance
- Use workshops as a time for brainstorming and to **share** ideas (how to make existing events better)- do "training" by phone or use a web meeting

### **Technical Sessions**

- Use of speaker rating forms

### **Other**

- The host committee chairs could have a dinner on the evening before the start of the CRC in which the visiting officers are invited. This was a great dinner that allowed the officers to get to know the folks responsible for organizing the CRC
- Local venue should be reserved early to provide enough time to organize, plan and recruit members to help

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- Locations for the social events should be reserved and advertised early enough to ensure proper attendance.
- Good social events will increase attendance.
- CRC Chair should have a co-chair(s) to help in sharing the responsibilities
- Look at venues that entice members to attend, add programs for significant others, provide babysitting, add a family touch, add YEA events, add Student related events
- Provide a family oriented Welcome Party. (highlight of the meeting and at the top of everyone's list as the most noteworthy activity during the meeting)

### **Virtual (Temporary for Extraordinary Circumstances**

- Utilize Virtual or Hybrid meetings to encourage people to participate that can't otherwise attend due to cost, health, or time constraints
- Familiarize yourself with the chosen online participation platform (Go-To-Meeting, Zoom, etc.). ASHRAE Staff can help if assistance is needed. Practice ahead of time if needed.
- Keep online portions of CRC meetings brief and focused. There is a great potential for distractions because people are not physically in the same room, away from their work and they can do other things unnoticed with their cameras off.

### **Delegate / Alternate Training**

Schedule a training session for the delegate and alternate prior to the meeting that covers duties, (caucus names, time required, motions)

### **Best Practices and Recommendations that regions can use as guidance when planning and conducting their CRCs from MBO 2018**

1. To address the Money challenge
  - a. Understanding that CRC could be a financial burden for a chapter but chapters should be investing into chapter future by sending and training more members. There is a good ROI to send attendees at CRC
  - b. Chapter to budget early in the year to be able to send a good amount of attendees
  - c. Implemented seed money to help the host chapter with the down-payment.
  - d. Creation of regional funds to pay expenses for volunteers as needed
  - e. Limit to 2 nights maximum for partial registration and 3 nights for full registration
2. To address the Time challenge
  - a. If the content of the CRC is well balanced and relevant, people should feel it is a better use of their time
  - b. Consider dropping time demanding activities such as golf
  - c. Prepare nomination ahead of CRC to reduce the need of too many caucus meetings
3. To address the Low Attendance challenge
  - a. Add technical training content to help convince the employers to support sending their employees
  - b. Local chapters to present the CRC as a great opportunity of development and a well investment of personal time

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- c. Encourage families to participate
  - d. Chapters should be investing into chapter future by sending and training more members.
4. To address the Lack of Training challenge
- a. Increase the time for workshops and commit to that time. It needs to become a must not just nice to have
  - b. Make the workshop also a place of exchange and discussions
  - c. Have the chairs work on their planning of the year during the workshop
  - d. Ensure the trainings by RVCs are informative and valuable
5. To address the Business meeting too long challenge
- a. Only keep the essential reporting
  - b. Before putting a topic on the agenda, ask the questions: it this topic relevant to the objective we want to achieve?
  - c. Chapter Reports: Keep the reporting to essential elements such as: chapter highlights, challenges to keep them interesting and relevant.
  - d. RVC Reports: Keep the reporting to essential elements such as: chapter highlights, challenges
  - e. Allow more time for discussion versus just reporting
6. To address the Lack of Technical content challenge
- a. Add a technical training portion to the CRC
  - b. Technical speaker
  - c. Leadership training