



GOVERNMENT AFFAIRS COMMITTEE (GAC)

RESOURCE MANUAL

Approved by Government Affairs Committee: 06-26-2026

GOVERNMENT AFFAIRS COMMITTEE RESOURCE MANUAL

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PURPOSE

The Government Affairs Committee Resource Manual is a reference containing guidelines, forms, procedures, sample documents and other tools that the Committee uses in its day-to-day operations. It ensures consistency in the operation of the Committee and serves as an educational tool for new members. The Government Affairs Committee Resource Manual is an internal document of the Committee and requires the approval of the Committee only.

A: COMMITTEE OBJECTIVES (MBOs)

Prior to the Society annual meeting, the incoming committee chair will prepare objectives for the committee for the next year and present these objectives to the committee for review during the Society annual meeting. The objectives will be included in the committee's report to Members Council at the annual meeting as an information item, and a copy of the objectives will be sent to ASHRAE headquarters staff, Assistant to the BOD.

- A. The rules regarding ASHRAE MBOs can be found in the Rules of the Board. The current Rules of the Board can be found on the ASHRAE website, here: <https://www.ashrae.org/about/governance>

B: HELPFUL HINTS FOR GAC REGIONAL VICE CHAIR ANNUAL SCHEDULE

JULY

1. Obtain a list of current year's Government Affairs (GA) Chairs by running a Chapter CIQ report (see attachment A, CIQ Instructions). If any Chapters are without a GA Chair, follow up with the Chapter President.
2. Send introductory letter to all GA Chairs.
3. Develop a communication that summarizes events at past ASHRAE Annual Meeting.
4. Begin preparation for fall CRC workshop (if appropriate). Contact those who may be of assistance at regional or Society level.
5. Confirm PAOE year-to-date totals for GA with headquarters, with a copy to the Regional Chair, no later than 30th of the month.
6. Prepare Regional Government Affairs MBOs for use at the region's planning session and the Society GA Committee (Please use format in Section B, above).
7. Begin planning and scheduling Government Outreach Events (GOEs)
8. Coordinate the meeting with GAC Mentor/Mentee as needed.
9. Encourage Chapter GAC Chair to attend Chapter planning meeting.
10. Look at "themes" on Chapter website and request a GAC theme for one of the upcoming Chapter meetings.
11. Create a monthly journal with to-do items.

AUGUST

1. In preparation for fall CRCs, make sure there are sufficient chapter chair certificates and other materials for distribution.
2. Prepare a regional "GA Annual Report" for presentation at the first business session at the fall CRC. See Standardized RVC Reporting Format in Section E below for sample report.
3. When arriving at the fall CRC, check the location of the room for the GA Workshop and notify the CRC General Chair immediately, if not satisfactory.
4. Monitor GA Chair PAOE points submitted in accordance with the current PAOE guidelines. Input any PAOE points required by the RVC.
5. Encourage Chapter Chairs to work with CTTC Chairs to determine whether Distinguished Lecturers are available for government outreach.
6. Conduct planning sessions with chapter GAC Chairs to identify issues chapter is targeting, set goals, and award PAOE points after meeting is conducted.
7. Coordinate meeting with GAC mentor/mentee as needed.

SEPTEMBER

1. Send a communication reminding all GA Chairs of their responsibilities.
2. Ask GA Chairs for 12-month planning schedule.
3. Monitor GA Chair PAOE points submitted in accordance with the current PAOE guidelines. Input any PAOE points required by the RVC.

4. Submit GAC award nominations to Government Affairs staff.
5. Conduct planning sessions with chapter GAC chairs to identify issues chapter is targeting, set goals, and award PAOE points after meeting is conducted.
6. Coordinate meeting(s) with GAC mentor/mentee as needed.
7. For each RVC with chapters outside the U.S., if funding is made available to reimburse transportation expenses for Government Outreach Events, a plan for this funding must be submitted to that RVC's DRC no later than September 30 of each Society Year (SY).
8. Attend the fall GOE training session provided by Government Affairs Staff if held in September.

OCTOBER

1. On approximately October 15, notify Chapter President and GGA Chairs of submission dates for PAOE points.
2. Monitor GA Chair PAOE points submitted in accordance with the current PAOE guidelines. Input any PAOE points required by the RVC for the Presidential initiatives.
3. Work on Subcommittee assignments as assigned and by due dates set by the GAC.
4. Conduct planning sessions with chapter GAC chairs to identify issues chapter is targeting, set goals, and award PAOE points after the meeting is conducted.
5. Coordinate meeting with GAC mentor/mentee as needed.
6. Attend the fall GOE training session provided by Government Affairs Staff if held in October.

NOVEMBER

1. Work on subcommittee assignments as assigned and by due dates set by GAC.
2. Monitor GA Chair PAOE points submitted in accordance with the current PAOE guidelines. Input PAOE points required by the RVC for the Presidential guidelines.
3. Coordinate meeting(s) with GAC mentor/mentee as needed.

DECEMBER

1. Prepare and distribute second or third regional communication to GAC Chapter Chairs reminding them of their responsibilities and updating them on regional progress to date (e.g., that U.S. states may begin their legislative sessions in January, and that Chairs should be actively planning GOEs).
2. Follow up with chapters on "Chapter Program Evaluation Summary" Forms for Best Chapter Program Competition, as applicable.
3. Continue efforts on subcommittee assignments as applicable.
4. Approximately December 15, remind Chapter Presidents and GA Chairs of due date for PAOE point submissions.
5. Monitor GA Chair PAOE points submitted in accordance with the current Presidential PAOE guidelines. Input any PAOE points required by the RVC for the Presidential initiatives.

6. Prepare Regional RVC report, liaison overview, and updated MBO for Society meeting. Submit documentation to GAC per the criteria established by the committee (due dates and paper/electronic format).
7. Coordinate meeting with GAC mentor/mentee as needed.
8. Attend winter GOE training session provided by Government Affairs Staff if held in December

JANUARY

1. Interface with subcommittee members and GA Chairs as they prepare progress reports.
2. Attend subcommittee meetings prior to GA Committee meeting at ASHRAE Winter Conference.
3. Attend GA Committee and assigned subcommittee meetings at ASHRAE Winter Conference.
4. Attend other required committee/council meetings at ASHRAE Winter Conference.
5. Monitor GA Chair PAOE points submitted in accordance with the current PAOE guidelines. Input any PAOE points required by the RVC.
6. Coordinate meeting with GAC mentor/mentee at Winter meeting to review year-to-date progress.
7. Attend the winter GOE training session provided by Government Affairs Staff if held in January.

FEBRUARY

1. Begin preparations for spring CRC Workshop (if appropriate). Contact those who may be of assistance at regional or Society level.
2. Prepare and distribute a letter/email to GAC Chapter Chairs reminding them of their responsibilities and updating them on regional progress to date (e.g. that they should be finalizing and executing their GOEs, and updating them on GOE progress).
3. Approximately February 15, notify Chapter Presidents and GA Chairs of due date for PAOE point submission.
4. Monitor GA Chairmen PAOE points submitted in accordance with the current PAOE guidelines. Input any PAOE points required by the RVC.
5. Coordinate meeting with GAC mentor/mentee as needed.
6. Encourage GA Chairs to coordinate with local Student Activities chairs as well as CTT chairs to plan events in conjunction with E-Week.

MARCH

1. Continue work on subcommittee assignments as applicable.
2. Approximately March 15, notify Chapter Presidents and GGA Chairs of due date for PAOE point submission.

APRIL

1. Add any additional materials to enhance the GA workshop for spring CRC.
2. Continue efforts on subcommittee assignments.
3. Notify Chapter Presidents and GA Chairs of due dates for PAOE point submission. Closely monitor PAOE reporting and work with delinquent chapters. Monitor GA Chair PAOE points submitted in accordance with the current PAOE guidelines. Input any PAOE points required by the RVC.
4. Coordinate meeting(s) with GAC mentor/mentee as needed.

MAY

1. In preparation for spring CRC, make sure there are sufficient chapter chair certificates and materials for distribution.
2. Prepare a regional “GA Annual Report” for presentation at the Spring CRC. See the “standardized RVC reporting format” in section D below.
3. Indicate preferred subcommittee assignments to incoming GAC Committee Chair.
4. Notify Chapter Presidents and GAC Chapter Chairs of due date for PAEO point submissions. Input any PAOE points as necessary.
5. Determine due dates for GAC awards and notify chapter chairs.

JUNE

1. Follow up with chapters on “Chapter Program Evaluation Summary” forms for best chapter program competition, as applicable.
2. Prepare for ASHRAE annual conference, including a RVC progress report.
3. As necessary, assist Society level subcommittees in preparation of progress reports for conference. Attend GA committee and assigned subcommittee meetings at ASHRAE annual meeting.
4. Notify chapter presidents and chapter chairs of due dates for FINAL PAOE point submissions, monitor progress, input as necessary.
5. Plan for the next Society Year
 - a. If continuing as GAC RVC, develop a plan for the next Society Year.
 - b. If your RVC term is finished, schedule a meeting with your Region’s incoming RVC to share information and answer questions.

C: INFORMATION FOR TRAVEL EXPECTED OF RVCs

Government Affairs Committee RVCs are expected to attend their CRCs, the ASHRAE Summer conference, and the ASHRAE Winter Conference.

Reimbursement for certain travel expenses is provided. For RVC travel to the ASHRAE Summer Conference, the ASHRAE Winter Conference, and to CRCs, transportation (flight or mileage) reimbursement is provided by the Society. ASHRAE Government Affairs staff will send information about reimbursement in advance of these events.

Additionally, RVCs should be in communication and coordination with their region regarding travel to chapters and events specific to their region.

D: STANDARDIZED RVC / REPORTING FORMAT

The following information is compiled into a summary spreadsheet showing activity for each region. The spreadsheet is reviewed by GAC at each Society meeting.

ACTIVITY
CRC (Review with DRC)
Region #:
Total Number of Chapters in Region:
Total Number of US Chapters in Region:
Total Number of International Chapters in Region:
Numbers of Chapters Present at CRC Training:
Number of GA Chapter Chairs/Substitutes Present at GA Training:
Percentage of Participation:
Percentage of GA Chapter Chair Participation:
Number of Planning Sessions Held:
PAOE
Number of Chapters Reporting PAOE Points:
Number of Chapters Making Society Minimum:
Number of Chapters Making Society PAR:
Highest PAOE Points by a Chapter:
Percentage of Chapters Reporting:
Percentage of Chapters Making Society Minimum:
Percentage of Chapters Making Society PAR:
PAOE Trending by Chapter (up or down):
CHAPTER VISITS MADE BY GAC RVC
Number of Visits Made:
Number of Visits Scheduled:
Percentage of Chapters Visited:
GAC AWARDS
Number of Government Affairs Award Submissions:

GOVERNMENT OUTREACH EVENTS
Number of Local Events:
Number of State Events:
Number of Federal Events:
Number of Global Events:
Number of Chapters Participating:
Number of Government Officials Visited:
Number of ASHRAE Members Participating:
Number of Chapters Reporting:
Number of Days Duration:

E: GAC CHAPTER CHAIR CALENDAR

MAY-JULY

1. Recruit the GAC chair (if not filled yet) and additional GAC committee members as needed.
2. Set up a GAC committee meeting and assign members to manage each state and local jurisdiction within the Chapter's geographical boundaries.
3. Develop an article for chapter newsletter that highlights events and overall PAOE of last year's chapter meetings.
4. Contact your GAC Regional Vice Chair (RVC). Prepare and attend Fall CRC workshop (if appropriate).
5. Attend GAC Chapter Training Workshop at the Fall CRC (if appropriate).
6. Begin planning and scheduling Government Outreach Events.
7. Attend the Chapter planning meeting, if possible.
8. Look at "themes on Chapter website and request a GAC theme for one of the upcoming meetings.
9. Start a journal with monthly to do items.

AUGUST

1. Review the current year's society PAOE GAC sheets with committee and BOG members, develop tentative goals and deadlines. Encourage joint activities with local government organizations.
2. Deliver MBO to the chapter president.
3. Coordinate with RVCs regarding Government Affairs award nominations.

SEPTEMBER

1. Announce chapter-level Government Activities deadlines, requirements for competitions at chapter, regional and society levels and actively encourage and assist submissions.
2. Schedule a planning session with RVC which is due by October 30.
3. Report on GAC activities that have occurred since the last meeting.
4. Attend the fall GOE training session provided by Government Affairs Staff if held in September.

OCTOBER

1. Report on GAC activities that have occurred since the last meeting.
2. Schedule a planning session, if not already completed, with RVC which is due by October 30.
3. Attend the fall GOE training session provided by Government Affairs Staff if held in October.

NOVEMBER

1. Report on GAC activities that have occurred since the last meeting.
2. Provide or contribute a GAC article for the next issue of chapter newsletter.

DECEMBER

1. Report on GAC activities that have occurred since the last meeting.
2. Provide or contribute an article and photos for the next issue of chapter newsletter.
3. Remind BOG members, committee chairs and membership to report qualified, GAC PAOE activities, and enter these PAOE points before the end of year.
4. Attend winter GOE training session provided by Government Affairs Staff if held in December.

JANUARY

1. Report on GAC activities that have occurred since the last meeting.
2. Provide or contribute an article and photos for the next issue of chapter newsletter.
3. Coordinate with Student Activities Chair and CTT chair on upcoming E-Week events the chapter will be involved in.
4. Attend the winter GOE training session provided by Government Affairs Staff if held in January.

FEBRUARY

1. Contact your GAC Regional Vice Chair (RVC). Prepare and attend Spring CRC workshop (if appropriate).

2. Attend GAC Chapter Training Workshop at the Spring CRC (if appropriate).
3. Report on GAC activities that have occurred since the last meeting.
4. Provide or contribute an article and photos for the next issue of chapter newsletter.
5. GAC Chapter Chairs may, at their discretion, attend the GAC meeting at the ASRHAE Winter Conference.
6. New RVCs will be notified of their appointment.

MARCH

1. Contact your GAC Regional Vice Chair (RVC). Prepare and attend Spring CRC workshop (if appropriate).
2. Attend GAC Chapter Training Workshop at the Spring CRC (if appropriate).
3. Report on GAC activities that have occurred since the last meeting.
4. Provide or contribute an article and photos for the next issue of chapter newsletter.
5. Assemble judges, judge chapter's Government Activities Award entries, and notify chapter winners. Forward first-place winner/entry in each category to RVC for regional competition.
6. Announce the date/time and topic of society web seminar to membership.

APRIL

1. Report on GAC activities that have occurred since the last meeting.
2. Provide or contribute articles and photos for the next issue of chapter newsletter.

MAY

1. Report on GAC activities that have occurred since the last meeting.
2. Provide or contribute an article and photos for the next issue of chapter newsletter.
3. Help chapter's Government Award first-place winners to refine entries in preparation for regional submittal.

4. Remind chapter members in the newsletter for the upcoming society annual meeting.

JUNE

1. Report on GAC activities that have occurred since the last meeting.
2. Remind BOG members, committee chairs and membership to report qualified, GAC PAOE activities, and enter these PAOE points before July 15.
3. Help chapter's regional Government Activities Award first-place winners to refine entries in preparation for society submittal, ensure the submissions will be received by society by September 30.
4. GAC Chapter Chairs may, at their discretion, attend the GAC meeting at the ASHRAE Summer Conference.

F: GAC STANDING RULES

1. Every GAC and Subcommittee meeting invitation or communication about scheduling must contain the time zone of the meeting.
2. The Government Affairs Committee will hold two annual training sessions. The first session is intended primarily for incoming GAC members and will take place shortly before the start of the new Society Year; this first session will broadly cover the mission, functions, procedures, logistics, and resources of the Committee. The second session will focus on Government Outreach Events and will take place in two parts, with the first part scheduled for September/October and the second part scheduled for December/January.
3. All GAC meetings, including subcommittee meetings, at the Annual and Winter Conferences will be made available for remote attendance by the provision of a virtual option.
4. The rules regarding ASHRAE Council and Committee meetings can be found in the Rules of the Board. The current Rules of the Board can be found on the ASHRAE website, here: <https://www.ashrae.org/about/governance>.
5. Schedule for review and approval of existing Public Policy Issue Briefs (PPIBs):

The Policy and Programs Subcommittee is responsible for reviewing existing PPIBs annually and making recommendations to the Executive Subcommittee to reaffirm, revise or retire or update these PPIBs, with GAC subsequently taking actions on these recommendations. A schedule for the review and approval of existing PPIBs is presented below. This schedule is based on existing PPIBs being approved by the end of the Society Year. For PPIBs that have an expiration date other than June, the schedule can be shifted or condensed to complete the required steps by the expiration date. The schedule can be modified as circumstances dictate but it is important to avoid pushing all of the actions and approvals to the end of the Society Year.

Assign PPSC members to review existing PPIBs after 1st PPSC meeting of SY (presumably by early fall). In coordination with GAC staff, share PPIBs with relevant technical committees (e.g. EHC, CE-IEQ, Position Document Committees) to ask for input on updates and revisions.

November 1: Assigned reviewers consolidate comments to create proposed revision to each existing PPIB. Alternatively, a recommendation to simply reaffirm or withdraw each PPIB is made.

December 1: PPSC chair distributes proposed revisions or recommendations to reaffirm or withdraw to PPSC for review by mid-December.

January 1: Drafts are revised by PPSC chair and assigned reviewers in preparation for PPSC vote at winter meeting.

Winter meeting timeframe: Proposed revisions or recommendations to reaffirm or withdraw are approved by Executive Subcommittee.

Winter meeting timeframe: Proposed revisions or recommendations to reaffirm or withdraw are approved by GAC.

Early February: Approved draft revisions sent to Tech Council or its designee for review and comment by end of February.

March 1: Tech Council comments reviewed by PPSC chair and assigned reviewer, and PPIBs are further revised as needed. Responses to Tech Council comments are prepared.

April 1: If there are no substantive changes, the revised documents are distributed to GAC as an information item and considered ready for posting and distribution.

April 1 through June 1: If substantive changes are made to any PPIBs, the revised documents are voted on by PPSC, then Exec, then GAC.

End of Society Year: Revised PPIBs are posted and distributed.

G: GOVERNMENT AFFAIRS AWARD

The Government Affairs Award recognizes an ASHRAE member who demonstrates outstanding efforts in the national, state, provincial and/or local government on technical issues important to ASHRAE.

Purpose

The purpose of the award is to stimulate effective participation by ASHRAE members in national, state, provincial, and/or local government activities in connection with technical issues related to the purpose of the Society.

Guidelines for the Government Affairs Award Presentation

Each year the Society recognizes exceptional performance by a member in the area of government activities. During the Society fiscal year, Chapters assemble support materials describing the members' activities in interacting with national, state, provincial and/or local governments.

A typical award application includes a standard cover page (see below), a narrative section, the Chapter's government advocacy plan, the member's government advocacy with relevant documentation, publicity, etc.

Eligibility Requirements

An ASHRAE member interacting with national, state, provincial and/or local governments is eligible for nomination for this award. Applications may be submitted by a Chapter or by any ASHRAE member in good standing. The winner is selected from these entries. The Chair of the GAC Member Mobilization Subcommittee is responsible for organizing the Government Affairs Awards program, establishing submission deadlines and selecting the entry to Society programs.

Judging: A minimum of three judges will be selected by the GAC. At least one judge should have experience as a Chapter officer - preferably with involvement in a Chapter government activity. Judging guidelines for the Society award are provided in the GAC's MOP. The judging occurs in the fall immediately following the last Chapters Regional Conference.

Selection Schedule

1. Regional Vice Chair (RVC) may select an entry for the CRC (optional):
 - a. At a date determined by the RVC, submittals are due to RVC for the Regional competition.
 - b. At a date determined by the RVC, judging is completed for Regional Submittals.
 - c. Notification to Regional Winner is given at the CRC.
2. Nominations for this award are submitted to the Regional Vice Chair, who submits all entries for the Society competition no later than October 31. All submissions must include:
 - a. Standard Cover Page, Narrative Section, the Chapter's or Chapters' Government Affairs Plan, Relevant Documentation, Publicity, etc.
 - i. Submit one copy electronically in pdf format to GovAffairs@ashrae.org.
3. Staff sends regional submittals to GAC Judging Panel by November 15.
4. Judges deliberate and make their decision by the Winter Meeting.
 - a. GAC recommends final candidate to Honors and Awards Committee for approval by Members Council at Winter Meeting.
 - b. Staff notifies the first place winner.
 - c. Judging Panel submits article on winner to be published in the Government Affairs Update (GAU).
 - d. The RVC notifies individuals who were not selected and lets them know that they will receive a highlight in an upcoming GAU.

Presentation

The Government Affairs Award is presented at the Society's Annual Meeting. The first place winner is recognized during the Honors and Awards portion of the Plenary Session.

GAC Submittal Format for the Government Affairs Award

1. Cover Page:

GOVERNMENT AFFAIRS AWARD APPLICATION

Society Year: 20_ - 20_

Contact information for Nominee:

Name of Nominee	ASHRAE Region	Chapter	Positions in Chapter	Full Mailing Address	Email	Chapter President Name, Signature and Date

Contact information for Nominator(s)

Name(s) of persons making Nomination	ASHRAE Region	Chapter	Positions in Chapter	Full Mailing Address	Email

Signature and Date:

2. Government Affairs Plan

- Presentations to Government Groups:
- Methods to Encourage ASHRAE Chapter Member Activity with Government Entities:
- Non-ASHRAE Member interactions with Government Entities:

- Description of Activities:
- Plan and Associated Accomplishments:
- Formation and coordination of efforts with other Chapters (if applicable):

3. Discussion of how Government Affairs efforts were implemented, highlighting successes and failures by this nominee or team of nominees. If applicable, please note how multi-Chapter teams' activities enhanced the success of this effort.

- Discussion of future focus and activities:
- Optional Appendices:
 - Discussion of Future Focus and Activities Appendices – Optional
 - Government Entity Identification Forms
 - Liaison Interest Forms
 - Chapter Involvement Survey Forms
 - Correspondence
 - Publicity

Submit nomination to the Government Activities Committee's Member Mobilization Subcommittee Chair by sending to GovAffairs@ashrae.org

Scoring Criteria for ASHRAE Government Affairs Award Nominations The strength of each candidate will be assessed on the following basis:

- **Outstanding Effort** demonstrated by the candidate;
- **Achievements** resulting from their government outreach activities;
- Connecting government officials with **Technical Issues** related to ASHRAE; and
- Ability to **stimulate effective participation by ASHRAE members.**

For each of the four criteria identified above, each application will be evaluated using a numeric score of 1 to 5 as follows:

- 1 – none or minimal
- 2 – modest performance
- 3 – solid performance
- 4 – excellent performance

5 – exceptional performance

To guide reviewers of the applications, each of the criteria will be assessed based on the considerations outlined below:

Outstanding Effort

- Number and extensiveness of meetings organized and led
- Number of government officials involved
- Level of seniority of the government officials involved

Achievements

As a result of the government outreach led by the candidate, the government entity is now:

- Considering use of ASHRAE standards, guidelines or other resources;
- Considering use of ASHRAE training courses;
- Referencing ASHRAE standards or other resources in policies or other materials; and/or
- Formally adopted or announced intent to adopt ASHRAE standards

Technical Issues Addressed

- Nominee used an ASHRAE Subject Matter Expert (SME) in a government outreach event
- Nominee led a GOE at which an ASHRAE member provided a useful presentation or briefing on a technical issue(s)
- Nominee helped government officials work through technical issues or answered their technical question(s)

Stimulating Effective Participation by ASHRAE Members

- Number of ASHRAE members involved in government outreach efforts led by applicant
- Number of new ASHRAE members getting involved in government outreach as a result of the applicant's efforts

Evaluation Process

For each application, the Award Judging Panel will total the points across the 4 categories, with **20** being the maximum number of potential points awarded. The applicants will then be ranked by scores, and the applicant with the highest score will be recommended for the award to the GAC, unless an exceptional circumstance arises that would cause the Judging Panel to recommend an applicant with a lower total score. In some cases, the Judging Panel may want to weight the criteria above differently, so a weighted average could alternatively be used for evaluation.

H: DAVE PALTY OUTSTANDING GAC SERVICE AWARD

The Dave Palty Outstanding GAC Service Award is an informal committee award given each year to recognize outstanding overall effort on the GAC committee. In addition to service, the awardee should exemplify Dave's willing spirit to welcome, encourage, include, uplift, and inspire others.

The subject award will be judged by a 3-person committee made up of the current year's Chair, Vice-Chair, and GAC staff director.

The individual will be recognized at the GAC committee meeting at the ASHRAE annual meeting and will receive a plaque recognizing their outstanding efforts over the course of the year to promote and advocate on behalf of ASHRAE.

I: MOTIONS

Content

When a motion is made recommending that a higher body approve it, the following shall be included:

- Motion (request action)
- Background (reason for action)
- Fiscal impact (estimated cost of action)
- Staff impact (estimated staff time required)

Motion writing information is available at:

<https://www.ashrae.org/file%20library/communities/chapters/ashrae%20chapters/motions-workshop--2-.pptx>

J: Mentoring Program

Background

The Rules of the Board Section 2.105.002.4 describe the requirements for mentoring programs. A link to the Rules of the Board can be found on ASHRAE's website, here: <https://www.ashrae.org/about/governance>.

The Government Affairs Mentoring Program is a unique opportunity to create positive mentor/mentee relationships within the Government Affairs Committee. Members can build relationships that last well beyond their term on the GAC; learn best practices and insights from peers to be more effective in GAC roles; share their experiences; and develop ideas for increasing overall GAC impact.

- The GAC Chair will match Mentors and Mentees prior to the beginning of the next Society Year.
- Typically, the pairs will have similar GAC roles (RVCs matched with RVCs, Members-at-large matched with Members-at-large).
- Program will run for the entire Society Year (July-June).
- Mentors/Mentees should meet for at least one hour per month.

Mentor Roles and Responsibilities

- Support the mentee's potential by assisting and advising to support the mentee's ability to thrive in GAC roles.
- Establish and maintain trust with mentees.
- Listen and assist in understanding their needs.
- Ensure that both have enough time to foster this relationship.
- Create a personal approach based on mentee's needs.

Mentee Roles and Responsibilities

- Maintain the relationship by managing logistics, setting up meetings, and following through with agreed upon next steps.
- Come prepared for each session with a general agenda/discussion topics.
- Identify needs and goals, carefully consider mentor's feedback taking appropriate action.
- Be coachable and ask for clarification when needed.

K: TIPS FOR GAC MEMBERS MAKING A CHAPTER VISIT

Before You Go

- Notify the Chapter President and Government Affairs Committee Chair (if you're an RVC) that you are planning a trip to visit their Chapter.
- If you're an RVC, make sure the Chapter Committee Chairs and their Committee members will be at the meeting.
- Arrange with the Chapter President and Committee Chair for time to speak during the Chapter meeting.
- Arrange to attend BOG meeting – find out date/time – ask them for a “special” meeting if they don't typically meet the same day as the Chapter meeting.
- Ask to make other local visits – school, employer, etc. or offer to conduct a workshop
- Confirm date, get there early, confirm hotel transportation, and provide them with a summary of what you want to see/do and any audio-visual needs. Give them information on your presentation (if speaker). Send bio for their newsletter.
- Ask where they need help.
- Prepare some information regarding ASHRAE Society news to share.
- Review their Newsletter/website, prior to your visit.

During Your Visit

- Attend BOG meeting – actively participate, rather than observe. Some people even run the meeting or send questions before their visit and request responses prior to the meeting.
 - Remind them to update their ASHRAE bios.
 - Say something different from main meeting talk, but it's ok to reinforce some issues.
 - Focus more on how to help them keep their Chapter viable.
- Meet with your Government Affairs Committee and its Chair, separately.
 - Catch up on training.
 - Refresh
 - Help with questions.
 - Training their replacement – help ID or meet them.
 - Review plan/MBOs.

- Make local visits – school, employer, facilities, govt. office, media, church, etc.
- Check their ASHRAE literature stash and advise on sources for updating brochures.
- Speak for at least 10 minutes. You are giving up valuable personal time, ASHRAE paid for you to travel all that way, and the Chapter is paying for your hotel. Give them at least ten good minutes of presentation with a high level of value. Prepare, practice, and deliver a high-quality talk.
- Perform your “function” at their Chapter meeting (raise \$ for RP if you’re the RP RVC, sign up a member if you’re MP RVC, etc.)
- Give a training seminar or workshop if you have a skill area to share.
- Invite guests to join ASHRAE.
- Invite people to make an ASHRAE Research donation.
- Meet lots of people. Model to the Chapter members how to work a room, introducing people to each other, making everyone feel welcome and engaged.
 - Invite people to attend the CRC (do this at the BOG and at the Main Meeting)
 - Ask who is going.
 - Explain why you should go.
 - Explain what it is, if needed.
- Try to help them understand what the Region is, how its glue between Society and Chapter.

After You Return

- Follow up on your promises to them/to do list within two weeks.
- Send a follow-up report to DRC within 2 weeks, who will share with the rest of the regional executive group. Include the following in your report:
 - Any logistical warnings.
 - Upcoming issues/events to be aware of.
 - What you did/saw.
 - Your perception of the condition of the Chapter.
 - An update of the Star search list.
 - A list who you were told is going to CRC.
 - Any special successes/challenges.
- Send a thank-you for hosting to Chapter President and Government Affairs Committee Chair.

- Recognize any special assistance provided to you (airport pick-up, taken fishing, etc.)
 - Should be a US Postal note, not just an e-mail or phone call.
 - Send within two weeks!

L: CHANGES TO THE RULES OF THE BOARD OR MOP

Proposed changes to the Rules of the Board, or to any Society-wide policy or procedure, must follow the process outlined in the Rules of the Board Section 10.3.3. A link to the Rules of the Board can be found on ASHRAE's website, here: <https://www.ashrae.org/about/governance>.

Proposed changes, including additions and deletions to MOPs, should follow the same procedure as that for ROB's (see above), except that changes to a committee's MOP must be approved by the committee and by the body to which the committee reports (e.g., a council). No further approvals are required.

M: CHAPTERS REGIONAL CONFERENCE (CRC)

Background

The term "Chapters Regional Conference" (CRC) defines a meeting of all the chapters in the region. The Chapters Regional Conference Committee conducts the orientation session, caucus, executive session, and business meetings. The conference may also include workshops, technical sessions, technical tours, and addresses by Society officers, regional award presentations and offers opportunities for regional fellowship. A Chapters Regional Conference (CRC) will extend for the amount of time, determined necessary by the Director and Regional Chair (DRC) to conduct the business of the region.

Scope and Purpose

The CRC is to provide a forum for the dissemination of information pertaining to chapter and regional activities, and provide a medium for:

- Chapters to report on their activities for the previous year and establish goals for the coming year.
- Regional officers to report on their activities and plans.
- Society officers to inform the region of Society plans, review chapter activities within the region and participate in workshops.
- Chapter delegates to submit motions for consideration by the region for proper review and action as it relates to Regional and Society activities.
- Chapter delegates to present nominees for Society and regional offices and candidates for honors and awards.
- Conducting chapter workshops that will educate and prepare officers and committee members to fulfill their responsibilities.
- Conducting technical sessions on subjects that will educate as well as increase attendance.
- Organizing social activities that will increase attendance and promote comradeship.
- Recognizing and presenting awards to chapter and regional members.

Attendance at meetings of the Chapters Regional Conference (CRC) is expected of all chapter delegates, alternates, regional vice chairs, regional historian and chapter committee chairs for Membership Promotion, Student Activities, Research Promotion, Government Affairs and Historical Committees and regional member

and alternate to the Nominating Committee. In addition, any Society member residing in the region is encouraged to attend these meetings. The attendance of chapter officers and committee chairs, although not mandatory, is strongly encouraged.

N: STYLE AND FORMAT FOR OFFICIAL ASHRAE LETTERS AND EMAILS

When sending emails and letters on behalf of the Society, RVCs should be sure that their signature line clearly communicates that they are representing the Society in their capacity as an RVC. Per ASHRAE's standard operating procedure of being agnostic to non-ASHRAE business outcomes, care should be taken to exclude corporate promotion from signature lines. Such promotion is often included in 'automatic signatures' (e.g., upcoming corporate events and conferences).

For examples of official ASHRAE letters to government officials that show the style and format that is desired, please review past examples which can be found here: <https://www.ashrae.org/about/government-affairs/policy-positions-and-issues#letters>.

All letters written on behalf of the Society should be written in coordination and approved by Government Affairs staff.

O: GOVERNMENT OUTREACH EVENT (GOE) REPORTING FORM

A Government Outreach Reporting Form should be submitted for every event or meeting ASHRAE members hold with government officials.

Contact your RVC or Government Affairs staff for questions or assistance with the form.

The Reporting Form is in the Advocacy Toolkit on the ASHRAE website; a member login will be needed for access.

A link to the Reporting Form can be found here, as well as a document defining which specific events qualify as Government Outreach Events:

<https://www.ashrae.org/about/government-affairs/grassroots-advocacy/accomplishments#plan>.

P: TECHNICAL ASSISTANCE FOR INTERNATIONAL OUTREACH EVENTS

Background

Presently, funding is available to each Region with chapters outside the U.S. for reimbursing eligible transportation expenses for members of their region participating in Government Outreach Event activities. If ASHRAE Society includes this funding in the Society Budget, the following procedure should be used by RVCs in order to access these funds.

Procedure

1. A budget and timeline shall be developed by the RVC detailing the use and purpose of expenditures (see Attachment C for an example budget).
2. Eligible expenditures shall only include transportation (flight or mileage) expenses.
3. The RVC's budget must be approved in writing by that RVC's Director and Regional Chair (DRC), and approved budgets shall be submitted to the GAC and GASC Staff Liaisons.
4. It is recommended that the DRC-approved budget plans be finalized by November 30 and submitted to the GAC and GASC Staff Liaisons, along with written approval from the relevant DRC.
5. After November 30 of the Society Year, the money that is unbudgeted will be made available to Regions with chapters outside the U.S., per the process below:
 - a. The GASC Staff Liaison will inform all RVCs with chapters outside the U.S. and the GAC Chair and Vice Chair of how much unbudgeted money remains in the fund by December 10.
 - b. RVCs may apply for additional funds by developing a budget that details the use, purpose, and timeline of expenditures. Such budget must be approved by the DRC and submitted to the GAC and GASC Staff Liaisons by February 15.
 - c. If the additional funds requested are greater than the amounts available, funds for each region applying for the additional funds shall be distributed equally across the regions that have submitted DRC-approved budgets for the remaining funds up to the total amount in the budget.

Q: CONTACTING OTHER COMMITTEES OR COUNCLS FOR GUIDANCE

This section provides procedures when specific knowledge or guidance is needed from other ASHRAE Committees or Councils. The procedure should be undertaken by a member of the GAC Executive Committee as assigned by the GAC Chair.

1. Contact GAC Staff and the appropriate Council Representative (Members, Technology, Publication and Education) for input.
2. Using Council Representative input, determine if this subject should be referred to a single Committee of that Council, or the Council.
 - a. If a single Committee has the needed information, either the Council Representative or assigned person should contact the Committee Chair with the background and request.
 - b. If it is determined that multiple committees may provide answers, the Council Representative should coordinate the request with the Council.

R: RECOMMENDATION LETTERS FOR APPOINTMENTS TO GOVERNMENT BODIES OR ADVISORY BOARDS TO GOVERNMENT BODIES

ASHRAE members who wish to submit recommendation letters to support the appointment of ASHRAE members to an advisory board to a government body may request that ASHRAE Staff draft such letters. To request that a letter be drafted, please submit the following information to staff at least one week before the application period closes:

1. Written confirmation that the process for selecting the Member for recommendation conforms with Section 2.5, Subsection I of the Manual for Chapter Operations, including BOG approval.
2. Name of member to be recommended
3. Position & Body (e.g. “Board Member” and “Code Advisory Board”)
4. Information on the Process (who is appointing, describe criteria for the position, deadline)
5. Length of term of the position
6. Rationale for the recommendation

The letter may be submitted by the Chapter per the Manual for Chapter Operations. If the Chapter wants the ASHRAE President to send the letter, staff will follow the standard approval process for Society level letters, and request the signature of the Society President.

S: ATTACHMENTS

Attachment A

Instructions to Enter the Chapter Information Questionnaire (CIQ):

1. From the ASHRAE Homepage, login using your email address and password.
2. Click on the Communities blue tab.
3. Click on the Chapters link on the drop-down menu.
4. On the Chapters page, select Chapter Reports, PAOE and CIQ.
5. In the left column, click on the Regional tab; the list of all Chapters in the Region will come up.
6. Click on the link of the chapter's name.
7. The Members list will come up.
8. There will be buttons above the Members list to:

RUN CHAPTER REPORTS

ADD CHAPTER OFFICERS

PAOE

9. To run the CIQ reports, click on the Chapter Reports icon at the top of the page.
10. Click on the report you wish to run:
 - a. **Chapter Officer Roster:** this report lists the chapter positions for the current Society Year
 - b. **Chapter Information Questionnaire:** when chapter positions are entered prior to the next society year, this report will list those positions for the future Society Year.

Attachment B

MOTION GOVERNMENT AFFAIRS COMMITTEE

MOVED BY: _____

SECONDED BY: _____

MOTION: _____

BACKGROUND: _____

FISCAL IMPACT: _____

STAFF IMPACT: _____

Vote Count: For: ____ Against: ____ Abstaining: ____

Chair Voting: Yes: ____ No ____

Motion Passed: ☐

Motion Failed: ☐

Motion Referred To: _____

Attachment C

Example Form – Government Outreach Event Plan

(Note this is an example only; the form and information and reimbursement plan may vary depending on Regional Needs, and Requirements of the DRC.)



August 25, 2026

To:

ASHRAE Society Leadership
Alice Yates, Director of Government Affairs
Jacob Karson, Manager of Government Outreach and Engagement

Subject: Region XII Transportation Funding Request for Government Outreach Events

ASHRAE Society provides reimbursement of up to **\$2,000 USD** for "eligible transportation expenses for members of their region participating in Government Outreach Event (GOE) activities." Per ASHRAE's Transportation Policy, this funding exclusively covers air travel. All additional expenses, including accommodations, meals, and incidentals—will be managed by individual chapters or regional members.

Region XII respectfully requests the full \$2,000 USD to support transportation for chapter representatives and regional officers, including the Regional Vice Chair for the Government Affairs Committee (RVC GAC), to attend government outreach events across our geographically expansive and internationally diverse region.

Tentative Schedule of Government Outreach Events, Costs and Travel Details :

- **Ecuador Chapter (Quito – Salón del Frio):** September 8–10, 2026
- **Colombia Chapter (Bogota – Expo Acaire):** September 28–30, 2026
- **Brazil Chapter (Brasilia – Board of Directors):** November 10–13, 2026

GOE International Destination	Estimated Round Trip Cost (USD)	Tentative Travelers	Travelling From
Quito, Ecuador	\$400	Luis Alvarado (RVC GAC)	Lima, Peru
Bogota, Colombia	\$400	Luis Alvarado (RVC GAC) <u>OR</u> Leonardo Astorga (Region XII GTIC Representative)	Lima, Peru <u>OR</u> Santiago, Chile
Brasilia, Brazil	\$1200	GAC Chairs of ASHRAE Brazil and South Brazil chapters, <u>AND</u> Leonardo Astorga (Region XII GTIC Representative)	From two Brazilian cities <u>AND</u> Santiago, Chile
Total Transportation Cost	\$2,000 USD		

This request supports Region XII's efforts to foster impactful engagement with governmental stakeholders across Latin America and the Caribbean and to promote ASHRAE's mission throughout the region.

Thank you for your thoughtful consideration.

Sincerely,

A handwritten signature in blue ink, appearing to read 'J. Alphonso'.

Jason Alphonso
Region XII Director and Regional Chair

A handwritten signature in blue ink, appearing to read 'Luis Alvarado'. Below the signature is a black rectangular redaction box.

Luis Alvarado

Luis Alvarado
Region XII GAC Regional Vice Chair