



**Historical Committee**  
Meeting of Thursday, June 3, 2021

**Minutes**

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1. Call to Order

Mr. Borges called the meeting to order at 11:30 am EDT.

2. Code of Ethics and Values Commitment

Mr. Borges read the ASHRAE Code of Ethics and Values Commitment aloud to the committee.

In this and all other ASHRAE meetings, we will act with honesty, fairness, courtesy, competence, inclusiveness and respect for others, which exemplify our core values of excellence, commitment, integrity, collaboration, volunteerism, and diversity, and we shall avoid all real or perceived conflicts of interests.

(Code of Ethics: <https://www.ashrae.org/about/governance/code-of-ethics>)

(Core Values: <https://www.ashrae.org/about/ashrae-s-core-values>)

3. Introduction of Subcommittee Members and Visitors

Committee members and guests introduced themselves.

**Committee Members**

Dean Borges, Chair

Spencer Morasch

Atilla Biyikoglu

Nissun Feiner

absent

Bernard Nagengast

Glenn Remington

Branislav Todorovic

absent

Ahmed Alaa Eldin

Mohamed

Bill Dean

absent

**Guests**

Ahmed Waley

## Historical Committee Minutes · Jun 3, 2021 · Virtual Meeting

### 4. Review of Agenda

Mr. Borges reviewed the agenda with the committee with no new items added for discussion.

### 5. Approval of Minutes

It was moved and seconded:

#### **(1) Approve the draft minutes as distributed for the January 15, 2021 Meeting.**

**Background:** Historical Committee Meeting Minutes were distributed and posted to Basecamp.

**Fiscal Impact:** None.

#### **MOTION (1) Approved 5-0-0, CNV**

An action item was assigned to staff request approved meeting minutes be posted to the Historical Committee Historical Committee page of the ASHRAE website and post meeting minutes to the Historical Committee Basecamp site. **(ACTION ITEM 1)**

*Secretary's Note: Completed June 3, 2021. Request email (Attachment A) & posted to Basecamp.*

### 6. Historical Committee MBOs

Mr. Borges reviewed and reported on progress of the committee MBOs shown in Attachment B.

1. [Develop proposals to improve the opportunities for Regional Historians to participate in Historical Committee activities.](#)

With a limited travel budget, the committee will continue to encourage on-line participation of RVCs at committee meetings.

2. [Develop PAOE and recommended changes to 2021- 2022 PAOE.](#)

Mr. Borges reported this MBO #2 complete shown in Attachment C.

An action item was assigned to staff to send the Mr. Schwedler's draft 2021-2022 PAOE requirements. **(ACTION ITEM 2)**

*Secretary's Note: Completed June 3, 2021. Emailed HC (Attachment D) & posted to Basecamp.*

3. [History VC PAOE update summary report at Annual & Winter Meetings to include copy to 2019-2020 Annual meeting.](#)

Mr. Borges reported this MBO completed with the meeting minutes.

4. [Encourage Chapter Historians who don't attend their Regional CRC to complete the Chapter Historians Training Power Point & promote on-line workshop participation at CRCs.](#)

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Mr. Borges reported this MBO completed. The Power Point Historian's Training shown in Attachment E.

### 5. Foster collaboration with other international societies to improve our historical research and support history-related activities of the Society.

Mr. Borges reported to the committee his efforts to collaborate with similar groups such as CIBSE, AiCARR, CEN, IAR, AAR and GCCA.

Mr. Borges looked into the Engineering & Technology History Wiki, a consortium of engineering societies, ([ethw.org](http://ethw.org)) and found there would be a cost of \$3000 per year to participate. The Historical Committee does not currently have the budget for this therefore MBO #5 will be considered complete for 2020-2021 but Mr. Borges and Mr. Nagengast suggest that the committee consider pursuing this in the future.

### 6. Encourage younger members of ASHRAE to have interest in history-related activities of the Society.

Mr. Borges reported this MBO complete will the PAOE suggestions from the committee as shown in Attachment B.

### 7. Leadership Recall - arrange for videos at Annual Meeting 2021.

This MBO remains on-going. Due to Covid-19 the last three ASHRAE Conferences being virtual no interviews were conducted. The committee will continue efforts to schedule interviews when in-person meetings can resume. Mr. Nagengast reminded in-coming chair, Mr. Morasch, that transcripts of the interviews should be obtained and posted with the interview videos.

The Leadership Voices interview with Steve Comstock was not posted to the ASHRAE website as of June 3, 2021. An action Item was assigned to staff to request last recorded Leadership Voices interview with Mr. Steve Comstock was posted to the ASHRAE website. **(ACTION ITEM 3)**

*Secretary's Note: Completed June 3, 2021. Email request (Attachment F)*

### 8. Digitize archived Journals & Transactions.

This MBO will remain on-going and the committee will continue efforts to digitize ASHRAE material.

## 7. Action Items

The committee reviewed and reported on progress of action items from the January 15, 2021 meeting.

| <u>No.</u> | <u>Responsible</u> | <u>Action Item</u>  |
|------------|--------------------|---|
| 1          | Staff              | Posted Approved minutes from Meeting of June 9, 2020.<br><br><i>Complete.</i> |

## Historical Committee Minutes · Jun 3, 2021 · Virtual Meeting

- 2          Remington          Meet with a trained archivist to discuss the development of a “finding aid” for ASHRAE's archive.
- Unable to schedule for 2020-2021 but willing to continue efforts for 2021-2022*
- 3          Nagengast          Develop parameters and guidelines for content inclusion in ASHRAE's archive.
- Complete. (Attachment G)*
- 4          Feiner          Develop an outline for templates and procedures for document storage ASHRAE's archive.
- Complete. (Attachment H)*
- 5          Morasch          Develop an Historical Newsletter.
- This will be an on-going and continuous effort by the committee.*
- 6          Feiner          Develop a document reporting on diversity in ASHRAE and the HVACR industry.
- Complete. (Attachment H)*

### 8.          Historical Subcommittees

Historical Committee’s subcommittees report on actions and activities in the committee’s last meeting.

#### 8.1          Administrative/Archives

Mr. Nagengast gave a written report. (Attachment G)

There is no current guideline and material archived was done so with no set policy. A lack of a retention policy has resulted in the unfortunate loss of some valuable material. However significant historical material has been acquired, much of it funded by the Historical Committee. A comprehensive policy is still needed to ensure future material is not lost. Consideration of the following should be included in a policy:

- Selection:          Determination of importance.
- Storage:          Factors such as temperature, humidity, and container material.
- Digitization:          Which material, space needs/size reduction, format, periodic review with technological changes.
- Retention:          Length of time and review.

#### 8.2          Communications/Historians Guidelines

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Mr. Morasch stated, as in-coming chair, that the committee should develop and maintain an on-going quarterly newsletter for regional and chapter historians. The first newsletter release date is targeted for end of July 2021.

An action item was assigned to staff to locate a list of the RMCRs and send to the committee.  
**(ACTION ITEM 4)**

*Secretary's Note: Completed June 3, 2021. Emailed HC (Attachment I) & posted to Historical Committee Basecamp.*

### 8.3 Awards/Leadership Voices

Mr. Borges reported that there have been no Lou Flagg Award nominations this year. Mr. Morasch suggested sending out a reminder to regional and chapter historians. Mr. Nagengast commented this could be done with the newsletter.

## 9. New Business

Mr. Nagengast asked if the Historical Committee appointments had been made. An action item was assigned to staff to send out the 2021-2022 Historical Committee Roster. **(ACTION ITEM 5)**

*Secretary's Note: Completed June 3, 2021. Emailed HC & posted to Historical Committee Basecamp.*

Mr. Nagengast reminded the committee that the 125<sup>th</sup> Anniversary of ASRE will be in 2029 and the committee might want to begin making plans to develop projects for this historical milestone.

## 10. Other Business

Mr. Borges thanked the committee for the efforts this last year and expressed relief with the end of the Covid-19 restrictions. Committee members all expressed gratitude and best wishes for the next year. Mr. Nagengast and Mr. Borges also stated they would be available to help even though they are rolling off the committee.

## 11. Adjournment

Mr. Borges adjourned the meeting at 12:30 pm EDT.

## Historical Committee Minutes · Jun 3, 2021 · Virtual Meeting

### Action Items – Meeting of June 3, 2021

| <u>No.</u> | <u>Responsible</u> | <u>Action Item - June 3, 2021</u>   |
|------------|--------------------|---|
| 1          | Staff              | <p>Request approved minutes from Meeting of January 15, 2021 to the Historical Committee page of the ASHRAE website.</p> <p><i>Completed June 3, 2021.</i><br/><i>Request email (Attachment A of HC minutes – June 3, 2021)</i><br/><i>&amp; posted to Historical Committee Basecamp.</i></p> |
| 2          | Staff              | <p>Send Mr. Schwedler’s draft 2021-2022 PAOE requirements to committee members.</p> <p><i>Completed June 3, 2021.</i><br/><i>Emailed HC (Attachment D of HC minutes – June 3, 2021)</i><br/><i>&amp; posted to Historical Committee Basecamp.</i></p>   |
| 3          | Staff              | <p>Request Comstock Leadership Voices Interview be posted to ASHRAE website.</p> <p><i>Completed June 3, 2021</i><br/><i>Request email (Attachment F of HC minutes – June 3, 2021)</i></p>  |
| 4          | Staff              | <p>Send out RMCR list to committee.</p> <p><i>Completed June 3, 2021</i><br/><i>Emailed HC (Attachment I of HC minutes – June 3, 2021)</i><br/><i>&amp; posted to Historical Committee Basecamp.</i></p>  |
| 5          | Staff              | <p>Send 2021-2020 committee roster to the committee.</p> <p><i>Completed June 3, 2021</i><br/><i>Emailed HC &amp; posted to Historical Committee Basecamp.</i></p>  |

## Historical Committee Minutes · Jun 3, 2021 · Virtual Meeting

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| B 2020-2021 Historical Committee MBOs update                           | 9            |
| C PAOE Summary 2020-2021   | 10-26        |
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| F Request email to post Comstock Leadership Voices Interview           | 63           |
| G Nagengast Archives Report  | 64           |
| H Feiner Report  | 65-66        |
| I Email to HC with RMCR list ( <a href="#">list on Basecamp</a> )      | 67           |
| J Email to HC 2021-2022 HC roster ( <a href="#">list on Basecamp</a> ) | 68           |

**Harr, Julie**

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**From:** Harr, Julie  
**Sent:** Thursday, June 3, 2021 5:10 PM  
**To:** Jordan, Ally  
**Subject:** RE: Approved Historical Minutes - some more Jan 15, 2021  
**Attachments:** 2021-Jan 15 HC Min+Atts Virtual.pdf

Hi Ally,

Can you please post these approved minutes to the Historical Committee page of the website as well.

Thank you miss.

Best regards,  
Julie Harr

Julie Harr | Administrative Assistant/Permissions Administrator  
Extension: 1217



| Historical Committee 2020-2021 MBOs –Dean Borges Chair   |    |                                       |                       |                           |   |   |
|--|----|---------------------------------------|-----------------------|---------------------------|---|---|
| Objective  | PR | Comp. Date                            | Fiscal Impact         | Respon.                   | Status  | Comment   |
| 1. Develop proposals to improve the opportunities for Regional Historians to participate in Historical Committee activities.   | 1  | Winter 2021 Chicago                   | None                  | RVC Guideline subcom      | Continue to be Ongoing                                | With limited travel budgets, the committee will continue to encourage on-line participation of (RVCs) at committee meetings.  |
| 2. Develop PAOE Recommended Changes to 2021- 2022 PAOE   | 1  | 2021 Chicago                          | None                  |                           | Complete  | To get ahead of the PAOE Committee Cycle with proposal for the following year's PAOE Letter in Summer 2021  |
| 3. History VC PAOE Update Summary Report at Annual & Winter Meetings to include copy to 2019-2020 Annual meeting   | 1  | Winter & Annual                       | None                  | VC Report                 | Complete  | To encourage RVCs to target the below PAR performing Chapters in their Region based on the previous year's History PAOE Summary.  |
| 4. Encourage Chapter Historians who don't attend their Regional CRC to complete the Chapter Historians Training Power Point & promote on-line workshop participation at CRCs | 1  | Winter 2021                           | Minor                 | RVC Guideline subcom      | Complete  | Update the Chapter Historians Training PowerPoint. Add points for submittal of a completed MBO with phone discussion with RVC History prior August 30 of fiscal year. Promote on-line workshop participation at CRCs  |
| 5. Foster collaboration with other international societies to improve our historical research and support history-related activities of the Society                          | 4  | Summer 2021                           | None                  | Historical Committee      | Complete with efforts made. Suggest on-going efforts. | Continue work on collaboration. HC has links with similar groups in CIBSE & AiCARR - opportunity to pursue to work w/similar committees in CEN, International Institute of Ammonia Refrigeration (IIAR), International Institute of Refrigeration (IIR), & Global Cold Chain Alliance (GCCA). |
| 6. Encourage younger members of ASHRAE to have interest in history-related activities of the Society   | 2  | Summer 2021                           | None                  | Historical Committee      | Complete  | Proposing to keep the PAOE line item "For a local Chapter Historical activity performed by an actively engaged YEA member"  |
| 7. Leadership Recall Arrange for videos at Annual meeting 2021   | 2  | Summer 2021                           | Verify \$1,000 Budget | Historical Committee      | Complete for 2020-202                                 | Arrange 2 Presidential interviews. Review other potential interviewees  |
| 8. Digitize Archived Journals & Transactions   | 3  | Summer 2021                           | Major                 | Historical Committee/ PEC | Continue to be Ongoing                                | Encourage digitalization of all Society Journals & Transactions   |
| Jun 27–July 1, 2020 Austin, Tx   |    | Meetings were virtual due to Covid-19 |                       |                           |   | June 26-30, 2021, Phoenix, AZ   |

**HISTORY CHAIR PAOE SUMMARY REPORT  
Winter VIRTUAL MEETING 2020-2021**

| Regions          | Total History PAOE | Chapters @ "0" PAOE | Chapters @ MIN | Chapters @ PAR |
|------------------|--------------------|---------------------|----------------|----------------|
| I                | 2795               | 2                   | 13             | 0              |
| II               | 2025               | 2                   | 7              | 5              |
| III              | 250                | 9                   | 2              | 0              |
| IV               | 200                | 6                   | 1              | 0              |
| V                | 300                | 11                  | 1              | 1              |
| VI               | 50                 | 9                   | 0              | 0              |
| VII              | 3250               | 5                   | 8              | 4              |
| VIII             | 2850               | 4                   | 10             | 5              |
| IX               | 1525               | 7                   | 6              | 1              |
| X                | 3100               | 0                   | 14             | 0              |
| XI               | 300                | 10                  | 1              | 1              |
| XII              | 1075               | 11                  | 4              | 2              |
| XIII             | 1750               | 0                   | 10             | 1              |
| XIV              | 0                  | 9                   | 0              | 0              |
| Region- At-Large | 12725              | 1                   | 30             | 18             |

Grand Total 32195

| Top 10 in PAOE for History | Region | PAOE Pts |
|----------------------------|--------|----------|
| 1                          | RAL    | 12725    |
| 2                          | 7      | 3250     |
| 3                          | 10     | 3100     |
| 4                          | 8      | 2850     |
| 5                          | 1      | 2795     |
| 6                          | 2      | 2025     |
| 7                          | 13     | 1750     |
| 8                          | 9      | 1525     |
| 9                          | 12     | 1075     |
| 10                         | 5      | 300      |

| Top 10 CHAPTERS  | Top 10 History PAOE |
|------------------|---------------------|
| LOUISVILLE       | 1400                |
| TURKISH          | 1375                |
| BAHRAIN          | 1250                |
| ASHRAE BANGALORE | 1200                |
| NORTHERN NEVADA  | 950                 |
| QATAR ORYX       | 850                 |
| ASHRAE MUMBAI    | 650                 |
| AUSTIN           | 625                 |
| ASHRAE DECCAN    | 550                 |
| INDIA            | 550                 |

1. Each Regional Historian to reach out to Chapter Historians/Presidents with ZERO PAOE History points and help them get to Minimum PAOE of 100.
2. Each Regional Historian to reach out to Chapter Historians/Presidents with less than 300 PAR PAOE points and encourage them to get PAR.

## REGION I

### 2020-2021 Presidential Award of Excellence

\*Minimum and PAR points indicated are for 2020-2021

| Chapter code | Chapter name     | Chapter AAM | Historical:<br>Minimum 100;<br>PAR 300 | Membership<br>Promotion:<br>Minimum 500;<br>PAR 800 | Student Activities:<br>Minimum 300; PAR<br>800 | RP: Minimum 800;<br>PAR 1050 | Communications:<br>Minimum 250; PAR<br>600 | Chapter<br>Operations:<br>Minimum 600;<br>PAR 1200 | Chapter<br>Technology<br>Transfer:<br>Minimum<br>550; PAR 1050 | Government<br>Affairs :<br>Minimum 500;<br>PAR 650 | Young<br>Engineers in<br>ASHRAE:<br>Minimum 300;<br>PAR 800 | Chapter PAOE<br>pointTotals |  |
|--------------|------------------|-------------|--|---|--|------------------------------|--|--|--|--|---|-----------------------------|--|
| 1            | BOSTON           | 978         | 230                                    | 725   | 400  | 0                            | 580  | 130  | 0  | 150  | 875   | 3090                        |  |
| 3            | RHODE ISLAND     | 94          | 0                                      | 250   | 0  | 0                            | 0  | 10   | 0  | 0  | 150   | 410                         |  |
| 4            | CONNECTICUT      | 480         | 240                                    | 450   | 250  | 0                            | 730  | 385  | 1290   | 50   | 825   | 4220                        |  |
| 6            | LONG ISLAND      | 279         | 215                                    | 450   | 350  | 0                            | 0  | 20   | 0  | 0  | 775   | 1810                        |  |
| 7            | NEW JERSEY       | 554         | 220                                    | 600   | 200  | 0                            | 780  | 435  | 500  | 100  | 875   | 3710                        |  |
| 8            | NEW YORK         | 961         | 250                                    | 695   | 600  | 0                            | 0  | 265  | 1210   | 50   | 1475  | 4545                        |  |
| 9            | NORTHEAST        | 255         | 290                                    | 470   | 150  | 0                            | 0  | 135  | 0  | 0  | 1400  | 2445                        |  |
| 10           | CENTRAL NEW YORK | 230         | 215                                    | 150   | 350  | 0                            | 0  | 30   | 0  | 0  | 825   | 1570                        |  |
| 11           | ROCHESTER        | 246         | 125                                    | 325   | 200  | 0                            | 0  | 85   | 0  | 0  | 775   | 1510                        |  |
| 12           | NIAGARA FRONTIER | 183         | 230                                    | 245   | 200  | 0                            | 130  | 590  | 500  | 0  | 525   | 2420                        |  |
| 111          | CHAMPLAIN VALLEY | 127         | 100                                    | 50  | 335  | 0                            | 0  | 10   | 550  | 0  | 450   | 1495                        |  |
| 118          | MAINE            | 188         | 0                                      | 295   | 50   | 0                            | 0  | 20   | 0  | 0  | 425   | 790                         |  |
| 129          | TWIN TIERS       | 98          | 240                                    | 770   | 200  | 0                            | 430  | 580  | 550  | 50   | 700   | 3520                        |  |
| 146          | BI-STATE         | 198         | 225                                    | 420   | 200  | 0                            | 0  | 20   | 0  | 350  | 525   | 1740                        |  |
| 152          | GRANITE STATE    | 140         | 215                                    | 335   | 0  | 0                            | 0  | 30   | 0  | 0  | 400   | 980                         |  |
|              |                  | Total PAOE  | 2795                                   |   |  |                              |  |  |  |  |   |                             |  |
|              |                  | Avg PAOE    | 186                                    |   |  |                              |  |  |  |  |   |                             |  |

**REGION II**

2020-2021 Presidential Award of Excellence

\*Minimum and PAR points indicated are for 2020-2021

| Chapter code | Chapter name    | Chapter AAM | Historical:<br>Minimum 100; PAR<br>300 | Membership<br>Promotion:<br>Minimum 500;<br>PAR 800 | Student<br>Activities:<br>Minimum 300;<br>PAR 800 | RP:<br>Minimum<br>800; PAR<br>1050 | Communications:<br>Minimum 250;<br>PAR 600 | Chapter<br>Operations:<br>Minimum 600;<br>PAR 1200 | Chapter<br>Technology<br>Transfer:<br>Minimum 550;<br>PAR 1050 | Government<br>Affairs :<br>Minimum 500;<br>PAR 650 | Young<br>Engineers in<br>ASHRAE:<br>Minimum 300;<br>PAR 800 | ChapterPAOE<br>pointTotals |
|--------------|-----------------|-------------|--|---|---|------------------------------------|--|--|--|--|---|----------------------------|
| 13           | QUEBEC          | 163         | 0                                      | 500   | 400   | 0                                  | 0  | 700  | 0  | 100  | 850   | 2550                       |
| 14           | MONTREAL        | 534         | 300                                    | 700   | 1350  | 0                                  | 100  | 650  | 650  | 450  | 975   | 5175                       |
| 15           | OTTAWA VALLEY   | 411         | 250                                    | 395   | 800   | 0                                  | 100  | 60   | 1100   | 0  | 950   | 3655                       |
| 16           | TORONTO         | 1079        | 275                                    | 835   | 1250  | 0                                  | 550  | 70   | 0  | 300  | 1625  | 4905                       |
| 37           | HAMILTON        | 281         | 300                                    | 825   | 450   | 0                                  | 830  | 1440   | 2300   | 0  | 1225  | 7370                       |
| 100          | HALIFAX         | 193         | 0                                      | 435   | 150   | 0                                  | 250  | 10   | 0  | 0  | 850   | 1695                       |
| 116          | LONDON (CANADA) | 127         | 300                                    | 250   | 300   | 0                                  | 645  | 0  | 0  | 0  | 850   | 2345                       |
| 117          | NB/PEI          | 150         | 300                                    | 300   | 200   | 0                                  | 540  | 0  | 0  | 0  | 500   | 1840                       |
| 141          | WINDSOR         | 63          | 300                                    | 600   | 200   | 0                                  | 430  | 1275   | 300  | 750  | 850   | 4705                       |

Total PAOE            2025  
Avg PAOE                225

## REGION III

### 2020-2021 Presidential Award of Excellence

\*Minimum and PAR points indicated are for 2020-2021

| Chapter code | Chapter name         | Chapter AAM | Historical: Minimum 100; PAR 300 | Membership Promotion: Minimum 500; PAR 800 | Student Activities: Minimum 300; PAR 800 | RP: Minimum 800; PAR 1050 | Communications: Minimum 250; PAR 600 | Chapter Operations: Minimum 600; PAR 1200 | Chapter Technology Transfer: Minimum 550; PAR 1050 | Government Affairs : Minimum 500; PAR 650 | Young Engineers in ASHRAE: Minimum 300; PAR 800 | Chapter PAOE Point Totals |  |
|--------------|----------------------|-------------|----------------------------------|--|--|---------------------------|--------------------------------------|---|--|---|---|---------------------------|--|
| 21           | PHILADELPHIA         | 916         | 0                                | 860  | 250                                      | 0                         | 0                                    | 40  | 200  | 0   | 875   | 2225                      |  |
| 22           | CENTRAL PENNSYLVANIA | 355         | 0                                | 330  | 600                                      | 0                         | 0                                    | 75  | 1455   | 300                                       | 875   | 3635                      |  |
| 23           | JOHNSTOWN            | 57          | 0                                | 400  | 0  | 0                         | 0                                    | 0   | 200  | 0   | 400   | 1000                      |  |
| 24           | PITTSBURGH           | 294         | 150                              | 525  | 25                                       | 0                         | 250                                  | 50  | 400  | 50  | 1275  | 2725                      |  |
| 25           | BALTIMORE            | 699         | 0                                | 730  | 50                                       | 0                         | 520                                  | 295                                       | 340  | 100                                       | 875   | 2910                      |  |
| 26           | NATIONAL CAPITAL     | 980         | 0                                | 900  | 500                                      | 0                         | 0                                    | 270                                       | 200  | 0   | 1175  | 3045                      |  |
| 27           | HAMPTON ROADS        | 163         | 0                                | 450  | 0  | 0                         | 300                                  | 30  | 0  | 100                                       | 650   | 1530                      |  |
| 28           | RICHMOND             | 336         | 100                              | 510  | 857                                      | 0                         | 100                                  | 195                                       | 550  | 100                                       | 850   | 3262                      |  |
| 98           | LEHIGH VALLEY        | 128         | 0                                | 435  | 0  | 0                         | 0                                    | 10  | 300  | 0   | 600   | 1345                      |  |
| 125          | ROANOKE              | 154         | 0                                | 225  | 0  | 0                         | 0                                    | 60  | 200  | 0   | 600   | 1085                      |  |
| 134          | ANTHRACITE           | 94          | 0                                | 240  | 0  | 0                         | 40                                   | 85  | 100  | 0   | 250   | 715                       |  |
|              |                      | Total PAOE  | 250                              |  |  |                           |                                      |   |  |   |   |                           |  |
|              |                      | Avg PAOE    | 23                               |  |  |                           |                                      |   |  |   |   |                           |  |

## REGION IV

### 2020-2021 Presidential Award of Excellence

\*Minimum and PAR points indicated are for 2020-2021

| Chapter code | Chapter name      | Chapter AAM | Historical: Minimum 100; PAR 300 | Membership Promotion: Minimum 500; PAR 800 | Student Activities: Minimum 300; PAR 800 | RP: Minimum 800; PAR 1050 | Communications: Minimum 250; PAR 600 | Chapter Operations: Minimum 600; PAR 1200 | Chapter Technology Transfer: Minimum 550; PAR 1050 | Government Affairs : Minimum 500; PAR 650 | Young Engineers in ASHRAE: Minimum 300; PAR 800 | ChapterPAOE pointTotals |
|--------------|-------------------|-------------|----------------------------------|--|--|---------------------------|--------------------------------------|---|--|---|---|-------------------------|
| 29           | NORTH PIEDMONT    | 189         | 0                                | 25   | 400                                      | 0                         | 200                                  | 170                                       | 300  | 0   | 825   | 1920                    |
| 30           | SOUTHERN PIEDMONT | 371         | 0                                | 275  | 50                                       | 0                         | 0                                    | 80  | 0  | 0   | 1075  | 1480                    |
| 31           | SOUTH CAROLINA    | 141         | 0                                | 150  | 50                                       | 0                         | 0                                    | 0   | 200  | 0   | 675   | 1075                    |
| 32           | ATLANTA           | 988         | 200                              | 450  | 350                                      | 0                         | 710                                  | 635                                       | 400  | 350                                       | 1225  | 4320                    |
| 97           | GREENVILLE        | 187         | 0                                | 125  | 100                                      | 0                         | 0                                    | 20  | 0  | 0   | 300   | 545                     |
| 106          | TRIANGLE          | 472         | 0                                | 690  | 2295                                     | 0                         | 130                                  | 60  | 400  | 0   | 1425  | 5000                    |
| 113          | CHARLESTON        | 144         | 0                                | 175  | 0  | 0                         | 0                                    | 130                                       | 0  | 0   | 900   | 1205                    |

Total PAOE                    200  
Avg PAOE                        29

## REGION V

### 2020-2021 Presidential Award of Excellence

\*Minimum and PAR points indicated are for 2020-2021

| Chapter code | Chapter name     | Chapter AAM | Historical: Minimum 100; PAR 300 | Membership Promotion: Minimum 500; PAR 800 | Student Activities: Minimum 300; PAR 800 | RP: Minimum 800; PAR 1050 | Communications : Minimum 250; PAR 600 | Chapter Operations: Minimum 600; PAR 1200 | Chapter Technology Transfer: Minimum 550; PAR 1050 | Government Affairs : Minimum 500; PAR 650 | Young Engineers in ASHRAE: Minimum 300; PAR 800 | ChapterPAOEpointTotals |
|--------------|------------------|-------------|----------------------------------|--|--|---------------------------|---------------------------------------|---|--|---|---|------------------------|
| 38           | CLEVELAND        | 334         | 0                                | 185  | 50                                       | 0                         | 0                                     | 345                                       | 100  | 0   | 850   | 1530                   |
| 39           | COLUMBUS         | 371         | 0                                | 195  | 100                                      | 0                         | 0                                     | 40  | 0  | 0   | 650   | 985                    |
| 40           | CINCINNATI       | 258         | 0                                | 200  | 100                                      | 0                         | 0                                     | 0   | 0  | 0   | 650   | 950                    |
| 41           | DAYTON           | 199         | 0                                | 175  | 175                                      | 0                         | 450                                   | 10  | 0  | 0   | 450   | 1260                   |
| 42           | TOLEDO           | 118         | 0                                | 125  | 50                                       | 0                         | 0                                     | 50  | 0  | 150                                       | 450   | 825                    |
| 43           | CENTRAL INDIANA  | 346         | 0                                | 175  | 750                                      | 0                         | 0                                     | 70  | 0  | 0   | 1200  | 2195                   |
| 44           | EVANSVILLE       | 56          | 0                                | 100  | 0  | 0                         | 0                                     | 0   | 0  | 0   | 300   | 400                    |
| 45           | DETROIT          | 563         | 0                                | 380  | 350                                      | 0                         | 0                                     | 985                                       | 0  | 100                                       | 975   | 2790                   |
| 47           | WESTERN MICHIGAN | 333         | 300                              | 50   | 250                                      | 0                         | 0                                     | 1135                                      | 350  | 0   | 725   | 2810                   |
| 90           | AKRON/CANTON     | 154         | 0                                | 125  | 150                                      | 0                         | 0                                     | 0   | 0  | 0   | 825   | 1100                   |
| 103          | NORTHERN INDIANA | 78          | 0                                | 50   | 0  | 0                         | 0                                     | 10  | 0  | 0   | 650   | 710                    |
| 120          | FORT WAYNE       | 69          | 0                                | 580  | 0  | 0                         | 40                                    | 10  | 400  | 0   | 1225  | 2255                   |
|              |                  |             | Total PAOE                       | 300  |  |                           |                                       |   |  |   |   |                        |
|              |                  |             | Avg. per Chapter                 | 25   |  |                           |                                       |   |  |   |   |                        |

## REGION VI

2020-2021 Presidential Award of Excellence

\*Minimum and PAR points indicated are for 2020-2021

| Chapter code | Chapter name        | Chapter AAM | Historical: Minimum 100; PAR 300 | Membership Promotion: Minimum 500; PAR 800 | Student Activities: Minimum 300; PAR 800 | RP: Minimum 800; PAR 1050 | Communications: Minimum 250; PAR 600 | Chapter Operations: Minimum 600; PAR 1200 | Chapter Technology Transfer: Minimum 550; PAR 1050 | Government Affairs : Minimum 500; PAR 650 | Young Engineers in ASHRAE: Minimum 300; PAR 800 | Chapter PAOE pointTotals |
|--------------|---------------------|-------------|----------------------------------|--|--|---------------------------|--------------------------------------|---|--|---|---|--------------------------|
| 48           | WISCONSIN           | 337         | 50                               | 125  | 25                                       | 0                         | 150                                  | 1095                                      | 100  | 650                                       | 875   | 3070                     |
| 49           | ILLINOIS            | 1198        | 0                                | 485  | 700                                      | 0                         | 410                                  | 885                                       | 400  | 0   | 1175  | 4055                     |
| 50           | CENTRAL ILLINOIS    | 132         | 0                                | 0  | 150                                      | 0                         | 150                                  | 455                                       | 0  | 0   | 300   | 1055                     |
| 51           | IOWA                | 312         | 0                                | 125  | 250                                      | 0                         | 0                                    | 520                                       | 0  | 0   | 850   | 1745                     |
| 52           | MINNESOTA           | 846         | 50                               | 160  | 525                                      | 0                         | 460                                  | 1180                                      | 0  | 0   | 1250  | 3625                     |
| 54           | ST LOUIS            | 652         | 0                                | 175  | 450                                      | 0                         | 0                                    | 630                                       | 100  | 0   | 675   | 2030                     |
| 95           | MADISON             | 255         | 0                                | 125  | 250                                      | 0                         | 0                                    | 100                                       | 0  | 0   | 550   | 1025                     |
| 107          | NORTHEAST WISCONSIN | 152         | 0                                | 150  | 50                                       | 0                         | 0                                    | 20  | 0  | 0   | 650   | 870                      |
| 115          | LA CROSSE AREA      | 127         | 0                                | 175  | 100                                      | 0                         | 0                                    | 65  | 950  | 0   | 1250  | 2540                     |
| 123          | MISSISSIPPI VALLEY  | 100         | 0                                | 125  | 100                                      | 0                         | 0                                    | 0   | 0  | 0   | 650   | 875                      |
| 159          | CEDAR VALLEY        | 81          | 0                                | 125  | 0  | 0                         | 0                                    | 20  | 0  | 0   | 550   | 695                      |
| Total PAOE   |                     |             | 50                               |  |  |                           |                                      |   |  |   |   |                          |
| Avg. PAOE    |                     |             | 5                                |  |  |                           |                                      |   |  |   |   |                          |



## REGION VII

### 2020-2021 Presidential Award of Excellence

\*Minimum and PAR points indicated are for 2020-2021

| Chapter code | Chapter name      | Chapter AAM | Historical:<br>Minimum 100; PAR<br>300 | Membership<br>Promotion:<br>Minimum 500;<br>PAR 800 | Student<br>Activities:<br>Minimum 300;<br>PAR 800 | RP: Minimum 800;<br>PAR 1050 | Communication<br>s: Minimum<br>250; PAR 600 | Chapter Operations:<br>Minimum 600; PAR<br>1200 | Chapter<br>Technology<br>Transfer:<br>Minimum 550;<br>PAR 1050 | Government<br>Affairs :<br>Minimum 500;<br>PAR 650 | Young<br>Engineers in<br>ASHRAE:<br>Minimum<br>300; PAR 800 | ChapterPAOE<br>ointTotals |
|--------------|-------------------|-------------|--|---|---|------------------------------|---|---|--|--|---|---------------------------|
| 55           | LOUISVILLE        | 191         | 1400                                   | 225   | 50  | 0                            | 100   | 675   | 2650   | 50   | 725   | 5875                      |
| 56           | MEMPHIS           | 169         | 200                                    | 125   | 70  | 0                            | 0   | 170   | 200  | 0  | 850   | 1615                      |
| 57           | BIRMINGHAM        | 249         | 0                                      | 375   | 225   | 0                            | 630   | 1515  | 1400   | 0  | 950   | 5095                      |
| 58           | MOBILE            | 47          | 0                                      | 0   | 0   | 0                            | 0   | 160   | 0  | 0  | 750   | 910                       |
| 59           | NEW ORLEANS       | 121         | 350                                    | 125   | 0   | 0                            | 640   | 620   | 550  | 50   | 700   | 3035                      |
| 60           | BATON ROUGE       | 91          | 100                                    | 25  | 0   | 0                            | 0   | 200   | 300  | 0  | 550   | 1175                      |
| 61           | MISSISSIPPI       | 89          | 250                                    | 10  | 0   | 0                            | 0   | 100   | 400  | 0  | 575   | 1335                      |
| 88           | NASHVILLE         | 317         | 300                                    | 350   | 0   | 0                            | 810   | 560   | 200  | 0  | 675   | 2895                      |
| 99           | EAST TENNESSEE    | 219         | 0                                      | 100   | 200   | 0                            | 100   | 310   | 100  | 0  | 700   | 1510                      |
| 114          | TENNESSEE VALLEY  | 86          | 0                                      | 25  | 50  | 0                            | 250   | 160   | 700  | 0  | 450   | 1635                      |
| 128          | BLUEGRASS         | 111         | 250                                    | 25  | 50  | 0                            | 400   | 300   | 200  | 0  | 750   | 1975                      |
| 130          | NORTHWEST FLORIDA | 58          | 0                                      | 25  | 0   | 0                            | 0   | 150   | 0  | 0  | 100   | 275                       |
| 133          | NORTH ALABAMA     | 60          | 100                                    | 100   | 0   | 0                            | 250   | 100   | 0  | 0  | 100   | 650                       |
| 192          | WEST VIRGINIA     | 79          | 300                                    | 650   | 725   | 0                            | 590   | 850   | 400  | 800  | 1000  | 5315                      |

Total PAOE 3250

Avg. PAOE 232

## REGION VIII

2020-2021 Presidential Award of Excellence

\*Minimum and PAR points indicated are for 2020-2021

| Chapter code | Chapter name          | Chapter AAM | Historical: Minimum 100; PAR 300 | Membership Promotion: Minimum 500; PAR 800 | Student Activities: Minimum 300; PAR 800 | RP: Minimum 800; PAR 1050 | Communications: Minimum 250; PAR 600 | Chapter Operations: Minimum 600; PAR 1200 | Chapter Technology Transfer: Minimum 550; PAR 1050 | Government Affairs : Minimum 500; PAR 650 | Young Engineers in ASHRAE: Minimum 300; PAR 800 | ChapterPAOEpointTotals |
|--------------|-----------------------|-------------|----------------------------------|--|--|---------------------------|--------------------------------------|---|--|---|---|------------------------|
| 62           | ARKANSAS              | 234         | 300                              | 230  | 600                                      | 0                         | 945                                  | 2720                                      | 3039   | 50  | 975   | 8859                   |
| 64           | HOUSTON               | 729         | 350                              | 310  | 1516                                     | 0                         | 400                                  | 1265                                      | 400  | 500                                       | 825   | 5566                   |
| 65           | ALAMO                 | 231         | 100                              | 25   | 300                                      | 0                         | 0                                    | 10  | 400  | 0   | 775   | 1610                   |
| 66           | AUSTIN                | 367         | 625                              | 210  | 525                                      | 0                         | 0                                    | 315                                       | 0  | 0   | 1100  | 2775                   |
| 67           | DALLAS                | 724         | 100                              | 500  | 519                                      | 0                         | 406                                  | 980                                       | 650  | 0   | 1000  | 4155                   |
| 68           | CENTRAL OKLAHOMA      | 279         | 475                              | 405  | 845                                      | 0                         | 200                                  | 1840                                      | 700  | 300                                       | 950   | 5715                   |
| 69           | NORTHEASTERN OKLAHOMA | 188         | 100                              | 185  | 200                                      | 0                         | 620                                  | 70  | 1200   | 0   | 600   | 2975                   |
| 70           | FORT WORTH            | 296         | 375                              | 175  | 450                                      | 0                         | 0                                    | 80  | 820  | 100                                       | 900   | 2900                   |
| 71           | WEST TEXAS            | 80          | 0                                | 100  | 100                                      | 0                         | 0                                    | 0   | 0  | 0   | 450   | 650                    |
| 91           | EAST TEXAS            | 115         | 100                              | 300  | 100                                      | 0                         | 0                                    | 85  | 0  | 0   | 750   | 1335                   |
| 154          | SOUTH TEXAS           | 60          | 0                                | 0  | 325                                      | 0                         | 0                                    | 60  | 0  | 0   | 275   | 660                    |
| 165          | MEXICO CITY           | 102         | 0                                | 250  | 395                                      | 0                         | 160                                  | 310                                       | 200  | 700                                       | 475   | 2490                   |
| 166          | MONTERREY             | 130         | 225                              | 455  | 325                                      | 0                         | 0                                    | 0   | 400  | 0   | 825   | 2230                   |
| 173          | GUADALAJARA           | 26          | 0                                | 0  | 0  | 0                         | 0                                    | 50  | 0  | 0   | 0   | 50                     |
| 208          | NORTHWEST ARKANSAS    | 129         | 100                              | 125  | 420                                      | 0                         | 100                                  | 250                                       | 200  | 50  | 800   | 2045                   |
|              |                       |             | PAOE Total                       | 2850                                       |  |                           |                                      |   |  |   |   |                        |
|              |                       |             | Avg. PAOE                        | 190  |  |                           |                                      |   |  |   |   |                        |

## REGION IX

### 2020-2021 Presidential Award of Excellence

\*Minimum and PAR points indicated are for 2020-2021

| Chapter code | Chapter name   | Chapter AAM | Historical:<br>Minimum 100;<br>PAR 300 | Membership<br>Promotion:<br>Minimum 500;<br>PAR 800 | Student<br>Activities:<br>Minimum 300;<br>PAR 800 | RP: Minimum 800;<br>PAR 1050 | Communications:<br>Minimum 250; PAR<br>600 | Chapter<br>Operations:<br>Minimum 600; PAR<br>1200 | Chapter<br>Technology<br>Transfer:<br>Minimum 550;<br>PAR 1050 | Government<br>Affairs : Minimum<br>500; PAR 650 | Young Engineers<br>in ASHRAE:<br>Minimum 300;<br>PAR 800 | ChapterPAOEpointTotals |
|--------------|----------------|-------------|--|---|---|------------------------------|--|--|--|---|--|------------------------|
| 53           | KANSAS CITY    | 628         | 250                                    | 310   | 600   | 0                            | 0  | 685  | 1000   | 600   | 925  | 4370                   |
| 72           | EL PASO        | 51          | 0                                      | 150   | 0   | 0                            | 0  | 10   | 0  | 0   | 50   | 210                    |
| 73           | ROCKY MOUNTAIN | 942         | 0                                      | 585   | 450   | 0                            | 0  | 360  | 0  | 350   | 1025   | 2770                   |
| 74           | UTAH           | 318         | 200                                    | 200   | 50  | 0                            | 0  | 2240   | 300  | 350   | 1275   | 4615                   |
| 75           | NEBRASKA       | 376         | 225                                    | 250   | 525   | 0                            | 710  | 2765   | 1600   | 400   | 1250   | 7725                   |
| 76           | WICHITA        | 134         | 0                                      | 50  | 100   | 0                            | 150  | 0  | 0  | 0   | 600  | 900                    |
| 77           | NEW MEXICO     | 156         | 200                                    | 175   | 0   | 0                            | 0  | 30   | 0  | 350   | 500  | 1255                   |
| 93           | SOUTH DAKOTA   | 126         | 450                                    | 350   | 100   | 0                            | 0  | 520  | 0  | 350   | 400  | 2170                   |
| 127          | BLACK HILLS    | 48          | 0                                      | 50  | 50  | 0                            | 0  | 0  | 0  | 0   | 100  | 200                    |
| 131          | BIG SKY        | 121         | 200                                    | 75  | 150   | 0                            | 250  | 160  | 450  | 0   | 650  | 1935                   |
| 135          | IDAHO          | 166         | 0                                      | 110   | 50  | 0                            | 0  | 10   | 0  | 350   | 550  | 1070                   |
| 148          | PIKES PEAK     | 117         | 0                                      | 185   | 0   | 0                            | 0  | 435  | 0  | 350   | 800  | 1770                   |
| 150          | OZARKS         | 75          | 0                                      | 80  | 0   | 0                            | 0  | 0  | 0  | 250   | 350  | 680                    |
| Total PAOE   |                |             | 1525                                   |   |   |                              |  |  |  |   |  |                        |
| Avg. PAOE    |                |             | 117                                    |   |   |                              |  |  |  |   |  |                        |

## REGION X

### 2020-2021 Presidential Award of Excellence

\*Minimum and PAR points indicated are for 2020-2021

| Chapter code | Chapter name        | Chapter AAM | Historical: Minimum 100; PAR 300 | Membership Promotion: Minimum 500; PAR 800 | Student Activities: Minimum 300; PAR 800 | RP: Minimum 800; PAR 1050 | Communications: Minimum 250; PAR 600 | Chapter Operations: Minimum 600; PAR 1200 | Chapter Technology Transfer: Minimum 550; PAR 1050 | Government Affairs : Minimum 500; PAR 650 | Young Engineers in ASHRAE: Minimum 300; PAR 800 | ChapterPAOEpointTotals |
|--------------|---------------------|-------------|----------------------------------|--|--|---------------------------|--------------------------------------|---|--|---|---|------------------------|
| 81           | SACRAMENTO VALLEY   | 282         | 150                              | 75   | 200                                      | 0                         | 50                                   | 40  | 500  | 0   | 1025  | 2040                   |
| 82           | GOLDEN GATE         | 866         | 150                              | 310  | 350                                      | 0                         | 200                                  | 560                                       | 450  | 600                                       | 1025  | 3645                   |
| 83           | SAN JOAQUIN         | 115         | 150                              | 25   | 150                                      | 0                         | 0                                    | 70  | 0  | 100                                       | 550   | 1045                   |
| 84           | SOUTHERN CALIFORNIA | 664         | 150                              | 385  | 450                                      | 0                         | 0                                    | 160                                       | 500  | 100                                       | 1025  | 2770                   |
| 85           | SAN DIEGO           | 356         | 150                              | 260  | 250                                      | 0                         | 150                                  | 160                                       | 1200   | 200                                       | 925   | 3295                   |
| 86           | CENTRAL ARIZONA     | 439         | 150                              | 310  | 480                                      | 0                         | 0                                    | 50  | 200  | 100                                       | 1625  | 2915                   |
| 87           | TUCSON              | 94          | 250                              | 25   | 300                                      | 0                         | 0                                    | 150                                       | 500  | 100                                       | 700   | 2025                   |
| 92           | SOUTHERN NEVADA     | 144         | 150                              | 225  | 772                                      | 0                         | 600                                  | 720                                       | 0  | 300                                       | 725   | 3492                   |
| 101          | SAN JOSE            | 322         | 250                              | 345  | 550                                      | 0                         | 100                                  | 425                                       | 950  | 100                                       | 1375  | 4095                   |
| 105          | ORANGE EMPIRE       | 392         | 150                              | 300  | 300                                      | 0                         | 0                                    | 50  | 200  | 0   | 1175  | 2175                   |
| 108          | HAWAII              | 251         | 150                              | 510  | 150                                      | 0                         | 70                                   | 870                                       | 1550   | 100                                       | 900   | 4300                   |
| 126          | NORTHERN NEVADA     | 101         | 950                              | 0  | 200                                      | 0                         | 0                                    | 20  | 0  | 0   | 550   | 1720                   |
| 144          | SIERRA DELTA        | 46          | 150                              | 320  | 100                                      | 0                         | 0                                    | 400                                       | 200  | 150                                       | 250   | 1570                   |
| 155          | TRI COUNTY          | 76          | 150                              | 125  | 150                                      | 0                         | 0                                    | 10  | 0  | 0   | 100   | 535                    |
| Total PAOE   |                     |             | 3100                             |  |  |                           |                                      |   |  |   |   |                        |
| Avg. PAOE    |                     |             | 221                              |  |  |                           |                                      |   |  |   |   |                        |



## REGION XII

### 2020-2021 Presidential Award of Excellence

\*Minimum and PAR points indicated are for 2020-2021

| Chapter code | Chapter name       | Chapter AAM | Historical: Minimum 100; PAR 300 | Membership Promotion: Minimum 500; PAR 800 | Student Activities: Minimum 300; PAR 800 | RP: Minimum 800; PAR 1050 | Communications: Minimum 250; PAR 600 | Chapter Operations: Minimum 600; PAR 1200 | Chapter Technology Transfer: Minimum 550; PAR 1050 | Government Affairs : Minimum 500; PAR 650 | Young Engineers in ASHRAE: Minimum 300; PAR 800 | Chapter PAOE pointTotals |
|--------------|--------------------|-------------|----------------------------------|--|--|---------------------------|--------------------------------------|---|--|---|---|--------------------------|
| 34           | JACKSONVILLE       | 244         | 0                                | 515  | 150                                      | 0                         | 0                                    | 60  | 0  | 0   | 675   | 1400                     |
| 35           | FLORIDA WEST COAST | 412         | 0                                | 370  | 250                                      | 0                         | 275                                  | 630                                       | 750  | 100                                       | 1025  | 3400                     |
| 36           | MIAMI              | 213         | 0                                | 160  | 150                                      | 0                         | 0                                    | 0   | 200  | 0   | 500   | 1010                     |
| 94           | CENTRAL FLORIDA    | 340         | 150                              | 380  | 300                                      | 0                         | 1020                                 | 545                                       | 1670   | 350                                       | 800   | 5215                     |
| 104          | GOLD COAST         | 197         | 0                                | 200  | 100                                      | 0                         | 0                                    | 50  | 100  | 0   | 500   | 950                      |
| 110          | PUERTO RICO        | 86          | 0                                | 100  | 100                                      | 0                         | 0                                    | 0   | 200  | 0   | 100   | 500                      |
| 139          | SOUTHWEST FLORIDA  | 127         | 0                                | 75   | 250                                      | 0                         | 0                                    | 270                                       | 1150   | 400                                       | 200   | 2345                     |
| 172          | BRASIL             | 182         | 150                              | 160  | 1302                                     | 0                         | 520                                  | 1560                                      | 600  | 650                                       | 1375  | 6317                     |
| 178          | ARGENTINA          | 132         | 0                                | 75   | 745                                      | 0                         | 1170                                 | 1425                                      | 400  | 500                                       | 1625  | 5940                     |
| 190          | COLOMBIA           | 66          | 300                              | 0  | 500                                      | 0                         | 0                                    | 1065                                      | 150  | 150                                       | 550   | 2715                     |
| 196          | CHILE              | 60          | 50                               | 25   | 300                                      | 0                         | 250                                  | 300                                       | 1000   | 0   | 450   | 2375                     |
| 199          | ECUADOR            | 41          | 0                                | 45   | 275                                      | 0                         | 0                                    | 0   | 100  | 0   | 600   | 1020                     |
| 202          | PARAGUAY           | 46          | 425                              | 5  | 200                                      | 0                         | 150                                  | 630                                       | 650  | 350                                       | 450   | 2860                     |
| 209          | ASHRAE CARICOM     | 75          | 0                                | 200  | 650                                      | 0                         | 0                                    | 20  | 600  | 300                                       | 1600  | 3370                     |
| 213          | SOUTH BRAZIL       | 65          | 0                                | 485  | 1325                                     | 0                         | 410                                  | 525                                       | 1750   | 100                                       | 1975  | 6570                     |
| 220          | Peru               | 106         | 0                                | 115  | 50                                       | 0                         | 0                                    | 200                                       | 100  | 0   | 775   | 1240                     |

Total PAOE                    1075  
Avg. PAOE                        67

## REGION XIII

2020-2021 Presidential Award of Excellence

\*Minimum and PAR points indicated are for 2020-2021

| Chapter code | Chapter name | Chapter AAM | Historical:<br>Minimum 100; PAR 300 | Membership Promotion:<br>Minimum 500; PAR 800 | Student Activities:<br>Minimum 300; PAR 800 | RP:<br>Minimum 800; PAR 1050 | Communications:<br>Minimum 250; PAR 600 | Chapter Operations:<br>Minimum 600; PAR 1200 | Chapter Technology Transfer:<br>Minimum 550; PAR 1050 | Government Affairs :<br>Minimum 500; PAR 650 | Young Engineers in ASHRAE:<br>Minimum 300; PAR 800 | ChapterPAOEpointTotals |
|--------------|--------------|-------------|-------------------------------------|---|---|------------------------------|---|--|---|--|--|------------------------|
| 142          | SINGAPORE    | 341         | 150                                 | 605   | 350   | 0                            | 1040                                    | 930  | 1750  | 550  | 725  | 6100                   |
| 143          | HONG KONG    | 757         | 150                                 | 950   | 1100  | 0                            | 150                                     | 50   | 2150  | 350  | 1800   | 6700                   |
| 149          | MALAYSIA     | 218         | 450                                 | 570   | 835   | 0                            | 250                                     | 1425   | 1800  | 1050   | 1375   | 7755                   |
| 157          | TAIWAN       | 117         | 150                                 | 805   | 675   | 0                            | 1950                                    | 2420   | 300   | 1600   | 500  | 8400                   |
| 167          | PHILIPPINES  | 181         | 150                                 | 500   | 100   | 0                            | 100                                     | 60   | 300   | 300  | 675  | 2185                   |
| 170          | THAILAND     | 96          | 150                                 | 125   | 50  | 0                            | 0                                       | 20   | 1100  | 300  | 350  | 2095                   |
| 183          | INDONESIA    | 108         | 100                                 | 150   | 50  | 0                            | 0                                       | 450  | 300   | 350  | 1425   | 2825                   |
| 194          | JAPAN        | 210         | 150                                 | 100   | 100   | 0                            | 0                                       | 90   | 300   | 150  | 400  | 1290                   |
| 195          | SOUTH KOREA  | 86          | 150                                 | 125   | 50  | 0                            | 0                                       | 10   | 0   | 150  | 150  | 635                    |
| 198          | MACAO        | 90          | 150                                 | 750   | 0   | 0                            | 570                                     | 0  | 300   | 1750   | 1050   | 4570                   |

Total PAOE                    1750  
Avg. PAOE                        175





## REGION-AT-LARGE

2020-2021 Presidential Award of Excellence

\*Minimum and PAR points indicated are for 2020-2021

| Chapter code | Chapter name      | Chapter AAM | Historical:<br>Minimum 100;<br>PAR 300 | Membership<br>Promotion:<br>Minimum 500;<br>PAR 800 | Student Activities:<br>Minimum 300;<br>PAR 800 | RP:<br>Minimum<br>800; PAR<br>1050 | Communications:<br>Minimum 250; PAR<br>600 | Chapter Operations:<br>Minimum 600; PAR<br>1200 | Chapter<br>Technology<br>Transfer:<br>Minimum 550;<br>PAR 1050 | Government Affairs :<br>Minimum 500; PAR<br>650 | Young<br>Engineers in<br>ASHRAE:<br>Minimum 300;<br>PAR 800 | ChapterPAOE<br>ointTotals |
|--------------|-------------------|-------------|--|---|--|------------------------------------|--|---|--|---|---|---------------------------|
| 158          | INDIA             | 217         | 550                                    | 125   | 1475   | 0                                  | 200  | 110   | 750  | 150   | 925   | 4285                      |
| 160          | SAUDI ARABIA      | 181         | 100                                    | 135   | 50   | 0                                  | 0  | 210   | 300  | 0   | 1025  | 1820                      |
| 161          | CAIRO             | 103         | 200                                    | 280   | 300  | 0                                  | 0  | 0   | 0  | 0   | 1550  | 2330                      |
| 162          | LEBANESE          | 106         | 200                                    | 0   | 0  | 0                                  | 0  | 20  | 0  | 0   | 250   | 470                       |
| 163          | WESTERN INDIA     | 91          | 350                                    | 0   | 580  | 0                                  | 430  | 755   | 200  | 0   | 650   | 2965                      |
| 164          | KUWAIT            | 51          | 100                                    | 75  | 200  | 0                                  | 0  | 10  | 0  | 0   | 775   | 1160                      |
| 169          | ASHRAE BANGALORE  | 88          | 1200                                   | 100   | 355  | 0                                  | 0  | 0   | 400  | 150   | 1075  | 3280                      |
| 171          | SRI LANKAN        | 91          | 350                                    | 75  | 200  | 0                                  | 0  | 0   | 0  | 0   | 550   | 1175                      |
| 174          | PAKISTAN          | 89          | 350                                    | 10  | 50   | 0                                  | 0  | 10  | 0  | 0   | 575   | 995                       |
| 175          | ASHRAE FALCON     | 460         | 300                                    | 135   | 300  | 0                                  | 0  | 50  | 0  | 0   | 675   | 1460                      |
| 179          | NORTHERN PAKISTAN | 55          | 200                                    | 125   | 400  | 0                                  | 0  | 0   | 400  | 0   | 500   | 1625                      |
| 181          | BAHRAIN           | 49          | 1250                                   | 505   | 320  | 0                                  | 500  | 395   | 700  | 0   | 1725  | 5395                      |
| 184          | QATAR ORYX        | 157         | 850                                    | 135   | 0  | 0                                  | 0  | 10  | 0  | 0   | 475   | 1470                      |
| 185          | CHENNAI           | 82          | 100                                    | 150   | 0  | 0                                  | 0  | 0   | 0  | 0   | 575   | 825                       |
| 186          | PUNE              | 101         | 300                                    | 580   | 0  | 0                                  | 0  | 10  | 900  | 0   | 1300  | 3090                      |
| 187          | ASHRAE NIGERIA    | 135         | 150                                    | 595   | 200  | 0                                  | 0  | 1200  | 850  | 0   | 1175  | 4170                      |
| 188          | ASHRAE MUMBAI     | 125         | 650                                    | 365   | 150  | 0                                  | 400  | 1945  | 200  | 200   | 550   | 4460                      |
| 189          | CENTRAL PAKISTAN  | 62          | 200                                    | 50  | 50   | 0                                  | 100  | 325   | 400  | 50  | 600   | 1775                      |
| 191          | ASHRAE DECCAN     | 61          | 550                                    | 25  | 875  | 0                                  | 380  | 1075  | 800  | 0   | 350   | 4055                      |
| 193          | TURKISH           | 100         | 1375                                   | 325   | 1350   | 0                                  | 700  | 1060  | 950  | 50  | 775   | 6585                      |
| 197          | BANGLADESH        | 45          | 400                                    | 50  | 0  | 0                                  | 0  | 0   | 0  | 0   | 600   | 1050                      |
| 207          | SOUTH AFRICA      | 156         | 350                                    | 615   | 0  | 0                                  | 490  | 1050  | 0  | 1150  | 500   | 4155                      |
| 210          | FAISALABAD        | 32          | 100                                    | 0   | 0  | 0                                  | 0  | 0   | 0  | 0   | 550   | 650                       |
| 211          | PYRAMIDS          | 75          | 750                                    | 225   | 0  | 0                                  | 0  | 10  | 0  | 600   | 975   | 2560                      |
| 212          | JORDAN            | 49          | 100                                    | 50  | 0  | 0                                  | 0  | 0   | 0  | 0   | 150   | 300                       |
| 215          | EAST INDIA        | 52          | 300                                    | 50  | 0  | 0                                  | 0  | 0   | 0  | 0   | 775   | 1125                      |
| 216          | RAJASTHAN         | 54          | 900                                    | 180   | 250  | 0                                  | 1250                                       | 2550  | 2310   | 300   | 350   | 8090                      |
| 217          | CHANDIGARH        | 73          | 300                                    | 60  | 800  | 0                                  | 0  | 0   | 0  | 0   | 900   | 2060                      |
| 218          | OMAN              | 43          | 100                                    | 50  | 0  | 0                                  | 0  | 10  | 150  | 0   | 400   | 710                       |
| 219          | LIBYA             | 40          | 100                                    | 0   | 0  | 0                                  | 0  | 0   | 0  | 0   | 100   | 200                       |
| 221          | Sudan             | 50          | 0                                      | 10  | 0  | 0                                  | 0  | 0   | 0  | 0   | 300   | 310                       |

Total PAOE 12725

1/11/2021

| PAOE for History | Region | PAOE Pts |
|------------------|--------|----------|
| 1                | RAL    | 12725    |
| 2                | 7      | 3250     |
| 3                | 10     | 3100     |
| 4                | 8      | 2850     |
| 5                | 1      | 2795     |
| 6                | 2      | 2025     |
| 7                | 13     | 1750     |
| 8                | 9      | 250      |
| 9                | 12     | 1075     |
| 10               | 5      | 300      |

| Highest Chapters | PAOE History | Members | POINTS PER MEMBER |
|------------------|--------------|---------|-------------------|
| LOUISVILLE       | 1400         | 191     | 7.33              |
| TURKISH          | 1375         | 100     | 13.75             |
| BAHRAIN          | 1250         | 49      | 25.51             |
| ASHRAE BANGALORE | 1200         | 88      | 13.64             |
| NORTHERN NEVADA  | 950          | 101     | 9.41              |
| QATAR ORYX       | 850          | 157     | 5.41              |
| ASHRAE MUMBAI    | 650          | 125     | 5.20              |
| AUSTIN           | 625          | 367     | 1.70              |
| ASHRAE DECCAN    | 550          | 61      | 9.02              |
| INDIA            | 550          | 217     | 2.53              |
| MALAYSIA         | 450          | 218     | 2.06              |
| SOUTH DAKOTA     | 450          | 126     | 3.57              |

**Harr, Julie**

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**From:** Harr, Julie  
**Sent:** Thursday, June 3, 2021 12:58 PM  
**To:** deanborges@aol.com; smorasch@firstenergycorp.com; abiyik@gazi.edu.tr; niss@deltatdesigns.ca; berannag@hotmail.com; glennremington@live.com; todorobranko@gmail.com; ahmed.alaa@ashraeuae.org; plantguy24@me.com  
**Subject:** FW: 2021-22 Final Draft PAOE  
**Attachments:** 2021-22PAOEDraft-Schwedler2021-04-13.docx

Gentlemen:

Here are the PAOE document.

Bets regards,  
Julie Harr

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**From:** Grant, Vickie <vgrant@ashrae.org>  
**Sent:** Thursday, June 3, 2021 12:50 PM  
**To:** Harr, Julie <JHarr@ashrae.org>  
**Subject:** 2021-22 Final Draft PAOE

Hi Julie – see attached.

Attached is the final draft 2021-22 PAOE for Mick Schwedler's presidential year. Please note that possible revisions were made to recommendations submitted during the winter meeting. Also, for any PAOE category grouped into one (1) line item, those sections are now converted into individual line items for tracking purposes. For example: if line item 3 read CO3, a. b. c., it now reads, CO3.1, CO3.2, CO3.3.

Feel free to use the attached for the upcoming spring CRC workshop presentations. The final, final PAOE will be distributed to all in July after the area assigned members are established and the cover letter from Mick is included. Let me know if you have any questions. Thank you.

Vickie

## 2021-22 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

### CHAPTER OPERATIONS CATEGORY

|   |                         |
|---|-------------------------|
| <b>MINIMUM: 600 POINTS</b> (Plus CIQ in 60 days prior to CRC; exception may be made by the DRC. The completed CIQ will represent the incoming chapter officers and chapter committee chairs for the next Society year.) | <b>PAR: 1200 POINTS</b> |
|---|-------------------------|

**Explanation to reach Minimum for Chapter Operations:** To reach minimum, the Chapter Information Questionnaire (CIQ) must be complete and forwarded to DRC and Society 60 days prior to CRC. The completed CIQ will represent the incoming chapter officers and chapter committee chairs for the next Society year. The DRC is responsible for determining if criteria are met. All individuals serving in a chapter position must be an ASHRAE Member or Associate grade member (except Webmaster and Newsletter Editor who can be a student member; Affiliate grade for YEA). No person can serve in more than one officer position (exception, two positions for chapter with less than 75 members). A chapter officer may also serve in one committee chair position.

**Presidential Initiatives:**

|       |                                  |   |
|-------|----------------------------------|---|
| CO1   | 200 points; (200 points maximum) | If the entire Chapter Board of Governors view the following two videos (Note: Board of Governors must be listed in the CIQ):<br><br>Part 1: Sexual Harassment Prevention Training <a href="https://www.youtube.com/watch?v=sL7LwBsV9bM">https://www.youtube.com/watch?v=sL7LwBsV9bM</a><br>Part 2: Sexual Harassment Prevention Training: Case Studies: <a href="https://www.youtube.com/watch?v=1za7gs9S2H0">https://www.youtube.com/watch?v=1za7gs9S2H0</a>   |
| CO2   | 500 points; (500 points maximum) | For establishing and maintaining a Chapter Sustainability Committee that meets periodically and organizes sustainability activities each year   |
| CO3.1 | 150 points each; (no maximum)    | For a chapter program or chapter sponsored educational seminar with a clearly defined sustainability theme (e.g. energy efficiency, indoor air quality, high-performance buildings, emitted / embodied carbon)  |
| CO3.2 | 500 points each; (no maximum)    | For a chapter sponsored community sustainability project  |
| CO3.3 | 150 points each; (no maximum)    | For a chapter creating a grassroots program specific to the needs of the local community or a non-profit organization (To qualify, the chapter event or program must include scope of supporting a local utility or institutional organization, to provide training for improvements to areas such as building operations, while improving indoor environments and wellness in buildings in the community, etc. This would include publicity (outside of normal Chapter advertisements) that includes print, audio or electronic media at local, state, provincial, national or industry level promotion of the work of ASHRAE and/or local chapter.) |

**Please note for Sustainability Points:** A Chapter Sustainability Award is available for each chapter that obtains a minimum total of 500 points from the items listed above under Presidential Initiatives. The chapter with the highest PAOE sustainability point total will receive a Regional award (excludes the Community Sustainability Project points).

|     |   |  |
|-----|---|--|
| CO4 | 50 points; (no maximum)                     | For each job fair that is held in-person or virtually that a chapter hosts or co-hosts with another chapter (or other entity) that has a minimum of five companies in attendance   |
| CO5 | 5 points per time; (50 points maximum)      | For each promotion of the ASHRAE Jobs Board in the Chapter Newsletter  |
| CO6 | 5 points per attendee; (100 points maximum) | For each chapter officer who meets a first time attendee, welcomes them to the chapter meeting and introduces them to other chapter members at a chapter meeting ( <i>Chapter to provide tally sheet to first time attendee for validation.</i> )  |
| CO7 | 50 points; (150 points maximum)             | For each joint meeting with the chapter's partner chapter from a different region  |
| CO8 | 50 points; (150 points maximum)             | For each sponsorship activity supporting various women in engineering organizations and activities such as National Women in Engineering Day <b>OR</b> for each sponsorship activity supporting Diversity, Equity and Inclusion related activities |

**Efficient use of volunteers' time:**

|      |                                       |  |
|------|---------------------------------------|--|
| CO9  | 50 points; (50 points maximum)        | For conducting chapter planning meeting prior to August 1 (all officers and committee chairs) (Note: Requires Chapters to provide a report of the plan to their DRC by August 1 to receive credit for this effort in addition to reporting into the PAOE accounting system.) |
| CO10 | 5 points/person; (500 points maximum) | For a chapter presentation by the Chapter President on "This is ASHRAE presentation"   |
| CO11 | 25 points; (25 maximum)               | For the Chapter Nominations Committee meeting and bringing completed CRC Nominations Worksheet to the Region's Caucus  |
| CO12 | 50 points; (100 points maximum)       | For each ASHRAE Core Value chapter activity (Excellence, Commitment, Integrity, Collaboration, Volunteerism, Diversity) typically soft skills presentation, lecture or activity with the main subject addressing one or more of the core values                              |

## 2021-22 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

| <b>Meetings:</b>                     |   |  |
|--------------------------------------|---|--|
| CO13                                 | 50 points; (500 points maximum)   | For each chapter meeting with a committee theme and associated activities and announcements  |
| CO14                                 | 100 points; (100 points maximum)  | If annual attendance at meetings (including virtual meetings), exceeds that of previous year by at least 10% (Attendance includes total for dinner, lunch or breakfast meetings where minimum 45 minutes business or technical presentation or panel discussion is held for continuing education.)   |
| CO15                                 | 100 points; (100 points maximum)  | For presenting the Technical Activities Committee presentation at chapter meeting  |
| CO16                                 | 100 points; (100 points maximum)  | For a chapter presentation by a Chapter Officer on the 2019-2024 Strategic Plan by November 30 (power point to be provided by the Society Planning Committee) ( <a href="#">click here for current Strategic Plan</a> )  |
| CO17                                 | 75 points; (300 points maximum)   | For organizing an employer recognition, one-on-one meeting, company presentation and/or employer recognition/ dialogue/roundtable event to promote the benefits of ASHRAE membership for company members and solicit feedback on how ASHRAE and the local chapter can better serve the company (Points doubled if event includes a visiting Regional Officer, Society Officer or Board of Directors member.) |
| CO18                                 | 50 points (no maximum)  | For establishing or maintaining an operating Section or Group (each Section or Group)  |
| CO19                                 | 10 points; (no maximum)   | For each chapter member who registers for a Winter or Annual Society meeting   |
| <b>Honors and Awards Activities:</b> |   |  |
| CO20                                 | 25 points; (25 points maximum)  | For establishing and maintaining a chapter Honors and Awards Committee   |
| CO21                                 |   | For each individual award nomination with the appropriate documentation in accordance with the procedures stated on the ASHRAE website and as follows (No maximum; see line items points below.):  |
| CO21.1                               | 100 points; (no maximum)  | Fellow nominations   |
| CO21.2                               | 100 points; (no maximum)  | Individual award nominations for the following: F. Paul Anderson Award, Louise and Bill Holladay Distinguished Fellow Award, Fellow Nominations, Andrew T. Boggs Service Award, ASHRAE Hall of Fame, ASHRAE Pioneers of the Industry Award, E.K. Campbell Award of Merit and Honorary Member   |
| CO21.3                               | 75 points; (no maximum)   | ESA nominations  |
| CO21.4                               | 50 points; (no maximum)   | DSA nominations  |
| CO21.5                               | 50 points; (no maximum)   | Regional Award of Merit nominations  |
| CO21.6                               | 25 points; (no maximum)   | Chapter Service Award nominations  |
| <b>Planning:</b>                     |   |  |
| CO22                                 | 75 points; (75 points maximum)  | For a planning/goal setting session with DRC resulting in written measurable objectives by October 1   |
| CO23                                 | 500 points for establishing or 300 points for updating annually; (500 points maximum) | For establishing and updating annually a chapter long term strategic plan (minimum of 3 years) with goals for chapter growth, leadership, and financial stability. Plan to be submitted to DRC for approval not later than January 1   |
| CO24                                 | 10 – 50 points; (50 points maximum)   | For achieving goals established in planning session  |
| <b>Chapter Finances:</b>             |   |  |
| CO25                                 | 200 points; (200 points maximum)  | For ensuring an objective annual audit of the previous year's chapter accounts and funds by the Auditing Committee or CPA firm, with the results being reported to the BOG and DRC no later than July 30 (Points should be entered for audit and reporting of the previous year's finances.)   |
| CO26                                 | 50 points; (50 points maximum)  | For the BOG approving an annual budget no later than September 15  |
| CO27                                 | 10 points; (120 points maximum)   | For each month the BOG approves a monthly report from the Treasurer within 30 days of reported month end. (Refer to the Manual for Chapter Operations for report requirements.)  |
| CO28                                 | 25 points; (25 points maximum)  | For filing any required tax forms by the deadline (November 15 for US Chapters)  |
| CO29                                 | 25 points; (25 points maximum)  | For the BOG appointment of Auditing Committee, no later than April 15 (BOG members are not eligible to serve on Auditing Committee)  |
| CO30                                 | 25 points; (25 points maximum)  | For on-time payment of region dues   |
| CO31                                 | 10 points; (120 points maximum)   | For collecting and archiving monthly digital financial statements from all chapter accounts  |

## 2021-22 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

|   |                                      |  |
|---|--------------------------------------|--|
| CO32  | 50 points; (50 points maximum)       | For the Chapter Treasurer attending the Treasurer or Chapter Operations' Workshop at CRC   |
| <b>DRC Assigns/Enters the following points:</b> |                                      |  |
| CO33  | 50 points each; (200 points maximum) | For each chapter officer who attends the CRC besides the Delegate and Alternate (Chapter Officers are defined as BOG, e.g. president, president-elect, treasurer, secretary, etc.)               |
| CO34  | 50 points; (50 points maximum)       | For President-Elect attendance at President-Elect Training in Regional Planning Meeting and CRC workshop session   |
| CO35  | 100 points; (300 points maximum)     | For each chapter member attending the Chapter Leadership Academy   |
| CO36  | 25 points; (25 points maximum)       | For the chapter nominating committee report (with all chapter officers & committee chair positions filled) distributed by the April 30 chapter meeting <i>(Points assigned by DRC by May 15)</i> |
| CO37  | 50 points; (150 points maximum)      | For developing a chapter to chapter partnership with a chapter from a different region <i>(Chapter to submit partnership reports to DRC.)</i>  |
| CO38  | 50 points; (200 points maximum)      | For participation of RVC, Society ExCom, Society BOG, Society Committee Chair (or any Society level position) in local chapter meetings for brief presentation/Q&A session                       |

## 2021-22 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

### CHAPTER TECHNOLOGY TRANSFER CATEGORY

**MINIMUM: 550 POINTS**

**PAR: 1050 POINTS**

**Presidential Initiatives:**

|     |                                  |   |
|-----|----------------------------------|---|
| CT1 | 50 points; (500 points maximum)  | For each Chapter Program topic based on alignment with the current <b>Presidential Initiatives Master List</b>  |
| CT2 | 100 points; (no maximum)         | For each Technical Tour and accompanying 30-minute presentation based on alignment with the current <b>Presidential Initiatives Master List</b>   |
| CT3 | 10 points; (500 points maximum)  | For each Professional Development Hour (PDH) earned (at a Chapter Program) by a chapter member based on alignment with the current <b>Presidential Initiatives Masters List</b>   |
| CT4 | 100 points; (300 points maximum) | For each Conference Paper or Technical Paper authored or co-authored by a chapter member based on alignment with the current <b>Presidential Initiatives Master List</b>  |
| CT7 | 100 points; (300 points maximum) | For each ASHRAE published document (e.g. Handbook Chapter, Standard, User's Manual, Guideline, Design Guide, Periodical, Position Document) authored, co-authored, or translated by Chapter members and submitted to the cognizant group for publication. (Note: Requests to translate any ASHRAE publication must be submitted in advance to ASHRAE's Publisher/Director of Publications and Education). Content must be based on alignment with the current <b>Presidential Initiatives Master List</b> . |
| CT8 | 10 points; (50 points maximum)   | For each informational presentation at a chapter meeting on the certification program (BEMP, CHD, HFDP, HBDP, BCxP, BEAP, OPMP)   |

**Efficient use of volunteers' time:**

|      |                                 |  |
|------|---------------------------------|--|
| CT9  | 100 points (100 points maximum) | For a Chapter Technology Transfer Committee with a minimum of a chair and a co-chair |
| CT10 | 100 points (100 points maximum) | If CTT committee includes a refrigeration subcommittee chair                         |

**Planning and Administrative Activities:**

|      |                                 |   |
|------|---------------------------------|---|
| CT11 | 50 points; (50 points maximum)  | For completing and publishing DL (Distinguished Lecturer) meeting schedule and speakers by October 1 or 2 weeks after the CRC, whichever is later |
| CT12 | 50 points; (250 points maximum) | For submitting summary of speaker reviews to CTTC RVC for use in regional speaker database (50 points per each speaker)                           |
| CT13 | 50 points; (no maximum)         | For submitting DL event summary critique form within 15 days of DL visit (50 points per each DL event)  |

**Awards and Submission Activities:**

|      |                          |  |
|------|--------------------------|--|
| CT14 | 300 points; (no maximum) | For each Technology Award entry at Regional level  |
| CT15 | 500 points (no maximum)  | For each CTTC Award entry at Society level (including Technology Award, Milton Garland Commemorative Refrigeration Award for Project Excellence, Comfort Cooling Award for Project Excellence entry, Donald A. Siller Refrigeration Award, Dan Mills Chapter Programs Award) |

**Meetings, Presentations or Events:**

|      |                                  |  |
|------|----------------------------------|--|
| CT16 | 100 points; (600 points maximum) | For each 1-hour PDH seminar or webcast presentation (live or delayed) sponsored/hosted by the chapter  |
| CT17 | 100 points; (600 points maximum) | For each chapter meeting presenting one of the recorded Tech-Hour programs (available on ASHRAE 365)   |
| CT18 | 100 points; (no maximum)         | For each joint meeting with HVAC&R peer societies, organizations, and/or associations  |
| CT19 | 100 points; (no maximum)         | For each ASHRAE certification earned, or renewed by a chapter member during the current fiscal year  |
| CT20 | 50 points; (no maximum)          | For each chapter seminar/program by a DL with multi-chapter in person visits and/or virtual visits   |
| CT21 | 100 points; (600 points maximum) | For each chapter member who is currently serving on any of the following ASHRAE committees/groups: TC, TRG, MTG, *RP, SPC, SSPC, GPS or SGPC (VM or NVM) (*RP = Research Project)  |
| CT22 | 50 points; (100 points maximum)  | For each chapter member who is currently serving on an ASHRAE TC, TRG, MTG, *RP, SPC, SSPC, GPS or SGPC (VM or NVM) (*RP = Research Project) giving a presentation at their local chapter meeting that explains the function of technical committees (handbook chapters, standards, research, etc.) using a presentation template developed by TAC and posted at <a href="http://www.ashrae.org/tcs">www.ashrae.org/tcs</a> under heading "General TC Information" |
| CT23 | 50 points; (no maximum)          | For each chapter monthly meeting held where continuing education credits (e.g. PDHs, CEUs) are provided for attendees  |

### 2021-22 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

|   |                                  |  |
|---|----------------------------------|--|
| CT24  | 100 points; (300 points maximum) | For hosting an "ASHRAE Technical Committee (TC) Members" chapter meeting in which TC attendees will be presented                       |
| <b>RVC Assigns/Enters the following points:</b> |                                  |  |
| CT23  | 200 points; (200 points maximum) | For the Chapter CTT committee chair or co-chair attending the CTTC workshop at CRC   |
| CT24  | 100 points; (200 points maximum) | For planning/goal setting session with RVC ( <i>points assigned by RVC by October 1 or 2 weeks after the CRC, whichever is later</i> ) |
| CT25  | 100 points; (100 points maximum) | For achieving goals established in goal-setting session with RVC ( <i>points assigned by RVC by June 30</i> )                          |



## 2021-22 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

### COMMUNICATIONS CATEGORY

**MINIMUM: 300 POINTS**

**PAR: 700 POINTS**

**Presidential Initiatives:**

|     |                                |   |
|-----|--------------------------------|---|
| CC1 | 25 points; (25 points maximum) | For posting a narrative and link for the current ASHRAE Society Theme on the chapter website  |
| CC2 | 5 points; (100 points maximum) | For each chapter social media posting, with photo, supporting the current ASHRAE Society Theme  |
| CC3 | 50 points; (no maximum)        | For each chapter member who is interviewed on a broadcast media regarding ASHRAE  |
| CC4 | 50 points; (no maximum)        | For each podcast of at least 10 minutes with a chapter member who is 50 years or older  |
| CC5 | 50 points each; (no maximum)   | For each presentation/podcast/panel discussion between two individuals, one involved in grassroots and the other technical, sharing why people should be involved in both aspects of ASHRAE |

**Efficient use of volunteers' time:**

|        |   |   |
|--------|---|---|
|        |   | <b>WEBSITE:</b>   |
| CC6.1  | 50 points; (50 points maximum)            | For updating the chapter website with current officer information by October 1  |
| CC6.2  | 50 points; (50 points maximum)            | For updating the chapter website with chapter program schedule for the year by October 1  |
| CC6.3  | 50 points; (50 points maximum)            | For listing a contact email address on the chapter's website in an obvious location, such as the footer or a Contact page                                       |
| CC6.4  | 20 points; (200 points maximum)           | For each month that updated information, news, or images are posted to the chapter's homepage. Excludes posting the chapter newsletter or social media widgets  |
| CC6.5  | 10 points; (100 points maximum)           | For posting a monthly newsletter to the website within 15 days of publishing  |
| CC6.6  | 10 points; (50 points maximum)            | For promotion of Society events, certifications, or products on the chapter website using the materials available in Marketing Central at ASHRAE.org            |
|        |   | <b>SOCIAL MEDIA:</b>  |
| CC7.1  | 50 points; (50 points maximum)            | For a chapter social media channel with more than 100 followers   |
| CC7.2  | 20 points; (200 points maximum)           | For each month there is at least one post featuring an event photo from the last 30 days (20 points per month)  |
| CC7.3  | 10 points; (100 points maximum)           | For public posts that tag or mention Society accounts in the post message   |
| CC7.4  | 10 points per post; (50 points maximum)   | For public post that uses the hashtag #myashrae   |
| CC7.5  | 25 points; (no maximum)                   | For each social media post where a member illustrates how certification has helped their career   |
| CC7.6  | 10 points; (100 points maximum)           | For each post on chapter's social media forum by a chapter member who is 50 years or older  |
|        |   | <b>COLLABORATION TOOLS:</b>   |
| CC8.1  | 100 points; (100 points maximum)          | For using Society-provided Basecamp tool for chapter leadership business in place of other digital collaboration tools (email, GoogleDrive, Box, DropBox, etc.) |
| CC8.2  | 20 points; (100 points maximum)           | For adding every month the chapter meeting agenda to Basecamp   |
|        |   | <b>EMAIL DISTRIBUTION:</b>  |
| CC9.1  | 20 points per month; (200 points maximum) | For distributing a chapter newsletter via email on a monthly basis  |
| CC9.2  | 10 points; (200 points maximum)           | For distributing an announcement that prominently features an upcoming event that is distributed via email at least 2 weeks prior to the event                  |
| CC9.3  | 25 points; (100 points maximum)           | For promotion of Society events, certifications, or products in chapter emails or newsletters using the materials available in Marketing Central at ASHRAE.org  |
|        |   | <b>KNOWLEDGE TRANSFER:</b>  |
| CC10.1 | 100 points; (100 points maximum)          | For creating or updating a procedural document for chapter communications, such as instructions on updating the chapter website and sharing with RCC            |
| CC10.2 | 100 points; (100 points maximum)          | For holding a transition meeting with the incoming chapter Communications Chair by June 1 <sup>st</sup>   |
| CC11   | 50 points; (50 points maximum)            | <b>VIRTUAL:</b><br>For offering a hybrid option to the chapter members to attend the chapter meetings virtually   |

**RCC Assigns/Enters the following points:**

|      |                                  |  |
|------|----------------------------------|--|
| CC12 | 100 points; (100 points maximum) | For Chapter Communications Chair who attends the CRC Communications workshop |
|------|----------------------------------|--|

### 2021-22 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

|      |                                  |   |
|------|----------------------------------|---|
| CC13 | 100 points; (150 points maximum) | For planning/goal setting session with RCC by October 1 or 2 weeks after the CRC, whichever is later (50 point bonus if planning/ goal setting session takes place during CRC)  |
| CC14 | 100 points; (100 points maximum) | For achieving goals established in goal-setting session with RCC  |
| CC15 | 50 points; (50 points maximum)   | For listing Disclaimer on homepage as specifically listed in the current ASHRAE Web Policy document with <a href="http://www.ashrae.org">www.ashrae.org</a> address linked to the Society homepage. The disclaimer is as follows: This web site is maintained by the (name of Chapter, Section or Student Branch) of ASHRAE. It does not present official positions of the Society nor reflect Society policy. ASHRAE chapters may not act for the Society and the information presented here has not had Society review. To learn more about ASHRAE activities on an international level, contact the ASHRAE home page at <a href="http://www.ashrae.org">http://www.ashrae.org</a> .” |

## 2021-22 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

### GOVERNMENT AFFAIRS CATEGORY

|   |   |  |
|---|---|--|
| <b>MINIMUM: 500 POINTS</b>                      |   | <b>PAR: 1000 POINTS</b>  |
| <b>Presidential Initiatives:</b>                |   |  |
| GA1   | 50 points; (500 points maximum)                             | For each unique industry topic discussed with a government individual, department, or agency (elected official, policy decision maker or senior staff level) based on alignment with the current <b>Presidential Initiatives Master List</b>   |
| <b>Efficient use of volunteers' time:</b>       |   |  |
| GA2   | 50 points; (150 points maximum)                             | For establishing and maintaining a chapter Government Affairs Committee with at least 2 members to promote ASHRAE with state, provincial, and local government (50 bonus points if GAC committee includes a government employee; 100 bonus points if the GAC chair is a government employee)   |
| GA3   | 50 points; (minimum 1 hour of training; 100 points maximum) | For government affairs training for chapter officers and future leaders (50 bonus points if the training includes a speaker/presenter who is a government official)  |
| GA4   | 50 points; (50 points maximum)                              | For CTTC chair serving on the GAC committee in an effort to promote GAC topics for chapter meeting presentations   |
| <b>Awards and Submission Activities:</b>        |   |  |
| GA5   | 100 points; (300 points maximum)                            | For each Chapter Government Affairs Award entry into Society or Regional competition ( <i>each Award entry counted only once</i> )   |
| GA6   | 50 points; (250 points maximum)                             | For each article on a government affairs activities-related (e.g., state provincial, or local legislative or regulatory issue) published in a chapter newsletter or posted on a chapter website with copy sent to RVC ( <i>maximum of two articles per month</i> )   |
| <b>Meetings, Presentations or Events:</b>       |   |  |
| GA7   | 100 points; (200 points maximum)                            | For each joint chapter meeting with local, state, or provincial government entity to discuss a built environment or HVAC&R industry-related topic (Must show RVC confirmation of joint planning with the other entity to promote the meeting)  |
| GA8   | 100 points; (200 points maximum)                            | For each action or activity that commemorates or promotes National Engineers' Week or non-US equivalent activity that promotes Engineering, World Refrigeration Day, World Standards Day or other national/global events   |
| GA9   | 50 points; (200 points maximum)                             | For promotion of ASHRAE certification programs through personal presentations or newsletters with government officials and agencies  |
| GA10  | 50 points; (200 points maximum)                             | For each Chapter program on the topic of government activities ( <i>minimum 45 minute presentation; maximum 2</i> )  |
| GA11  | 100 points; (400 points maximum)                            | For each occurrence of an ASHRAE chapter member presenting or giving testimony to a public meeting or hearing on a subject where ASHRAE's resources and standards are being used in the discussion of the subject matter   |
| GA12  | 200 points; (600 points maximum)                            | For each piece of legislation that ASHRAE chapter members are able to get sponsored at the local or state level. The legislation should be in line with ASHRAE PPP's for current SY, PPIB's and PD's. Legislation does not have to pass for points to be counted, but summary report must be sent to RVC before claiming points  |
| <b>RVC Assigns/Enters the following points:</b> |   |  |
| GA13  | 50-150 points; (150 points maximum)                         | For the incoming Chapter GAC committee chair attending the GAC CRC workshop ( <i>50 points for chapter representative other than the chair who is a senior officer or member of GAC</i> )  |
| GA14  | 50-100 points; (no points maximum)                          | For each documented personal contact (meeting) by a chapter member with government officials (at any level of government relevant to buildings, engineering or construction, sustainability including building officials, school boards and universities school system facility staff, state energy code officials, tribal government entities etc.) with the goal of promoting ASHRAE related subjects or Chapter goals and objectives, with notification and submit a record via the online portal sent to the ASHRAE Government Affairs Office (Points will only be given once a report is submitted to the ASHRAE Government Affairs Office. Points will be assigned by the RVC, once the report is submitted to the Government Affairs Office.) |
| GA15  | 100 points; (200 points maximum)                            | For chapter submitting report(s) with local issues identified to RVC ( <i>with a cap of 200 points in one year</i> )   |
| GA16  | 50-100 points; (100 points maximum)                         | For planning/goal setting session with RVC ( <i>points assigned by RVC by October 1 or 2 weeks after the CRC, whichever is later</i> )   |
| GA17  | 10 –300 points; (300 points maximum)                        | For achieving goals established in goal-setting session with RVC ( <i>points assigned by RVC by June 30</i> )  |

## 2021-22 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

### HISTORICAL CATEGORY

**MINIMUM: 100 POINTS**

**PAR: 300 POINTS**

**Note:** Histories about a system, standard, person, event or a company, outside the geographic area of the chapter are not acceptable for PAOE points unless a credible connection may be established by the Chapter Historian and approved by the Regional Historian. Histories for the Gold Ribbon Award shall be written by the Chapter Historian from information obtained by interviewing a person knowledgeable of the history being written or from personal knowledge of the history of the system, standard, person, event or company; or from detailed research as outlined in the document "The How To Guide for Researching." All sources must be cited and referenced in a Bibliography attached at the end of the submittal document. Information obtained solely from electronic material or sources is not acceptable.

**Points Related to Chapter Historical Activities:**

|    |   |   |
|----|---|---|
| H1 | 150 points; (150 points maximum)                          | For digitizing complete chapter historical archives posting on the chapter website and/or electronic storage and updating annually; (include a minimum of meeting minutes, monthly newsletters, listing of chapter executive inventory of historic items and memorabilia not scan-able and CRC reports)                                       |
| H2 | 200 points; (200 points maximum)                          | For each history of a chapter, updates of the chapter history (5 years for a Chapter History), and history of a system, standard, person, event or a company significant to the Chapter's history (Society Gold Ribbon Award). (Note: A Chapter history must be completed before other histories can be submitted for the Gold Ribbon Award.) |
| H3 | 50 points; (50 points maximum)                            | For chapter historical display at CRC (updated annually or new display)   |
| H4 | 50 points; (50 points maximum)                            | For creating a chapter timeline with annual updates adding previous year events and posting on the chapter website and/or electronic storage  |
| H5 | 50 points; (50 points maximum)                            | For program on history as all or part of a monthly chapter meeting  |
| H6 | 100 points; (no maximum)                                  | For each interview with Fellow ASHRAE member  |
| H7 | 50 points; (50 points per individual; 300 points maximum) | For inviting Life members to one of the monthly chapter meetings  |
| H8 | 25 points; (200 points maximum)                           | For publishing articles on chapter, company or member history in chapter newsletter, Society publication, chapter social media or chapter website with a maximum of 8 articles  |

**Regional Historian Assigns/Enters the following points:**

|      |                                       |  |
|------|---------------------------------------|--|
| H9.1 | 100 points; (100 points maximum)      | <b>FOR THE INCOMING CHAPTER HISTORIAN:</b><br>For attendance at the CRC Workshop   |
| H9.2 | 50 points; (50 points maximum)        | For completing the ASHRAE History Workshop Template between the start of the CRC and the start of the new ASHRAE Society year on July 1  |
| H10  | 100 points; (100 points maximum)      | For chapter historian participating in new historical based activities unique to the Region or Society; chapter needs to have Regional Historian's prior approval for this activity to qualify   |
| H11  | 100 points; (no maximum)              | For each leadership recall interview, copy must be submitted to RVC by June 30   |
| H12  | 50 – 100 points; (100 points maximum) | For planning/goal setting session with Regional Historian, including the preparation and submission of the respective Chapter's Historical MBOs ( <i>points assigned by Regional Historian by October 1 or 2 weeks after the CRC, whichever is later</i> ) |
| H13  | 10 – 100 points; (100 points maximum) | For achieving goals established in goal-setting session with Regional Historian ( <i>points assigned by Regional Historian by June 30</i> )  |

## 2021-22 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

| MEMBERSHIP PROMOTION CATEGORY   |   |   |
|---|---|---|
| <b>MINIMUM: 1000 POINTS</b>   |   | <b>PAR: 1600 POINTS</b>   |
| *All end of the year reports are run on July 2 <sup>nd</sup> or the next business day for the June 30 results |   |   |
| <b>Efficient use of volunteers' time:</b>   |   |   |
| MP1   | 25 points per month; (300 points maximum) | If Society membership delinquencies in chapter are 5% or less of total Chapter Area Assigned Members at the end of each month   |
| MP2   | 100 points; (300 points maximum)          | For Membership Promotion event at chapter meeting for specific organized MP event (e.g., member bring a member, recruitment/retention calling campaigns, presentations to promote membership outside of chapter meetings) |
| MP3   | 25 points; (50 points maximum)            | For each separate social event  |
| MP4   | 25 points; (300 points maximum)           | For retention of each new member ( <i>dues paid second and third year</i> )   |
| MP5   | 50 points per member; (no maximum)        | For each member who rejoins or is reinstated after being cancelled for more than one year   |
| MP6   | 5 points; (50 points maximum)             | For recognition of new members and advancements at each chapter meeting   |
| MP7   | 10 points; (150 points maximum per year)  | For each non-member invited and who attends a chapter meeting (10 points for each individual)   |
| MP8   | 50 points; (50 points maximum)            | If MP chapter committee chair and chapter officers are comprised of individuals that report 3 or more different industry classifications  |
| <b>RVC Assigns/Enters the following points:</b>   |   |   |
| MP9   | 50 points; (no maximum points)            | 50 points per 0.5% growth in membership at the end of fiscal year above starting point  |
| MP10  | 100 points; (100 points maximum)          | For the incoming Chapter Membership Promotion committee chair or co-chair attending the MP CRC workshop   |
| MP11  | 100 points; (100 points maximum)          | For the incoming Chapter Membership Promotion committee chair or co-chair attending the MP centralized training   |
| MP12  | 50 points; (100 points maximum)           | If Chair or Co-Chair have been on the committee for 2 years or more   |
| MP13  | 50-100 points; (100 points maximum)       | For planning and goal setting session with RVC and chapter MP committee members   |
| MP14  | 10 – 100 points; (100 points maximum)     | For achieving goals established in goal-setting session with RVC ( <i>points assigned by RVC by June 30</i> )   |
| MP15  | 25 points; (100 points maximum)           | If Membership Promotion Committee size is 5 or 3% of chapter members ( <i>whichever is less as of June 30*</i> ) with dedicated committee members serving as the Recruitment Chair, and/or Retention Chair                |

## 2021-22 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

| <b>RP CATEGORY (STAFF ASSIGNS POINTS)</b>  |   |  |
|--|---|--|
| <b>MINIMUM: 800 POINTS</b>   |   | <b>PAR: 1050 POINTS</b>  |
| <b>Efficient use of volunteers' time:</b>  |   |  |
| <b>GOAL:</b> Contributions considered towards a chapter <i>Goal</i> include gifts to ASHRAE, YEA ASHRAE Learning Institute, ASHRAE Research, and Scholarships held by the ASHRAE Foundation. |   |  |
| <b>EXCEPTIONS:</b> Foundation gifts made as part of routine ongoing Foundation Solicitations.  |   |  |
| A chapter's <i>Goal</i> shall be set by each Region's DRC.   |   |  |
| <b>Option 1:</b>   |   |  |
| RP1  | 10 points; (1000 points maximum)            | Earned by a chapter for each 1% of <i>Goal</i> attained – (100% of <i>Goal</i> ) <b>OR</b>   |
| <b>Option 2:</b>   |   |  |
| RP2  | 10 points                                   | Earned for each dollar per area assigned member attained   |
| RP3  | 20 additional points; (3000 points maximum) | For each dollar per area assigned member collected above the Society dollar per member Goal of <b>\$75</b>   |
| RP4  | 15 points; (15 points maximum)              | For Volunteer Committee Worksheet completed by <i>October 15</i> and sent to RVC and Staff. A minimum of 3 additional chapter members should comprise the RP Volunteer Committee   |
| RP5  | 25 points; (25 points maximum)              | For formal recognition of all Honor Roll level contributors from the prior year's campaign before December 31 ( <i>Note: Recognition items must be ordered from headquarters by September 1 to qualify</i> )             |
| RP6  | 100 points; (100 points maximum)            | For Chapter Full Circle Award ( <i>by November 15</i> )  |
| RP7  | 10 points                                   | Per Chapter BOG member who contributes at the Full Circle level <i>by November 15</i> , helping the Chapter achieve "Full Circle Plus." These points are only given if the Chapter completes the Chapter Full Circle.    |
| RP8  | 100 points; (200 points maximum)            | 100 points for meeting or exceeding 30% of Goal <i>by December 1</i> ; 100 points for meeting or exceeding 60% of Goal <i>by March 31</i>  |
| RP9  | 25 points; (50 points maximum)              | For the RP promotional chapter meeting held <i>after December 31</i> ( <i>Note: 25 points for RP promotion and 25 points for promotion of Research/RAC</i> )   |
| RP10   | 100 points; (100 points maximum)            | For workshop attendance by current RP chair or RP co-chair (as listed on chapter roster) at an RP Committee approved RP training workshop  |
| RP11   | 100 points; (100 points maximum)            | For attendance by the current RP Chair or RP co-chair (as listed on chapter roster) at the CRCs minimum 2 hour RP workshop if Centralized Training is also attended  |
| RP12   | 50 points; (50 points maximum)              | For meeting or exceeding scholarship goal ( <i>by March 31</i> )   |
| RP13   | 100 points (100 points maximum)             | For a succession plan for RP chair submitted to RP Staff and RVC by April 1  |
| RP14   | 500 points; (500 points maximum)            | For chapters who have reached goal (based on receipts at headquarters) <i>by June 15</i>   |
| RP15   | 300 points; (300 points maximum)            | For reaching Challenge Goal (105% of <i>High Five</i> or 120% Goal)  |
| RP16   | 250 points                                  | For each new Golden Circle level or higher investment acquired and credited to the chapter (as determined by the RVC & RP ExCom guidelines).   |
| RP17   | 200 points; (200 points maximum)            | Apex Award   |
| RP18   | 150 points                                  | For each renewed Golden Circle or higher investment acquired and credited to the chapter (as determined by the RVC & RP ExCom guidelines)  |
| RP19   | 100 points                                  | For new <i>High Five</i> level of contributions  |
| RP20   | 50 points (no maximum)                      | Per Special Event held by a Chapter where over 75% of profits are donated to the RP Campaign. ( <i>To qualify as a Special Event profits must meet or exceed \$500 for in-person events; \$100 for virtual events.</i> ) |
| RP21   | 50 points (no maximum)                      | For each endowed contribution (\$1,000 minimum)  |
| RP22   | 10 points (no maximum)                      | Per \$ per/member for chapters who meet or exceed \$50 per/member and reach or exceed Goal   |

## 2021-22 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

### STUDENT ACTIVITIES CATEGORY

|   |                                     |  |
|---|-------------------------------------|--|
| <b>MINIMUM: 500 POINTS</b>                      |                                     | <b>PAR: 800 POINTS</b>   |
| <b>Presidential Initiatives:</b>                |                                     |  |
| SA1   | 10 points; (500 points maximum)     | For each student attending a Chapter Program or Technical Tour where the topic aligns with the current <b>Presidential Initiatives Master List</b>   |
| SA2   | 100 points; (500 points maximum)    | For each Chapter Program presented by a student member at a Chapter Meeting based on alignment with the current <b>Presidential Initiatives Master List</b>  |
| <b>K-12/STEM Activities</b>                     |                                     |  |
| SA3   | 50 points; (add any bonus points)   | For each K-12/STEM Activity. Then, add any bonus points  |
| SA3.1   | 25 bonus points                     | If the activity is held jointly with another organization (i.e. Boy Scouts, Girl Scouts, NAWIC, AIA, ACE Mentorship, etc.)   |
| SA3.2   | 25 bonus points                     | If the activity is promoting diversity, equity, and inclusion in engineering   |
| SA3.3   | 25 bonus points                     | For each National Engineers' Week activity or equivalent non-US activity   |
| SA3.4   | 25 bonus points                     | If all chapter officers + K-12 STEM Champion (or SA chair) participate (this qualifies for the <a href="#">K-12/STEM leadership award</a> )  |
| <b>Post-High Activities</b>                     |                                     |  |
| SA4.1   | 50 points; (50 points maximum)      | <b>STUDENT MEMBERSHIP:</b><br>If net student membership as of April 1 for the chapter exceeds that of previous year  |
| SA4.2   | 50 points; (no maximum)             | For each current student member that renews their ASHRAE student membership  |
| SA4.3   | 50 points; (no maximum)             | For each student member that transfers from student member to Associate member via <a href="#">SmartStart</a>  |
| SA4.4   | 50 points; (50 points maximum)      | For tracking student members permanent contact information (cell phone, personal email, LinkedIn, etc.)  |
| SA4.5   | 50 points; (300 points maximum)     | <b>GENERAL STUDENT ACTIVITIES:</b><br>For each ASHRAE Student Design Competition entered   |
| SA4.6   | 50 points; (no maximum)             | For each National Engineers' Week activity or equivalent non-US activity   |
| SA4.7   | 25 points; (25 points maximum)      | For promoting Society or Regional level scholarships to Student Branch Advisors and/or students through e-mail or social media   |
| SA4.8   | 50 points; (150 points maximum)     | For each student that submits an application for a <a href="#">Society</a> level scholarship   |
| SA4.9   | 25 points; (no maximum)             | For each student member attending the Winter Conference Student Program  |
| SA4.10  | 10 points; (100 points maximum)     | For each student member that attends a local chapter meeting   |
| SA4.11  | 5 points; (50 points maximum)       | For each student member that attends a regional ASHRAE meeting or CRC  |
| SA4.12  | 100 points; (no maximum)            | For establishing a new student branch or reactivating an inactive student branch   |
| SA4.13  | 25 points; (no maximum)             | <b>CHAPTER MEMBER ENGAGEMENT IN STUDENT ACTIVITIES:</b><br>For each post high school activity in which one or more chapter member participates   |
| SA4.14  | 25 bonus points                     | If the activity is promoting diversity, equity, and inclusion in engineering   |
| SA4.15  | 20 points; (40 points maximum)      | For each meeting between a chapter member and a faculty of engineering college or tech school for the purpose of establishing a student branch   |
| SA4.16  | 25 points; (50 points maximum)      | For each chapter activity with student branch (e.g. Student Night meetings, technical programs, technical tours)   |
| SA4.17  | 25 points; (25 points maximum)      | For any chapter member mentoring a team (e.g. ASHRAE Grant or Design Competition) excluding Student Branch Advisors.   |
| SA4.18  | 25 points; (200 points maximum)     | For each ASHRAE Student member, enrolled in engineering college, undergraduate or tech school, that is placed in an ASHRAE related summer intern job or part-time job during school semester by an ASHRAE member |
| <b>RVC Assigns/Enters the following points:</b> |                                     |  |
| SA19.1  | 100 points; (100 points maximum)    | <b>TRAINING:</b><br>For the incoming Chapter Student Activities committee chair attending the SA Centralized Training  |
| SA19.2  | 100 points; (100 points maximum)    | For the incoming Chapter Student Activities committee chair attending the SA CRC workshop  |
| SA20  | 50-100 points; (100 points maximum) | For planning/goal setting session with RVC ( <i>points assigned by RVC by October 1 or 2 weeks after the CRC, whichever is later</i> )   |
| SA21  | 10-100 points; (100 points maximum) | For achieving goals established in goal-setting session with RVC ( <i>points assigned by RVC by June 30</i> )  |

**2021-22 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)**

|        |                         |  |
|--------|-------------------------|--|
| SA22.1 | 25 points; (no maximum) | <b>AWARDS:</b><br>For each Student Activities Achievement Award nomination (due December 31 <sup>st</sup> each year) |
| SA22.2 | 25 points; (no maximum) | For each Student Branch Advisor of the Year Award nomination (due June 10 <sup>th</sup> each year)                   |
| SA22.3 | 25 points; (no maximum) | For each Youth Outreach Award nomination (due December 31 <sup>st</sup> each year)                                   |



## 2021-22 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

### YOUNG ENGINEERS IN ASHRAE (YEA) CATEGORY

**MINIMUM: 300 POINTS**

**PAR: 800 POINTS**

**Presidential Initiatives:**

|      |                                  |   |
|------|----------------------------------|---|
| YEA1 | 100 points; (500 points maximum) | For each Chapter Program presented by a YEA member at a Chapter Meeting based on alignment with the current <b>Presidential Initiatives Master List</b> |
|------|----------------------------------|---|

**Membership:**

|      |                                 |   |
|------|---------------------------------|---|
| YEA2 | 25 points; (200 points maximum) | For each new member who qualifies as YEA (who were not student transfers) |
| YEA3 | 25 points (200 points maximum)  | For any YEA member involved with a Membership Promotion program or event  |
| YEA4 | 100 points; (100 maximum)       | For increasing YEA membership over the Society year by 5%                 |

**Technical Committees:**

|      |                          |   |
|------|--------------------------|---|
| YEA5 | 25 points; (no maximum)  | For each YEA member who is a provisional corresponding member or corresponding member of an ASHRAE TC (points per YEA member, not per committee)  |
| YEA6 | 200 points; (no maximum) | For each YEA member who is a voting member of an ASHRAE TC, TRG, MTG, *RP, SPC, SSPC, GPS or SGPC (VM or NVM) (*RP = Research Project) (Participation can be verified from the ASHRAE Committee Participation by Region Report which can be provided by each DRC. Points per YEA member, not per committee) |
| YEA7 | 50 points; (no maximum)  | For each YEA member who did a Technical presentation at a CRC, Winter, Annual or Topical Conference   |

**Historical Activities:**

|      |                               |   |
|------|-------------------------------|---|
| YEA8 | 25 points (50 points maximum) | For a local Chapter Historical activity performed by a YEA member |
|------|-------------------------------|---|

**YEA Program Attendance:**

|       |  |   |
|-------|--|---|
| YEA9  | 300 points; (600 points maximum)       | For each YEA member who attends YEA Leadership Weekend, YEA Leadership International, YEA Leadership 2.0, Leadership U or LeaDRS program during the Society year  |
| YEA10 | 50 points for nomination; (no maximum) | Applying for the YEA scholarship for the HVAC Design course <a href="https://www.ashrae.org/communities/young-engineers-in-ashrae-yea/yea-events-and-programs/yea-scholarship-for-hvac-design-essentials-training">https://www.ashrae.org/communities/young-engineers-in-ashrae-yea/yea-events-and-programs/yea-scholarship-for-hvac-design-essentials-training</a> |
| YEA11 | 50 points; (150 points maximum)        | YEA member attendance at HVAC Design course attendance (including applying for the YEA scholarship for the class)   |

**Awards and Submission Activities:**

|       |                                 |   |
|-------|---------------------------------|---|
| YEA12 | 50 points; (200 points maximum) | For each nomination for any Society-level YEA Award: Developing Leader, Award of Individual Excellence – Professional Development, Award of Individual Excellence – Personal Development, Award of Individual Excellence – Outreach |
|-------|---------------------------------|---|

**Meetings, Presentations or Events:**

|       |                                 |   |
|-------|---------------------------------|---|
| YEA13 | 25 points; (100 points maximum) | For each YEA event at chapter meeting or separate organized YEA event   |
| YEA14 | 25 points; (100 points maximum) | For each YEA activity outside of a chapter meeting that also includes a technical component, i.e., presentation, panel discussion, technical tour, etc. |
| YEA15 | 25 points; (100 points maximum) | YCC presents on YEA programs similar to CRC workshop presentation at chapter event  |
| YEA16 | 100 points (100 points maximum) | YEA hosted work placement or job fair to increase student retention   |
| YEA17 | 25 points                       | For attending a YEA Webinar sponsored by the Society's YEA Committee  |

**Chapter Operations and Activities:**

|       |                                  |   |
|-------|----------------------------------|---|
| YEA18 | 100 points; (300 points maximum) | For each chapter officer or board of governors member who is a YEA member (BOG position must appear on CIQ) |
| YEA19 | 75 points; (225 points maximum)  | For each YEA member assigned to a Chair position  |
| YEA20 | 50 points; (150 points maximum)  | For each YEA member assigned to a committee position to provide YEA ideas and participation                 |

**Student Activities:**

|       |                                |  |
|-------|--------------------------------|--|
| YEA21 | 25 points (200 points maximum) | For each YEA member involved with a Student Activity program or event                      |
| YEA22 | 50 points (100points maximum)  | For each presentation about the Young Engineers in ASHRAE (YEA) program to student members |

## 2021-22 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

| RVC Assigns/Enters the following points: |                                  |  |
|--|----------------------------------|--|
| YEA23                                    | 100 points; (100 points maximum) | For the incoming Chapter YEA committee chair or co-chair attending the YEA CRC workshop and participating at the CRC |
| YEA24                                    | 50 points; (50 points maximum)   | For a YEA Chapter Chair issuing a set of MBOs to YEA Regional Vice Chair   |

2020-2021

# ASHRAE REGION X CRC HISTORIAN'S WORKSHOP

CHAPTERS REGIONAL CONFERENCE

Dean S. Borges, Regional Historian, HOSTED BY: TUCSON  
CHAPTER, Tucson, Arizona



# CHAPTERS REGIONAL CONFERENCE

## Why are we here?

## Keep history alive!!

Historical Committee sponsors, encourages and conducts research into the history of heating, ventilation, air conditioning and refrigeration; encourages authorship and publication of historical articles locates, identifies and determines location for display or availability of items of historical significance; and encourages regional and chapter historians to gather historical information and artifacts. This committee reports to Publishing and Education Council.



# ASHRAE SOCIETY HISTORICAL COMMITTEE FROM (ORLANDO)

## HISTORICAL COMMITTEE Meeting

Sunday, February 2, 2020 | 8:30 a.m. – 12:00 p.m.  
Hilton Orlando, Lobby Level, Conway Lake  
2020 Winter Conference, Orlando

New Business Item 6.9, Screen shots of the relevant  
HC ASHRAE website pages

**BY: Dean S. Borges, Vice Chair**



# LINKS ASHRAE HISTORICAL COMMITTEE FROM (WINTER MEETING)

Links to the Historical Committee webpages noted previously

<https://www.ashrae.org/about/leadership/leadership-voices>

<https://www.ashrae.org/about/mission-and-vision/ashrae-industry-history/museums-dedicated-solely-to-hvacr>

<https://www.ashrae.org/about/mission-and-vision/ashrae-industry-history>

<https://www.ashrae.org/technical-resources/authoring-tools/ashrae-indexes>

<https://www.ashrae.org/File%20Library/Communities/Committees/Standing%20Committees/Historical%20Committee/Minutes-Atlanta-2019-Final.pdf>



**2020-2021**

**PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)  
HISTORICAL CRITERIA (300 PAR - 100 MIN)**



## 2020-21 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

### HISTORICAL CATEGORY

**MINIMUM: 100 POINTS**

**PAR: 300 POINTS**

**Note:** Histories about a system, standard, person, event or a company, outside the geographic area of the chapter are not acceptable for PAOE points unless a credible connection may be established by the Chapter Historian and approved by the Regional Historian. Histories for the Gold Ribbon Award shall be written by the Chapter Historian from information obtained by interviewing a person knowledgeable of the history being written or from personal knowledge of the history of the system, standard, person, event or company; or from detailed research as outlined in the document "The How To Guide for Researching." All sources must be cited and referenced in a Bibliography attached at the end of the submittal document. Information obtained solely from electronic material or sources is not acceptable.

**Presidential Initiatives:**

|    |                                 |   |
|----|---------------------------------|---|
| H1 | 50 points; (200 points maximum) | For each unique ASHRAE 125 Year Celebration promotional article published on the Chapter website                                  |
| H2 | 50 points; (400 points maximum) | For each unique ASHRAE 125 Year Celebration promotional notification, with photo/graphics, posted on Chapter social media outlets |

**Points Related to Chapter Historical Activities:**

|     |   |   |
|-----|---|---|
| H3  | 150 points; (150 points maximum)                          | For digitizing complete chapter historical archives posting on the chapter website and/or electronic storage and updating annually; (include a minimum of meeting minutes, monthly newsletters, listing of chapter executive inventory of historic items and memorabilia not scan-able and CRC reports)                                       |
| H4  | 100 points; (100 points maximum)                          | For each history of a chapter, updates of the chapter history (5 years for a Chapter History), and history of a system, standard, person, event or a company significant to the Chapter's history (Society Gold Ribbon Award). (Note: A Chapter history must be completed before other histories can be submitted for the Gold Ribbon Award.) |
| H5  | 50 points; (50 points maximum)                            | For chapter historical display at CRC (updated annually or new display)   |
| H6  | 50 points; (50 points maximum)                            | For creating a chapter timeline with annual updates adding previous year events and posting on the chapter website and/or electronic storage  |
| H7  | 50 points; (50 points maximum)                            | For program on history as all or part of a monthly chapter meeting  |
| H8  | 50 points; (no maximum)                                   | For identifying and documenting any heating, refrigeration or air-conditioning plant, systems or buildings of historic interest within the boundaries of the Chapter ASHRAE members (see criteria in note above)  |
| H9  | 50 points; (no maximum)                                   | For each interview with Fellow ASHRAE member  |
| H10 | 50 points; (50 points per individual; 300 points maximum) | For inviting Life members to one of the monthly chapter meetings  |
| H11 | 25 points; (200 points maximum)                           | For publishing articles on chapter, company or member history in chapter newsletter, Society publication or chapter website (8 newsletters)   |

**Regional Historian Assigns/Enters the following points:**

|     |                                       |   |
|-----|---------------------------------------|---|
| H12 | 150 points maximum                    | <p><b>For the incoming Chapter Historian:</b></p> <p>a) 100 points for attendance at the CRC Workshop</p> <p>b) 50 points for completing the ASHRAE History Workshop Template between the start of the CRC and the start of the new ASHRAE Society year on July 1</p> |
| H13 | 100 points; (100 points maximum)      | For chapter historian participating in new historical based activities unique to the Region or Society; chapter needs to have Regional Historian's prior approval for this activity to qualify  |
| H14 | 100 points; (no maximum)              | For each leadership recall interview, copy must be submitted to RVC by June 30  |
| H15 | 50 – 100 points; (100 points maximum) | For planning/goal setting session with Regional Historian, including the preparation and submission of the respective Chapter's Historical MBOs (points assigned by Regional Historian by October 1 or 2 weeks after the CRC, whichever is later)                     |
| H16 | 10 – 100 points; (100 points maximum) | For achieving goals established in goal-setting session with Regional Historian (points assigned by Regional Historian by June 30)  |





**HISTORY VICE CHAIR PAOE SUMMARY REPORT  
AUSTIN SUMMER VIRTUAL MEETING 2019-2020**

| Regions          | Total History PAOE | Chapters @ "0" PAOE | Chapters @ MIN | Chapters @ PAR |
|------------------|--------------------|---------------------|----------------|----------------|
| I                | 9910               | 0                   | 14             | 13             |
| II               | 6225               | 0                   | 9              | 8              |
| III              | 3115               | 4                   | 7              | 6              |
| IV               | 5050               | 1                   | 6              | 5              |
| V                | 4500               | 1                   | 11             | 7              |
| VI               | 3075               | 0                   | 11             | 5              |
| VII              | 6325               | 0                   | 12             | 10             |
| VIII             | 7725               | 2                   | 12             | 10             |
| IX               | 7592               | 0                   | 13             | 11             |
| X                | 7375               | 0                   | 14             | 10             |
| XI               | 2350               | 3                   | 8              | 2              |
| XII              | 10625              | 3                   | 16             | 14             |
| XIII             | 4320               | 0                   | 10             | 8              |
| XIV              | 100                | 8                   | 1              | 0              |
| Region- At-Large | 15500              | 8                   | 21             | 18             |
| Grand Total      | 93787              |                     |                |                |

| Top 10 in PAOE for History | Region | PAOE Pts |
|----------------------------|--------|----------|
| 1                          | RAL    | 15500    |
| 2                          | 12     | 10625    |
| 3                          | 1      | 9910     |
| 4                          | 8      | 7725     |
| 5                          | 9      | 7592     |
| 6                          | 10     | 7375     |
| 7                          | 7      | 6325     |
| 8                          | 2      | 6225     |
| 9                          | 4      | 5050     |
| 10                         | 5      | 4500     |

| Top 10 Chapters | Top 10 History PAOE |
|-----------------|---------------------|
| TRIANGLE        | 1975                |
| NEW YORK        | 1700                |
| HOUSTON         | 1550                |
| COLUMBIA        | 1500                |
| SRI LANKA       | 1450                |
| CENTRAL OK      | 1400                |
| INDIA           | 1400                |
| ROCKY MOUNTAIN  | 1400                |
| TORONTO         | 1325                |
| CAIRO           | 1300                |

1. Each Regional Historian to reach out to Chapter Historians/Presidents with ZERO PAOE History points and help them get to Minimum PAOE of 100.
2. Each Regional Historian to reach out to Chapter Historians/Presidents with less than 300 PAR PAOE points and encourage them to get PAR.



## REGION X

### 2019-2020 Presidential Award of Excellence

\*Minimum and PAR points indicated are for 2019-2020

| Chapter code | Chapter name        | Chapter AAM | Historical: Minimum 100; PAR 300 | Membership Promotion: Minimum 500; PAR 800 | Student Activities: Minimum 300; PAR 800 | RP: Minimum 800; PAR 1050 | Communications: Minimum 250; PAR 600 | Chapter Operations: Minimum 600; PAR 1200 | Chapter Technology Transfer: Minimum 550; PAR 1050 | Government Affairs : Minimum 500; PAR 650 | Young Engineers in ASHRAE: Minimum 300; PAR 800 | Chapter PAOE Point Totals |  |
|--------------|---------------------|-------------|----------------------------------|--|--|---------------------------|--------------------------------------|---|--|---|---|---------------------------|--|
| 81           | SACRAMENTO VALLEY   | 287         | 225                              | 550  | 425                                      | 610                       | 385                                  | 210                                       | 0  | 100                                       | 450   | 2955                      |  |
| 82           | GOLDEN GATE         | 898         | 375                              | 1510                                       | 3714                                     | 845                       | 375                                  | 950                                       | 0  | 0   | 1025  | 8794                      |  |
| 83           | SAN JOAQUIN         | 112         | 775                              | 785  | 380                                      | 2588                      | 260                                  | 390                                       | 1035   | 500                                       | 450   | 7163                      |  |
| 84           | SOUTHERN CALIFORNIA | 703         | 475                              | 845  | 2460                                     | 630                       | 973                                  | 1680                                      | 750  | 600                                       | 2275  | 10688                     |  |
| 85           | SAN DIEGO           | 362         | 475                              | 865  | 2005                                     | 2010                      | 1065                                 | 1235                                      | 1300   | 1650                                      | 1500  | 12105                     |  |
| 86           | CENTRAL ARIZONA     | 432         | 575                              | 1295                                       | 1745                                     | 2304                      | 1060                                 | 1010                                      | 1500   | 950                                       | 1525  | 11964                     |  |
| 87           | TJCSO               | 101         | 775                              | 775  | 875                                      | 3898                      | 990                                  | 620                                       | 750  | 950                                       | 900   | 10533                     |  |
| 92           | SOUTHERN NEVADA     | 158         | 225                              | 250  | 100                                      | 280                       | 400                                  | 40  | 0  | 0   | 300   | 1595                      |  |
| 101          | SAN JOSE            | 308         | 425                              | 1475                                       | 3391                                     | 905                       | 752                                  | 495                                       | 575  | 1600                                      | 2075  | 11693                     |  |
| 105          | ORANGE EMPIRE       | 397         | 975                              | 695  | 1360                                     | 2350                      | 825                                  | 1200                                      | 1050   | 0   | 900   | 9355                      |  |
| 108          | HAWAII              | 248         | 225                              | 530  | 890                                      | 1230                      | 425                                  | 520                                       | 1700   | 100                                       | 1825  | 7445                      |  |
| 126          | NORTHERN NEVADA     | 93          | 1275                             | 1270                                       | 230                                      | 1180                      | 475                                  | 695                                       | 900  | 100                                       | 525   | 6650                      |  |
| 144          | SERRA DELTA         | 50          | 200                              | 550  | 340                                      | 850                       | 75                                   | 130                                       | 500  | 1650                                      | 375   | 4670                      |  |
| 155          | TRI COUNTY          | 78          | 375                              | 410  | 1213                                     | 150                       | 225                                  | 10  | 175  | 0   | 350   | 2908                      |  |
| Total PAOE   |                     |             | 7375                             |  |  |                           |                                      |   |  |   |   |                           |  |
| Avg. PAOE    |                     |             | 527                              |  |  |                           |                                      |   |  |   |   |                           |  |



# PAOE HISTORICAL CRITERIA

H5. For a historical display at CRC (updated annually or new display)

50 points (50 maximum) - \$100 Reward to the winner at CRC.



# PAOE HISTORICAL CRITERIA

H14. For each leadership recall interview, copy must be submitted to Regional Historian before the next CRC.

100 points; (no maximum)



# GOLD RIBBON AWARD

For chapters and historians that accomplish certain goals to the satisfaction of the Regional Historian and DRC

Approved by the Honor and Awards Committee and Board of Directors in January 1981



# GOLD RIBBON AWARD

**GOLD RIBBON** awarded to chapter for mounting on their chapter banner

A certificate is awarded to the chapter historian

Awards made annually at the CRC



# GOLD RIBBON AWARD



Chapter historians, initially, must complete a minimum of five years of history of their chapter



Thereafter the Gold Ribbon Award can be won for each additional minimum of five-year chapter history update



Ultimate goal is eventually recording or completing the chapter's history back to its founding, as well as describing key events that led up to the formation of the chapter



# GOLD RIBBON AWARD

## 1. HISTORY OF A CHAPTER

In a narrative format, and in chronological order, for example ....

- Society and CRC events

- Chapter Charter

- Chapter events

- List of chapter officers and Fellows

- Honors and Awards

- Photographs and brief description of chapter's members co  
Society as well as HVAC&R and the community





# GOLD RIBBON AWARD

## Background to historic articles etc



Include photographs and text and graphics



Clearly identify objects and people



Material presented in historical perspective



# GOLD RIBBON AWARD

## Background to historic articles etc



Authors of ASHRAE historical presentations and articles published in ASHRAE Journal and other technical magazines and journals can be considered for Gold Ribbon award



Chapter history and historical presentations to be published on Chapter website and in newsletters



Prior to presenting historical material at CRC it can be presented at Chapter meetings



# LOU FLAGG HISTORICAL AWARD



Society President in 1988-89

The Lou Flagg Historical (Gold Ribbon) Award approved by ASHRAE Board of Directors in June 2002

“to recognize a Chapter Gold Ribbon Award winner for compiling information on outstanding historical projects or persons related to HVAC&R”

Award consists of a plaque and lapel pin



# LOU FLAGG HISTORICAL AWARD

Recognizes the vital role historians play in identifying and preserving the accomplishments of its members and the industry

Recognizes the most outstanding history on projects or persons



# LOU FLAGG HISTORICAL AWARD

Presented at the Society's Annual Conference  
.....winner receives free transportation

Recipient selected from nominations submitted to, and judged by, the Historical Committee.

Nominations submitted yearly from each Region and from Historical Committee

Nominations to be received at ASHRAE Headquarters by Dec. 1<sup>st</sup>



# CHAPTER HISTORIANS WORKSHOP



THANKS FOR  
COMING



[EMAIL: DEANBORGES@AOL.COM](mailto:DEANBORGES@AOL.COM)

775-220-5051

REGION X, HISTORIANS



**From:** [Harr, Julie](#)  
**To:** [Ratcliff, Joslyn](#)  
**Subject:** Leadership Voice interview of Steve Comstock  
**Date:** Thursday, June 3, 2021 1:51:00 PM

---

Hi Joslyn,

The Historical Committee had their meeting for the Annual Conference today and Leadership Voices interviews were discussed. They reported that an interview with Steve Comstock was recorded at ASHRAE last in-person meeting February 2020 in Orlando. They asked me to check the website to see if it had been posted and I didn't see it. Do you know if this was still in progress before Kris left ASHRAE? And if so, can we get that interview posted? The committee doesn't think if needed much editing or any really.

Please let me know whatever you find out.

Thanks,  
Julie

From: Bern Nagengast

To: ASHRAE Historical Committee

June 2, 2021

Re: Action Item 3 - Develop parameters and guidelines for content inclusion in ASHRAE's archive.

Some thoughts for discussion.

Currently ASHRAE has no guideline for selecting, acquiring, cataloging or storing Society or Industry historical material. The approach has been hit or miss. In the recent past, when historical material became available the decision on inclusion was made by the ASHRAE Librarian, Director of Publishing and Communications, members of the Historical Committee, or consensus among these three entities.

Unfortunately this has in some instances resulted in important material being missed, or even discarded (The Muffley Patent File comes to mind), so it is evident that ASHRAE needs a policy.

Despite the policy shortcoming, much significant historical material has been acquired by ASHRAE. Many ASHRAE publications have been archived. Two significant collections were added from the estate of Gershon Meckler and the Engineering Societies Library, as well as material from the Franklin Institute. For a number of years the Historical Committee funded purchases of material. ASHRAE now has one of the premier collections of HVAC&R historical material. Thus the past successful efforts should be continued under an organized policy.

Discussion of such a policy might include the areas of selection, storage, what should be digitized and format, and retention.

Selection – We can't save everything but how do we determine the importance.

Storage – historical material must be stored properly, taking into account factors such as temperature, humidity, container material.

Digitization – What material can or should be converted to electronic format to reduce the storage space needs. What should the format be? And there should be a provision to periodically review the stored formats as related to changing technology to assure that formats are changed before becoming obsolescent.

Retention – How long should historical material be retained? Most organizations recognize that recent history is necessary for operation but historical material may become less necessary and/or useful over time. Often some of that material is no longer necessary to keep.



**From:** [Niss Feiner](#)  
**To:** [Harr, Julie](#); [deanborges@aol.com](#); [smorasch@firstenergycorp.com](#); [abiyik@gazi.edu.tr](#); [Niss Feiner](#); [glennremington@live.com](#); [todorobranko@gmail.com](#); [ahmed.alaa@ashraeuae.org](#); [plantguy24@me.com](#)  
**Subject:** Niss" Report  
**Date:** Wednesday, June 2, 2021 10:46:36 PM  
**Attachments:** [image001.png](#)  
[image002.png](#)  
[image003.jpg](#)

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Good evening all,

I'd like to present my report for our meeting, but first I'd like to apologize for my absence. I was booked to teach a class this week, unbeknownst to me until Friday. Hopefully my absence does not affect our quorum.

My report is as follows:

- Comments on Bern's report for Action Item 3, I completely agree with the guidance that is required, especially with regards to what kind of containers should be used. I'm providing storage space for Toronto Chapter's archives this year in my storage container. Unfortunately it's unconditioned, and so we're looking at desiccant options to protect the documents in Rubbermaid containers.
- Action Item 4 - I haven't managed to develop an outline for the templates and procedures for documents storage yet. I will continue to work on this.
- Action Item 6 – As Bern mentioned last meeting finding people of historical significance while also would fall under Diversity in ASHRAE is challenging. While there are no shortage of Women, BIPOC, and LGBTQ+ members who have contributed greatly to science and engineering in the past, finding ones with an immediate connection to our industry and specifically our society is certainly a struggle. So my suggestion is two fold:
  - As part of our mandate to document history of ASHRAE as it happens, I suggest we propose a PAOE Presidential Initiative to award points for identifying and documenting:
    - a. persons who fall under Diversity in ASHRAE from the chapter who have won an ASHRAE Technical Award.
  - At the Toronto Chapter we have a semi-regular vignette called "On the Shoulders of Giants" where we showcase people in the past who do have not necessarily directly impacted the HVAC&R industry, however whom without our industry would not be possible. Previous subjects were Maxwell – Father of the governor and control theory, Vitruvius, author of De architectura describing the construction and operation of hypocausts, etc. This year we are focusing on Diversity in ASRHAE members with similar lose connections. Currently we're researching Marie Curie for the upcoming year as well. Her research into radioactive elements was critical in the understanding of radiation and of course led to nuclear power generation. While these are loose connections, they no doubt impact our industry greatly, and align with our goals of sustainability. As finding persons who fall under Diversity in ASRHAE who were of historical interest in a direct connection to our industry is quite a large task, I would suggest we also recognize those who have had a strong influence on our industry. I would suggest we propose another PAOE Presidential Initiative:

- a. For identifying and documenting persons who fall under Diversity in ASRHAE of historical interest within the chapter's territory who have greatly influenced the HVAC&R industry.
- b. For identifying and documenting persons who would fall under Diversity in ASHRAE of historical interest within the chapter's country. (worth more points than a )
- c. For identifying and documenting persons who would fall under Diversity in ASHRAE of historical interest within the chapter's territory (worth more points than b) ),

I haven't included points as I'm not sure what would be appropriate. I understand that the PAOE suggestions are typically recommended at the Winter Conference as per Dean's previous email, however I did note item 2 of the 2020-2021 MBO said that to get ahead of the PAOE committee cycle with a proposal for the following year's PAOE Letter in Summer 2021.

- For new business I'd like to suggest that whenever a Gold Ribbon Award is awarded, the winning article be shared via the History RVC's to each chapter Historian, to inspire Historians as well as recognize the work of the winning author.

Thanks!



Click the above links for more information!

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**From:** [Harr, Julie](#)  
**To:** [deanborges@aol.com](mailto:deanborges@aol.com); [smorasch@firstenergycorp.com](mailto:smorasch@firstenergycorp.com); [abiyik@gazi.edu.tr](mailto:abiyik@gazi.edu.tr); [niss@deltatdesigns.ca](mailto:niss@deltatdesigns.ca); [berannag@hotmail.com](mailto:berannag@hotmail.com); [glenremington@live.com](mailto:glenremington@live.com); [odorobranko@gmail.com](mailto:odorobranko@gmail.com); [ahmed.alaa@ashraeuae.org](mailto:ahmed.alaa@ashraeuae.org); [plantguy24@me.com](mailto:plantguy24@me.com)  
**Subject:** RMCR List  
**Date:** Thursday, June 3, 2021 2:33:00 PM  
**Attachments:** [2021-22RMCRs.xlsx](#)

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Gentlemen:

You asked a list of the RMCRs during our meeting today. I will also post this to Basecamp later today.

Best regards,  
Julie Harr