

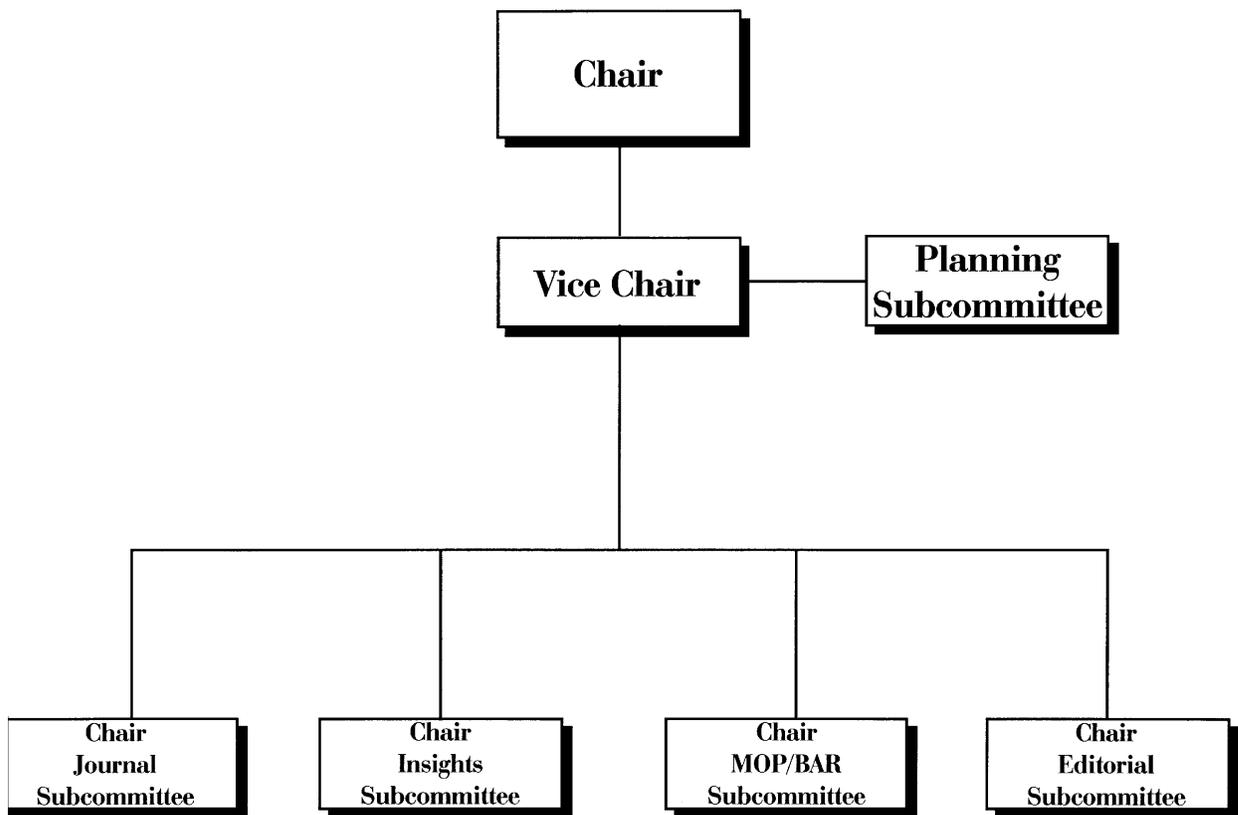
Publications Committee

REFERENCE MANUAL

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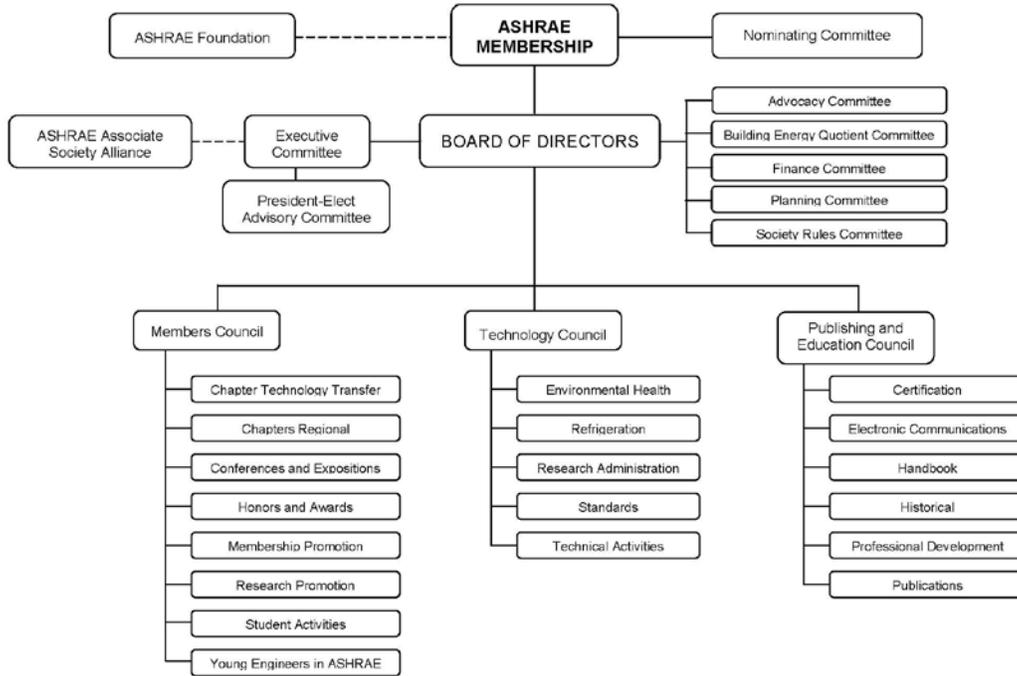
I. Publications Committee Organizational Chart



II. Society Organizational Chart

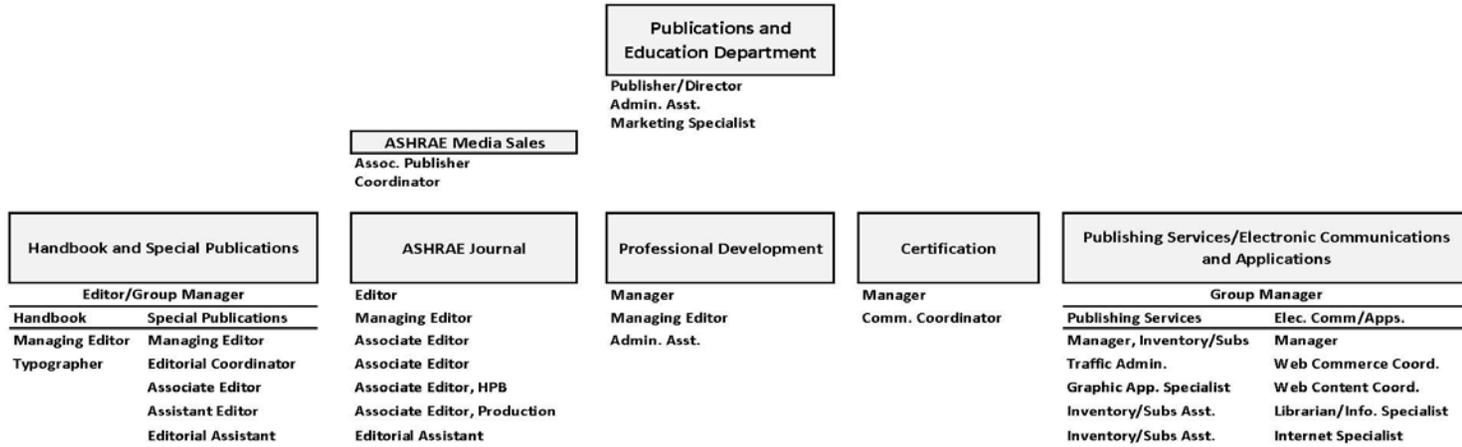


ASHRAE STRUCTURE



Effective 2012-07-01

III. Publications and Education Department Organizational Chart



IV. Preparation of MBOs

If any committee does not submit its objectives to the council at the Annual Meeting, the assigned DAL (BOD Ex-Officio) is responsible for contacting the incoming committee chair and working with him/her to complete objectives.

The Assistant to the Board of Directors will send copies of objectives to the BOD Ex-Officio, committee staff liaison and council staff liaison. Staff liaisons will send objectives to committee and council members.

Each objective should be measurable and should include a projected completion date, fiscal impact (if any) and other information that would clarify the intent of the objective. If an objective is to be assigned to a specific member or subcommittee of the committee, this should also be included.

The Committee Management by Objectives (MBO) should include an objective for mentoring, which will be reported to the Council at each meeting. The mentoring program will be monitored to determine its effectiveness through the mentoring program.

The Committee Management by Objectives (MBO) should include an objective for the status of the International Subcommittee's actions, results, and effect on international membership and readership of ASHRAE publications. This will be reported to the Council at each meeting.

A status report of the objectives will be included in the committee report submitted to the council at the Society Winter Meeting, and a copy of the objectives will be sent to the Assistant to the Board of Directors.

A final report of the objectives will be included in the committee report submitted to the council at the Society Annual Meeting, and a copy of the objectives will be sent to headquarters staff. The objectives prepared by the committee vice chair for the next year (or by the individual who will be the next year's chair) will also be included in this report. These two reports on objectives will show the council what the committee accomplished during the Society year that is ending and what is planned for the upcoming year.

V. Guidelines for Management By Objectives

_____ Committee

Chairman: _____

Society Year: 20____-20____

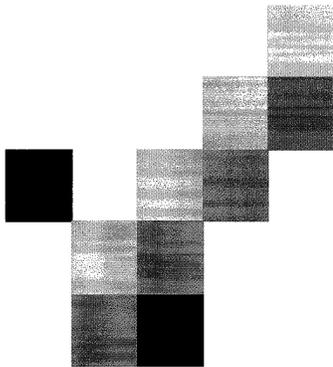
Date: _____

| Objective | Planned Completion Date | Fiscal Impact | Responsibility | Program Approved | Cost Budgeted | Status |
|-----------|-------------------------|---------------|----------------|------------------|---------------|--------|
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

- List objectives, not action items or ongoing committee activities such as updating the committee's MOP.
- State objectives in clear, concise, measurable language. If necessary, cite subtasks and interim steps as a means of measuring objective completion.
- Cite both the completion date for the overall objective as well as individual subtasks.
- State fiscal impact in dollars, man-hours, or man-trips. State whether the program has been approved by the council and whether its cost has been included in the budget.
- State the primary responsible individual, subcommittee, or body.
- Report a brief but complete statement of status. Cite completion date if objective is fulfilled.

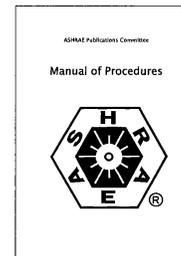
VI. New Member Orientation Training Material

PowerPoint presentation shown at Committee meeting in June 2004



Publications Committee Orientation

June 2004





Publications Committee Purpose

- To formulate the editorial policies for most ASHRAE periodicals, books and software products. Publications Committee does not cover *ASHRAE Handbook* and *The International Journal of HVAC&R Research*.



Products Covered

- ASHRAE Journal
- ASHRAE Insights
- IAQ Applications
- eNewsletters
- ASHRAE Transactions
- Special publications such as design manuals, application guides, conference proceedings, software, and databases. This includes print and nonprint formats.



Committee Organization

- Chair
- Vice Chair
- Eight members (reappointed annually for three years)
- Coordinating Officer
- BOD Ex-Officio
- Staff Liaison



Committee Relationships

■ Publications Committee reports to the Publishing and Education Council

- The Publications Committee chair is a non-voting member of the Publishing and Education Council.
- The Publications Committee chair is the Publications Committee's reporting channel to the Publishing and Education Council and to the Board of Directors.



Publications Committee Duties

- Attend 2 to 4 meetings each year
- Read each issue of the Journal and Insights thoroughly
- Review ASHRAE Journal and ASHRAE Insights as required
- Recommend Best ASHRAE Journal feature articles for awards
- Read other publications and make suggestions
- Generate topics suitable for ASHRAE Journal
- Review Journal editorial calendar and provide feedback to the editor
- Recommend to Publishing and Education Council editorial products that should be published and the method of publication



Planning Subcommittee

■ Meets prior to each meeting to:

- Review objectives to be reported with recommendations to the full Committee,
- Review and report on Journal features calendar, and
- Establish proposed Committee budget



Standing Assignments

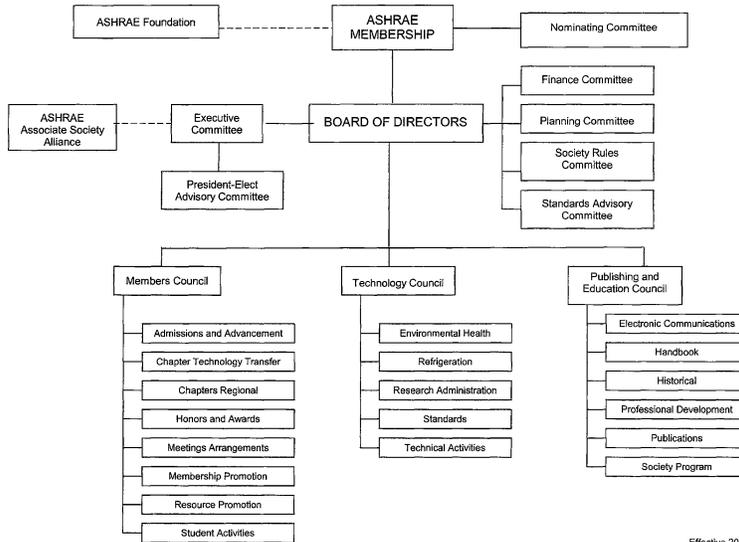
- Chair
 - Presides at meetings
 - Represents Committee at Publications and Education Council meetings
 - Serves as member of the Publications and Education Council Advertising Sales Subcommittee
 - Serves as member of the Publications and Education Council Fiscal Planning Subcommittee
 - Assigns Committee functions
- Vice Chair
 - Presides at Planning Subcommittee meetings
 - Maintains Committee MOP
 - Fills in for chair if needed



Assignments by Chair

- TAC Liaison
- Journal Review Coordinator
- Liaisons to other committees as needed
- Insights Review Coordinator

ASHRAE Society Structure



Effective 2004-07-01

VII. Guidelines for Motions and Resolutions and Motions to Councils Form

Motions and resolutions coming from committees can be most effective if presented in proper form. Often an excellent conceptual resolution is lost in the legislative process at Council and Board level for want of proper wording, background, explanation or research. The purpose of this document is to furnish suggestions for proper development of motions for presentation to Councils and the Board of Directors.

First, it is important to understand the legislative process at Society level. Committees reporting to Councils present motions generated either by Chapters' Regional Committees or from within the General Committees. If the matter impacts other Society committees, communication should be established by the Committee Chairs to try to resolve any problems or conflicts *prior* to presenting it to their respective Council. Motions containing fiscal impact, if passed by the Council, will be presented to the Finance Committee by the Council Fiscal Planning Subcommittee as a part of the Council's proposed budget (unless it is within the Council authority to spend or act on).

Should other Councils be impacted, appropriate communication should be established by the Council Chairs for resolution of any conflicts and as information. Society Directors-at-Large have a concurrent responsibility to see that there is a cross-communication between Committees and Councils.

Once the motion has received Council approval, it goes to the Board of Directors for action or as information. Board of Directors' action will be reported to the Council and Committees. In matters affecting the Presidential Award of Excellence, the Councils will direct these to the President-Elect, since the award criteria are the President-Elect's responsibility. Matters of interpretation or allocation are directed to appropriate staff members. The Committee Chairs should take guidance from the Directors-at-Large in preparing motions.

- A. *Motion Format:* The motion should be written in concise, succinct language ("whereas" and "legalese" do not enhance the comprehensibility or acceptability of motions). The body of the motion should contain as completely as possible the following information:
1. State completely the action which is being recommended or required. Example: "Move that student dues be lowered..."
 2. Qualify, wherever possible, elements of the motion so that they are not open-ended or open for interpretation, debate or floor negotiation. Example: "Move that student dues be lowered to \$5 per year..."
 3. Include where appropriate the time frame for the execution of your request. Example: "Move that student dues be lowered to \$5 per year effective July 1, 20__" (with background data on fiscal impact if possible).
 4. Where a motion is expected to modify or to become a Rule of the Board (ROB), it should be worded as the proposed ROB is intended to read.
- B. *Required Background Information:* As a separate statement, provide historical background, progression of events, related incidents, or other information that would be helpful for the Council and subsequently the Board of Directors to appropriately debate and decide on the issue. The more thorough the background, the more convincing the arguments, the more complete the research, and the more beneficial the request is to the betterment of the Society, the more likely the matter will be dealt with favorably. Committees should be aware that matters involving fiscal impact must be estimated as closely as possible and presented as background information as part of the process. Any

research and information on fiscal input provided as background will simplify and minimize delays in accomplishing the effect of the motion.

In summary, a good motion spells out who, what, when, how much. It then explains why it is a good and timely action. An example of the motion form is included on the next page.

- C. *Committees*: Have defined scopes of particular activities or areas of Society intent. Committee Chairs report to Councils.
- D. *Councils*: Are arms of the Board of Directors (BOD) and can act for the Board of Directors in a limited capacity in specified areas of interest to their committees. Council Chairs or their assigned Directors-at-Large report to the Board of Directors.
- E. *Board of Directors (BOD)*: Responsible for Society policy.
- F. *Executive Committee of the BOD (ExCOM)*: Acts for the Board of Directors between Board of Directors meetings, and for the Board of Directors on staff matters.

Motion to Councils Form

| | | | | | | | |
|--|-------------|--|-----------------|--------------------|--------------------|--|---------------------|
| Motion to Council: | | | | | | | |
| MOTION IDENTIFICATION NUMBER: | | | | | | | |
| COMMITTEE: | | | | | | | |
| MOTION NUMBER: | | | | | | | |
| DATE: | | | | | | | |
| MOVED BY: | | | | | | | |
| SECONDED BY: | | | | | | | |
| MOTION: | | | | | | | |
| VOTE COUNT: | For: | | Against: | | Abstaining: | | Not Present: |
| CHAIR VOTED: | Yes: | | NO: | | | | |
| REFERRED TO: | | | | FOR ACTION: | | | |
| INFORMATION: | | | | | | | |
| BACKGROUND INFORMATION: | | | | | | | |
| FISCAL IMPACT: | | | | | | | |
| WHY IS THE PROGRAM NEEDED? | | | | | | | |
| WHAT WILL THE PROGRAM ACCOMPLISH? | | | | | | | |

| | |
|--|--|
| WHO WILL BENEFIT FROM THE PROGRAM? | |
| WHEN WILL THE PROGRAM BE IMPLEMENTED AND COMPLETED? | |
| HOW WILL THE PROGRAM BE IMPLEMENTED AND BY WHOM? | |

VIII. ASHRAE Journal Instructions to Authors

As the magazine of the American Society of Heating, Refrigerating and Air-Conditioning Engineers, Inc., *ASHRAE Journal* seeks and publishes application-oriented articles of interest to the membership.

Here are some basic rules and procedures for the submission of an article:

Authors: Articles are welcome from ASHRAE members and non-members.

Submitted Materials: Only unpublished articles will be accepted for review.

Commercialism: ASHRAE policy prohibits the use of proprietary names in the text or illustrations of *ASHRAE Journal* features. This includes trade names, logos, university sponsors, consulting firms, manufacturers, vendors, contracting agencies, or identification of other commercial interests. Generic terms should be used. The following items are permitted: .About the author(s) is on the front page of an article that features information about the author(s), including company affiliation, title and background. Pictures of products are permitted if the trade name or manufacturer's logo or slogan is not visible.

Articles describing research on a specific manufacturer's product may include the producer's name and model number in the text if the inclusion aids comprehension and readership. An example is if a *particular* mineral wool insulation is compared with fiberglass bats for shakedown characteristics in the walls of a mobile home. Remember, however, a well-written, well-illustrated, commercial-free article brings more credit to a commercial interest than similar articles containing blatant commercialism. Articles sometimes include proprietary or patented aspects. Patents should be referenced to make evident the limitations on use. If an author feels that the message cannot be clearly communicated using the above guidelines, the author should provide specific examples to *ASHRAE Journal* editorial and request an exception or guidance.

Confidentiality: *ASHRAE Journal* uses a double-blind review system. The author's name and any references that might reveal the author's identity are removed before sending the article for review. In the same regard, authors are not aware of the identities of the reviewers since the same process is followed with the reviews.

Submitting an Article: We encourage authors to submit abstracts before sending full articles. Abstracts and articles should be sent to Fred Turner at fturner@ashrae.org. The mailing address is Fred Turner, Editor, ASHRAE Journal, 1791 Tullie Circle NE, Atlanta, GA 30329-2305.

How to Submit: Authors are encouraged to e-mail articles in PC format. Articles also can be submitted by mail on computer disk, CD or paper.

Length—Articles cannot exceed 3,000 words.

Graphics—We encourage graphics, and publish as many as four with the article. Graphics should be included as attachments. Do not embed graphics in text. Hard copies of graphics are acceptable if electronic versions are not available in an appropriate format. Details about formats can be found in “The Wired Writer.”

References—References must be listed at the end of the manuscript numbered in the order in which they appear, with superscripted numbers in the corresponding places in the text. A maximum of 10 references may be used.

About the Author—Authors should provide a brief description that includes their name, title, company, and important ASHRAE affiliations.

Statement of Importance (optional)—Authors may provide a one-paragraph explanation of the significance of their article. This is not to be an abstract, summary or conclusion. Instead, this should describe how the information presented is important to the HVAC&R industry.

Electronic Submission: Appropriate formats and other information can be found in “The Wired Writer” (Section XXII).

Units of Measurement: *ASHRAE Journal* policy calls for authors to incorporate dual units of measurement into manuscripts, preferably with inch-pound (I-P) units first, followed by international system (SI) units in parentheses. Authors shall round off the alternate system of units so that they imply the same accuracy as is implied with the primary units. (See SI for HVAC&R Guide). **If practical, charts, tables or illustrations should be submitted with dual units.**

Acknowledgment: *ASHRAE Journal* staff will acknowledge receipt of material within five working days.

Release of Manuscript: The author or authors of papers are requested not to disseminate the manuscript or information contained therein prior to publication.

IX. Editorial Screening and Peer Review Procedures

ASHRAE Journal is a Peer Review magazine. This means articles submitted to the *ASHRAE Journal* are “juried” by member engineers with expertise in the subject area of the article. The author’s name is not revealed to the reviewers, nor are the reviewers’ names revealed to the author. Articles may be screened by editorial board members who rate the article as to its reader interest, timeliness and effective communication of ideas. An example of the peer review form is included as Section XVIII.

The purpose of these reviews is to maintain a high level of technical content and to evaluate the article for its topical interest.

The review process consists of three phases:

1. A preliminary review of the article by *ASHRAE Journal* staff to determine if the article meets the mechanical and other requirements specified in the Instructions to Authors, Section VIII.
2. An optional review of the article by editorial board members to determine reader interest and other criteria as stated above.
3. The review of the article for technical accuracy and content by three ASHRAE members with expertise in the paper’s subject area.

Confidentiality

If published, the manuscript will be copyrighted by ASHRAE, so the manuscript’s contents are not to be used by the reviewers without the express written permission of ASHRAE. If the article is not accepted for publication, the privilege of copyright remains with the author.

Procedures

1. If *ASHRAE Journal* staff finds the article does not meet the specifications, the manuscript is returned to the author with appropriate comments. The author may correct any omissions and resubmit the manuscript.
2. Articles meeting the mechanical requirements are normally acknowledged within five working days of receipt. *ASHRAE Journal* staff help determine suitable reviewers who have expertise in the subject area, often with the aid of the technical committee chair.
3. Each reviewer is sent a complete copy of the article (including charts, tables, figures and photos) *with the author’s name and affiliation deleted*. The reviewers are asked to read the article and evaluate it using the criteria previously stated. Reviewers are asked to return the manuscript with their review comments within two weeks of receipt.

4. Responses by the reviewers fall into three categories:
 - a. Accepted for publication “as is”;
 - b. Recommended for publication with certain revisions and/or deletions;
 - c. Rejected It is mandatory for the editorial staff to reject an article if more than 50% of peer reviewers do not recommend publication.
5. In all cases, the author is treated to a commentary of each reviewer—*without revealing names*. Upon acceptance of the article, the author is asked to send reproduction quality illustrations and a brief business and educational biography.

On articles requiring revision, the author is asked to make the deletions and/or revisions suggested by the reviewers and to return the edited and corrected manuscript with the above materials.

Rejected articles including detailed comments by reviewers are returned to the author.

6. Preparation for publication includes changing the article title if necessary to indicate the content in suitable magazine-style headings. The editorial department specifies typefaces and prepares the final layout.
7. After publication, the author is sent complementary copies of the issue in which the article appeared. *ASHRAE Journal* retains the article’s copyright, unless the author has stated prior to publication that the author will retain the copyright.

X. ASHRAE Journal Review Form

ASHRAE Journal Review Form

Reviewer:

Evaluation:

Cover:

Overall Impression:

Recommendation for Best Paper:

Rating Articles: Please rate the issue's articles using the following scale:

0-3: poor 4-5: adequate 6-7: good 8-10: excellent

Use "NA" when appropriate.

| Title | Introduce Goals | Technical Content | Clarity of Presentation | Graphics | Conclusions | References | Overall Assessment |
|---------------------------|-----------------|-------------------|-------------------------|----------|-------------|------------|--------------------|
| | | | | | | | |
| General Comments:* | | | | | | | |
| | | | | | | | |
| General Comments:* | | | | | | | |
| | | | | | | | |
| General Comments:* | | | | | | | |
| | | | | | | | |
| General Comments:* | | | | | | | |
| | | | | | | | |
| General Comments:* | | | | | | | |

*"General comments" can include evaluation of content, strength and weaknesses of presentation, and alternative viewpoints.

The objective of the editorial review is to ensure that *ASHRAE Journal* publishes articles that are relevant and appealing in presentation and content to broad segments of ASHRAE membership.

(Review continues on next page.)

Part 2—Much of the value of the Journal to members and other readers derives from departments and special sections. This section covers content other than the technical features. Thinking about the target ASHRAE audiences, please rate the following items on a scale of 1 to 5 in terms of value for these readers.

| Item | Scoring: Value to Journal Readers | | | |
|-------------------------|-----------------------------------|-----------|--------------|-----------------|
| | 1 = Not Useful | 2 = Poor | 3 = Adequate | 4 = Good/Useful |
| Special Sections | | | | |
| | Score: | Comments: | | |
| Departments | | | | |
| | Score: | Comments: | | |

Please save as an attachment and e-mail to Rebecca Norris at RNorris@ashrae.org by **FILL IN DATE.**

Or print and fax to 678-539-2185.

If you are unable to complete the review by the above date, return the form as soon as possible.

Thank you for your time!

XI. Peer Review Procedure for Special Publications *

(Draft May 25, 2004)

The Chair of TAC will be notified by staff on a regular basis of all new Special Publications that are approved by the Publications Committee to start development at the TC/TG/TRG level.

The TAC Chair, in consultation with TAC members, will determine whether a new Special Publication requires a broader peer review by members of other TCs and TGs. Once a decision to conduct a broad review is made by the TAC Chair, the Chair of the TC/TG/TRG sponsoring the Special Publication will be notified in writing to implement the following procedure for broad peer review:

1. Transmit to all TC/TG/TRG chairs and members of TAC through ASHRAE staff the working title, purpose, and scope of the proposed new Special Publication. Request in the transmittal message that an interested TC/TG/TRG recommends a candidate to serve as a TC representative on the subcommittee developing and/or reviewing the Special Publication. The sponsoring TC/TG/TRG chair will appoint members of the subcommittee for the Special Publication with the approval of his/her Section Head.
2. Transmit to all TC/TG/TRG chairs and members of TAC through ASHRAE staff a list of dates when a draft copy of the Special Publication will be available from the sponsoring TC/TG/TRG for open review comments consistent with the following development milestones:

| <u>% Completion</u> | <u>Purpose of Open Review</u> |
|---------------------|-------------------------------|
| 50 | Major conceptual concerns |
| 80 | Errors and omissions |
| 100 | Factual errors |

The period for open review of the drafts and submission of comments shall be four weeks.

3. The subcommittee for the Special Publication shall collect, group (if possible), and summarize comments that are received during the open review periods and issue a document listing the summarized comments and the subcommittee's responses to them to all TC/TG/TRG Chairs and members of TAC through ASHRAE staff.
4. TAC shall have the authority to direct certain changes to the Special Publication that they deem necessary for broad Society acceptance of the Special Publication before it is published.

XII. ASHRAE Journal Readership Breakdown Example

*From the TC/TG/TRG MOP and is for reference only.

| <u>Occupation:</u> | <u>Total</u> |
|--|--------------|
| Consulting Engineers and architects | 32.9% |
| Contractors and Contracting Firms | 17.8% |
| Engineering Management and Engineering Staff in charge of services for Industrial/Manufacturing Firms | 10.5% |
| Engineering Management and Engineering Staff in charge of services for buildings | 10.6% |
| Wholesalers, Manufacturers' Agents and Sales Engineering Firms | 10.0% |
| Educational Institutions, Public Libraries, Technical Associations, Students | 8.0% |
| Others allied to the field | 10.2% |
| | Equals 100% |

| <u>Geographical Analysis</u> | |
|------------------------------------|-------------|
| United States and U.S. Possessions | 78.64% |
| International | 21.36% |
| | Equals 100% |

XIII. ASHRAE Journal General Information and Definitions

This information is intended to broaden the understanding of new committee members so that they may immediately and effectively contribute (within the committee areas of responsibility) to the best possible *ASHRAE Journal*.

Committee Responsibilities

The Publications Committee is responsible for those pages of *ASHRAE Journal* within the Editor's area of responsibility. They set broad editorial policy and goals. The Editor is responsible for detailed operating plans that implement the broad policy and goals. The Editor is responsible for the business of selecting articles and departments. The Editor may elect to solicit committee help with regard to the long-range editorial calendar, selection of authors for selected long-lead articles, and serve as an editorial board to judge articles for reader interest. The Publications Committee is not responsible for the advertising pages of *ASHRAE Journal*. The Advertising Sales Subcommittee of the Publishing and Education Council is responsible for all aspects of advertising in *ASHRAE Journal*.

The Publications Committee Chair is a nonvoting member of the Publishing and Education Council.

The Publishing and Education Council is responsible for all publishing including the *ASHRAE Journal*. The Publishing and Education Council sets the budget, the financial goals, the editorial/advertising ratio and the advertising policies and rates of *ASHRAE Journal*. The Publications Committee is responsible to the Publishing and Education Council for the overall success of *ASHRAE Journal*. As such, the Publications Committee should require the Publishing Director to present long- and short-range plans and MBOs for *ASHRAE Journal*. The Publications Committee should offer suggestions and negotiate changes with the Publishing Director. If the Publications Committee feels strongly about changes to the advertising ratio, graphics, arrangement of articles within *ASHRAE Journal*, advertising sales or any other issue, then the Publications Committee should make recommendations to the Publishing and Education Council.

The Advertising Sales Subcommittee of the Publishing Council is responsible for *ASHRAE Journal* advertising pages including sales program, recommendations, advertising policy development, and advertising rates. This subcommittee sets the annual ratio of advertising pages to total pages for *ASHRAE Journal*. This ultimately has a significant effect on the number of pages available for *ASHRAE Journal* feature articles. Members include: (1) the Chair of the Publishing and Education Council, who is a society vice-president and a member of ExCom, (2) the Chair of the Fiscal Planning Subcommittee of the Publishing and Education Council, (3) the Chair of the Publications Committee, (4) *ASHRAE Journal* Publisher, and (5) the Director of Publishing and Education, who provides staff liaison and is a nonvoting member.

Staff Organization

The Publisher of *ASHRAE Journal* is ultimately responsible for all aspects of the magazine: editorial quality, readership, delivery and financial performance. The Publisher reports directly to the Executive Vice President.

The Publishing Director is the ASHRAE Director of Communications and Publications. The Publishing Director acts for the Publisher on a day-to-day basis. The Publishing Director reports to the Publisher.

The Advertising Sales Manager is an ASHRAE employee responsible for coordinating advertising sales. Actual advertising sales are handled by independent sales representatives who normally represent *ASHRAE Journal* and several other magazines. The Advertising Sales Manager reports to the Publishing Director.

The Production Manager and Production Department report directly to the Publishing Director and are responsible for printing the magazine and managing production costs and production schedules.

The *ASHRAE Journal* Editor and Journal staff are ASHRAE employees responsible for feature articles pages and department pages. The Editor reports to the Publishing Director. Refer to the following attachment to this Appendix for a detailed organizational chart of the Publishing and Education staff.

Definitions

Book: Editors and the publishing industry refer to a magazine as a book.

Signature: In the printing process a large sheet of paper is run through the press and subsequently machine cut and collated into 4, 8, 16 or 32 page increments of a magazine. The 4, 8, 16 or 32 page increment is referred to as a signature. A 32-page signature results in the lowest cost per page. A typical *ASHRAE Journal* might be 100 pages consisting of three 32-page signatures, plus the 4 pages of the front and back cover sheets. If the editorial and advertising staffs have 4 additional pages of copy, this would require an additional 4-page signature. The incremental cost per page for these 4 pages is relatively expensive and the publisher may elect to cut Department pages or a 4-page feature article in order to achieve a 100-page, more economical magazine.

Total pages: Generally, the number of pages within signatures plus the cover, inside front cover, inside back cover, back cover plus any inserts. *ASHRAE Journal* is a “perfect bound” book. The smallest “perfect bound” book that our printer can produce is two 32-page signatures plus covers and inserts (68 pages plus inserts).

Feature article pages: The principal means of building and maintaining reader interest, reader loyalty, and the perception of the magazine by the advertiser. Feature article pages are the heart of the magazine and are a major determinant in member and advertiser perception of the value of the magazine.

Advertising pages: Paid advertisements. The sum of all full and partial page advertisements including those advertisements in the classified section that are more than one column wide. The total number of advertising pages determines the size of the magazine (see advertising/editorial ratio).

Editorial pages: Defined as everything other than paid advertising. Editorial pages include feature articles and departments. Although BARs require J/I budget reimbursement for insertions, advertisements and notices made for other committees, there is no clear-cut policy on the cost reimbursement per page nor is there any policy on adjustment of the advertising to editorial ratio for a specific issue or for the annual average to adjust for these insertions. Inserts should not adversely impact the Publications Committee budget nor should they count as editorial pages.

Classified Advertising and Advertising Index Pages: The Publisher currently classifies these as a service for the reader. Although classified advertisements are paid advertising, the rate structure for a page of single column width classified insertions does not equal that of a full page display advertisement. Therefore, classified advertisements count as editorial pages and not as advertising pages in determining the advertising/editorial ratio. This same policy applies to the advertising index page.

Advertising/Editorial ratio: The ratio of advertising pages to the total pages in a magazine. For budget control purposes, most publishing companies set a tight goal on the advertising ratio averaged over a one-year period. There is no stated policy on whether advertising for ASHRAE publications, professional development seminars and cosponsored meetings are counted as advertising or editorial pages. These advertisements are handled at cost. The advertising ratio for the ASHRAE Journal is currently set by the Advertising Sales subcommittee of the Publishing and Education Council at 55% for twelve issues. The January show issue usually exceeds 55% advertising, which helps to cover lower advertising ratios in some other months.

Department Pages: These can be broken down into basic necessities, recurring items, reader service and advertising-related items. In a typical issue, Departments require 20 to 26 pages (average 24 pages). A typical issue might include the following:

| Description of Department Pages | Pages |
|--|--------------|
| Front cover, Contents and Editor Commentary | 3 |
| Corrections/Letters to the Editor | 1 |
| Industry news and conference reports | 3 |
| Washington Report..... | 1 |
| Standards and actions | 2 |
| Meetings and Shows..... | 0.5 |
| Calls for Papers | 0.5 |
| People..... | 0.5 |
| Feature products with reader response number | 3 |
| New products with reader response number..... | 4 |
| Literature and Software w/reader response number | 1 |
| Classified advertisements | 4 |
| Advertising index | 1 |
| Total Department Pages | 24.5 |

At a 55% advertising ratio, the number of feature article pages is equal to the number of advertising pages minus 24 Department pages. The following table provides examples of this formula:

| | | | | | | |
|--------------------|----|----|-----|------|-----|-----|
| Signatures (32 p.) | | 2 | 2.5 | 3.25 | 3.5 | 4 |
| Total Pages | 68 | 76 | 84 | 100 | 116 | 132 |

| | | | | | | |
|------------------|----|----|----|----|----|----|
| Ad ratio % | 44 | 47 | 50 | 50 | 55 | 55 |
| Paid Ad page& | 30 | 36 | 42 | 50 | 64 | 73 |
| Departments | 24 | 24 | 24 | 24 | 24 | 24 |
| Remaining pages | 14 | 16 | 18 | 26 | 28 | 35 |
| Average Features | 4 | 4 | 5 | 7 | 7 | 9 |

Notes:

- The advertising ratio is less than 55% for all but 3.5 and 4 signature examples.
- The goal of the Publisher is to make up the deficit in the advertising ratio in the 200 to 250 page January show issue.
- The main function of Journal/Insights is to target excellent feature topics and authors so that each issue contains feature articles that are valuable to the readers. This will enhance readership and the advertisers' perception of the magazine. Advertising will follow.

XIV. ASHRAE Journal Contents and Procedures

- A. *Editorial Calendar:* An editorial calendar shall be distributed to the Committee at the Annual Meeting. The calendar shall include schedule of themes planned for the Journal for the coming calendar year. The editorial calendar is to be used during liaison meetings as an aid in finding papers/presentations that may be considered for inclusion in the Journal.
- B. *Instructions to Authors:* Journal editorial department shall prepare and have a set of instructions available for members, liaisons and others to distribute for guiding prospective authors in the preparation of an article.
- C. *Article Review Procedure:* Journal editorial department shall have available a brief description of the Committee's editorial screening process and peer review procedures used in evaluating an article being considered for publication in the Journal. Refer to the Editorial Screening and Peer Review Procedures (Section IX) for a detailed description of the article review process.
- D. *Journal Departments:* The Journal editor shall establish and include departments such as industry news, meetings, products, literature, legislative reports, people, ASHRAE news, etc., as benefits the communications role of an industry publication.

XV. Duties of Various Publications Committee Members

BOD Ex-Officio:

- Is a nonvoting member of the committee, its subcommittees and its EXCOM.
- Is invited to attend and participate in all committee, subcommittee and EXCOM meetings. The BOD Ex-Officio's attendance may be counted towards quorum requirements.
- Is a voting member of the Publishing and Education Council to which the committee has been assigned.
- Moves committee motions to council, and acts as an advocate for the committee in all relevant discussions.
- Communicates results to committee Chair.
- Assists committee in preparation of written motions; e.g., Do they include answers to Who? What? When? Why? and How much? Has the fiscal impact been budgeted by ASHRAE, and if so, in which fiscal year?
- Communicates committee plans to other DALs to allow for intercommittee contribution and cooperation.
- Conveys presidential goals to the committee and the subcommittees.
- Assists in preparation of the committee's "objectives" in order to satisfy the committee's scope, presidential goals and strategic plans.
- Assists the committee and staff liaison in the process of monitoring progress toward timely completion of objectives.
- Assists the committee in the ongoing review of the Manual of Procedures, Reference Manual, relevant Rules of the Board and Strategic Plan objectives.
- Suggests changes in assigned scope, function and personnel.

- Receives copies of all committee correspondence, including invitations to all committee-related meetings.
- Attends BOD meetings; proposes to the Board the Council motions from committees to which the individual is Ex-Officio, and acts as an advocate in all relevant discussions. Interprets Board and Council actions to the committee.

MOP/BAR Subcommittee

The Vice Chair shall be appointed by the Chair to represent the committee in proposing changes to the Manual of Procedures (MOP).

The Subcommittee shall review the Board Approved Rules and advise as they pertain to the Publications Committee and advise any suggested revisions or additions that may be proposed to the Publishing and Education Council.

Note: An electronic version of the MOP and BAR is available from the Staff Liaison.

International Subcommittee

The Chair of the International Subcommittee shall be appointed by the Publications Committee Chair and/or Vice Chair. It shall be this subcommittee's goal to:

- a. Develop recommendations for ASHRAE policy and/or strategy to ensure that publications are effectively marketed and provided to the international community.
- b. Define the means by which the Publications Committee can foster support for and market publications within the international community.
- c. Ensure the technical quality and marketing efforts of ASHRAE publications are well received internationally.

TAC Representatives:

1. Attend assigned TAC TC Section breakfast at Annual and Winter Society meetings to develop leads and authors for topics and articles for the Journal.
2. Contact Section Heads for assigned TAC Sections one month before the Society Annual and Winter Meeting, enclosing the Journal editorial calendar and Journal Report form and announcing your visit to the TAC breakfast for the purposes stated in Item 2.

TAC Liaison

The Liaison shall have the following responsibilities with respect to Technical Activities (TC Sections):

1. Assist Journal/Insights staff in obtaining material suitable for publication in the Journal and Insights. This involves working with the TC Chair to get articles from the TC members. Discuss inclusion of articles outside the editorial calendar theme (“wild card” articles) with the TC Chair.
 - a. Article suitability is initially determined by the joint perception of the liaison and the Technical Activities Committee members.
 - b. The liaison member shall also update TAC Sections on Journal and Insights editorial calendars.
2. Solicit input from the TC Sections regarding their suggestions for Journal and Insights articles, editorial calendar themes and other content.
3. Attend assigned TC section Monday-morning breakfast for Chair to distribute editorial calendar and request input/assistance in securing articles and authors.
4. Write letters to each assigned Section Head and its TC Chair prior to the Annual and Winter ASHRAE meetings to solicit articles and input. Refer to Appendix C for the assignment form for liaisons to TCs and sample letters for the TC Chairman and Section Head.

XVI. Journal Liaison TC Form

20__-20__ Journal Liaison to TCs

| Technical Committee Section | Assigned Liaison |
|--|------------------|
| Section 1. FUNDAMENTALS AND GENERAL | _____ |
| Section 2. ENVIRONMENTAL QUALITY | _____ |
| Section 3. MATERIALS AND PROCESSES | _____ |
| Section 4. LOAD CALCULATIONS AND ENERGY REQUIREMENTS | _____ |
| Section 5. VENTILATION AND AIR DISTRIBUTION | _____ |
| Section 6. HEATING EQUIPMENT, HEATING AND COOLING SYSTEMS AND APPLICATIONS | _____ |
| Section 7. BUILDING PERFORMANCE | _____ |
| Section 8. AIR-CONDITIONING AND REFRIGERATION SYSTEM COMPONENTS | _____ |
| Section 9. BUILDING APPLICATIONS | _____ |
| Section 10. REFRIGERATION SYSTEMS | _____ |

Note: Refer to the front section of ASHRAE Handbooks for the names of technical committees assigned to each section.

XVII. ASHRAE Journal Editorial Board Review Manuscript Screening Form

Manuscript Title:

Date Sent:

Date Due:

Mission Statement:

To provide the latest HVAC&R information and technology through application-oriented articles. The purpose of the editorial board review is to ensure that *ASHRAE Journal* publishes informative, interesting manuscripts on a variety of topics. Accordingly, please review the attached manuscript and answer the following questions.

1. Will this manuscript have broad readership interest?
No ____ Yes ____

2. Does the author effectively communicate ideas and concepts?
No, better explanations are needed ____ Yes ____

3. Does the author substantiate the conclusions?
No, more information is needed ____ Yes ____

4. Does the author adequately document/reference general statements?
No, better references are needed ____ Yes ____

5. Is the information presented of value to experienced or new engineers?
Experienced ____ New ____ Neither ____ Both ____

6. Considering all factors, how do you rate the manuscript overall?
0 1 2 3 4 5 6 7 8 9 10
7. Should a manuscript with an opposing view be solicited? If yes, please recommend an author.
No ____ Yes _____
8. Please use the following lines and the back of this sheet to make any other comments or recommendations regarding this manuscript or to provide any specific recommendations.

XVIII. ASHRAE Journal Peer Review Manuscript Screening Form

Manuscript Title:

Date Sent:

Date Due:

Mission Statement:

To provide the latest HVAC&R information and technology through application-oriented articles. The purpose of the peer review is to ensure that informative, technically accurate manuscripts are published in *ASHRAE Journal*. Accordingly, please review the attached manuscript and answer the following questions.

1. Does this manuscript address a technical issue of current interest?
No ____ Yes ____

2. Does the author effectively communicate ideas and concepts?
No, better explanations are needed ____ Yes ____

3. Is the technical content of this manuscript correct?
No, there are major errors ____ Yes, minor errors only ____

4. Does the author substantiate the conclusions?
No, more information is needed ____ Yes ____

5. Does the author adequately document/reference general statements?
No, better references are needed ____ Yes ____

6. Is the information presented of value to experienced or new engineers?
Experienced ____ New ____ Neither ____ Both ____

7. Considering all factors, how do you rate the manuscript overall?
0 1 2 3 4 5 6 7 8 9 10
8. Should a manuscript with an opposing view be solicited? If yes, please recommend an author.
No ____ Yes _____
9. Please use the following lines and the back of this sheet to make any other comments or recommendations regarding this manuscript.

XIX. ASHRAE Insights Questionnaire

1. How do you find the balance of news coverage presented in Insights?

| | More | Just Right | Less | | |
|----------------------|-------|------------|-------|-------|-------|
| Society News | | | | | |
| Chapter News | | | | | |
| Committee Activities | | | | | |
| ASHRAE Publications | | | | | |
| Chapter News | | | | | |
| ASHRAE Education | | | | | |
| Departments | | | | | |
| Length of Articles | | | | | |

What other types of news items should be covered?.....

2. Overall, how would you rate the paper’s appearance?

Excellent Good Okay Poor

3. Overall, how would you rate the meeting supplement?

Excellent Good Okay Poor

4. How would you rate the online version of the April issue of Insights?

Good Fair Poor

| | | | |
|--------------------|-------|-------|-------|
| News Presentation | | | |
| Ease of Navigation | | | |
| Quality of Photos | | | |

Do you have any comments or suggestions for the online issue?

Please return the completed survey by April 26 to Don Eppelheimer by faxing to 608-787-3005 or by e-mail to deppelheimer@trane.com

XX. Operating Guidelines for IAQ Applications

I. Editorial Focus

The editorial philosophy of ASHRAE's IAQ Applications will be to provide practical, reliable information on indoor air quality (IAQ) that enables readers to put improved design and operation of HVAC systems into practice. The content of the publication will include:

- Application studies that have been screened for reliability so that systems can be better designed and operated for IAQ.
- News of IAQ related topics as they relate to the profession and industry.
- Reviews of emerging health issues relating to IAQ so building professionals have a better understanding of health issues.
- A forum for ideas among practitioners to be discussed and debated, including commentary by IAQ authorities.
- New product announcements.
- Standards development news as it relates to IAQ.
- Government actions related to IAQ.

II. Oversight

a. Fiscal Policy

i. Business Objective: The IAQ publication should make a positive contribution to the Society's revenue stream. To meet this objective, subscription fees will be set to cover all costs of publication, including staffing and promotion. There will not be advertising initially, but acceptance is not prohibited. When circulation levels are established after publication of the preview issue, the feasibility of advertising will be judged.

ii. Responsibility: The Publishing and Education Council shall have responsibility for setting fiscal policy for IAQ Applications as it does for ASHRAE Handbook, ASHRAE Journal, ASHRAE Insights, and Special Publications. The council's Fiscal Planning Subcommittee monitors fiscal performance of these publications. The publisher manages the business function of IAQ Applications, determining frequency, length, size and circulation issues based upon approved budgets.

b. Editorial Policy

i. Editorial Objective; IAQ Applications should help practitioners understand and apply technology and practices that provide for acceptable indoor air quality.

ii. Responsibility: The Publications Committee shall have responsibility for editorial policies pertaining to IAQ Applications as it does for ASHRAE Journal

and ASHRAE Insights. The editor manages the development of editorial content for IAQ Applications. The editor will report on execution of editorial responsibilities at each meeting of the Publications Committee. The editor shall be responsible for communicating the publication's editorial policy to the publication's editorial board and contributing editors and for maintaining this policy. The editorial board and contributing editors assist the editor in technical matters, but they do not set editorial policy.

III. Structure

a. Publisher

The Publisher of IAQ Applications shall be the publisher of ASHRAE publications.

b. Editor

The Editor of IAQ Applications shall be the editor of ASHRAE Journal.

c. Editorial Board

i. Purpose: The editorial board shall provide technical guidance to the editor in the field of IAQ, assisting the editor in the resolution of editorial questions and identifying ways in which IAQ Applications can fulfill its editorial objective.

ii. Number: The editorial board shall consist of at least 4 persons.

iii. Selection: Members of the editorial board shall be selected by the chair and vice chair of the Publications Committee and Environmental Health Committee. The Publications Committee will make appointments in odd-numbered years. The Environmental Health Committee will make appointments in even-numbered years. Unanimous approval is required. The selection of editorial board members will be made prior to the Society's Annual Meeting each June, allowing adequate time for proposed candidates to confirm acceptance. The chair of the Publications Committee and chair of Environmental Health Committee will report their selections to their respective committees at the Annual Meeting. Members of the editorial board shall be selected on the basis of their involvement in or knowledge of engineering practice.

iv. Terms: The term of service shall be 4 years. To stagger the terms of service of board members initially, one member shall be appointed for a 1 year term, one for a two-year term, one for a three-year term and one for a four-year term. Any person who does not serve a full four-year term may be re-appointed. Thereafter, all persons selected to serve on the editorial board shall be for a four-year term. Terms shall begin in conjunction with the start of the Society's fiscal year (July 1).

- v. *Duties:* The duties of the editorial board include the following:
- Respond to requests by the editor for editorial judgments.
 - Review articles for accuracy and relevance to current engineering practice.
 - Select, in cooperation with the editor, contributing editors.
- vi. *Meetings:* The editorial board will not hold regularly scheduled meetings. Communication will be via Internet and telephone conference call. The editor may meet with members of the editorial board on an as-needed basis.

d. Contributing Editors

- i. *Purpose:* The contributing editors, along with providing general guidance to the editor, will also provide editorial manuscripts for publication.
- ii. *Number:* There shall be three contributing editors.
- iii. *Selection:* The contributing editors shall be recommended by the editor and their selection approved by the editorial board. Unanimous approval by the editorial board is required. Members shall be chosen on the basis of their involvement in or knowledge of engineering practice.
- iv. *Terms:* The term of service shall be for 2 years. Contributing editors may be reappointed. Terms shall begin in conjunction with the start of the Society's fiscal year (July 1).
- v. *Duties:* The duties of the contributing editors include the following:
- Prepare three columns per year for publication in IAQ Applications.
 - Provide written reports for publication of IAQ events and conferences.
 - Solicit editorial material for the editor.
 - Edit articles at the request of the editor to meet the editorial space limitations of IAQ Applications.
 - Meet deadlines established by the editor. (Contributions by the contributing editors are required 30 days prior to publication.)
- vi. *Meetings:* The contributing editors will not have regularly scheduled meetings. Communication will be via Internet and telephone conference call. The editor may meet with members of the editorial board on an as-needed basis.
- vii. *Honorarium.* The contributing editors shall each be paid a \$1,500 honorarium annually. Additional reimbursement for travel will not be provided.

XXI. Mentoring Program

(ROB 100-128-003)

During the final meeting of the Fiscal Year, the Board of Directors/Board of Governors, Council or Committee Chair shall appoint an incumbent to be the mentor for an incoming member. A mentor should be appointed for each new member. The mentor will be responsible for the following tasks:

- Before the next meeting of the Board of Directors/Board of Governors, Council or Committee Meeting, the mentor should contact the new member by telephone, letter, fax or email to introduce himself/herself and explain the new relationship and its purpose.
- The mentor should make every effort to update the new member on:
 1. Board of Directors/Board of Governors, Council, Committee or Chapter functions, focus and objectives.
 2. Review the Board Approved Rules (BAR) and Manual of Procedures (MOP) with the new member.
 3. Discuss the typical meeting format and member duties and responsibilities.
- The mentor should plan to meet the new member before the respective meeting is scheduled to start and introduce him/her to the chair and early arriving members. The mentor should also introduce the new member with pertinent data such as:
 1. Member's field of expertise and employer
 2. Chapter and city of the new member
 3. Former chapter, region and Society positions previously held by the new member
- The staff liaison will send a copy of the group Board Approved Rules (BAR), Manual of Procedures (MOP) and a copy of the most recent meeting minutes to each new member to acquaint him/her with the function and focus of the group. The new member should be encouraged to develop a rapport with other members to effectively work with fellow members to maximize productivity.

The chair of the Board of Directors/Board of Governors, Council, Committee or chapter shall have the following responsibilities:

1. Assign a mentor to each incoming new member of the group prior to the first meeting.
2. Ensure that the time allotted at the beginning of the first meeting is sufficient for proper introduction of the new member by the assigned mentor.
3. Assess at a later meeting the effectiveness of the mentor/new member relationship.
4. Provide any assistance to enhance the mentor/new member relationship.

Completion date: The relationship terminates at the end of the new member's first year in the group.

XXII. Example of Staff Publications Committee Tickler File

1. Eight weeks prior to Annual Meeting, send an information packet to new Publications Committee members consisting of:
 - Publications Committee rosters (current and upcoming)
 - Publications Committee BARs
 - Publications Committee MOP
 - Minutes of four previous meetings
 - Agenda for upcoming meeting
 - Hotel & meeting reservation forms
 - Publishing and Education Council roster
 - Communications and Publishing staff organization chart complete with names
 - Time and location of orientation meeting
 - Peer review process
 - Article review forms
 - Instructions to authors
 - Upcoming year TC liaison assignment list
 - ASHRAE guidelines for presentation of motions
 - 100 sheets of ASHRAE stationery

2. Three weeks prior to Annual and Winter Meetings, send to each Publications Committee member:
 - Meeting agenda
 - Prepared materials and action items
 - New or proposed editorial calendar
 - Roster (if changed)
 - Information handouts for the Monday morning TCFTG Section Chairmen 7:00 a.m. breakfasts

3. Within four weeks following a Publications Committee meeting, send meeting minutes to Publications Committee members.

XXIII: The Wired Writer

How to Submit Manuscripts Electronically

CREATING GRAPHICS

- Save all graphics as stand-alone files.
- Save all graphics as TIF, WMF, XLS (MS Excel), or EPS files. (EPS files must be saved with a TIF preview attached. TIF and EPS files should be created at 300 dpi or greater.)
- Do not insert graphics in the text. Graphics in Word files cannot be used.
- Use 1 point or thicker (0.35 mm or 0.014 inch) lines in figures.
- Photos may be submitted as TIF or EPS files, or as slides, transparencies or glossy prints.

CREATING TABLES AND CHARTS

- **Do not use shading.**
- Use patterns to distinguish sections of charts.
- If using MS Word, use the Insert Table function from the toolbar to create tables.
- If not using MS Word, separate columns using tabs.

CREATING TEXT

- Create text in Microsoft Word or save file as text (.txt).
- Save text in one file only.
- Provide all text in single-column format.
- Use hard returns only at the end of paragraphs (not at the end of every line).
- Do not use manual hyphenation.

SUBMITTING FILES

Our preference is to receive files via e-mail. The maximum size of the e-mail is 8 MB.

Large graphic files may be placed on our FTP site at xp.ashrae.org; login: journal; password: article.

Files sent via mail should be submitted on PC-compatible CD-ROM or 3.5 in. PC-compatible disk. Also, send a printout of all files.

FOR MORE INFORMATION

If you have questions regarding your submission, please contact these editors.

Fred Turner, Editor

Phone: (404) 636-8400, ext. 1210

E-mail: fturner@ashrae.org

Sarah Foster, Managing Editor

Phone: (404) 636-8400, ext. 1148

E-mail: sfoster@ashrae.org

Greg Martin, Associate Editor

Phone: (404) 636-8400, ext. 1174

E-mail: gmartin@ashrae.org

Rebecca Norris, Assistant Editor

Phone: (404) 636-8400, ext. 1185

E-mail: rnorris@ashrae.org

XXIV 2005 Editorial Calendar

ASHRAE® JOURNAL

The magazine of the American Society of Heating, Refrigerating and Air-Conditioning Engineers, Inc.

ASHRAE Journal

ASHRAE Journal publishes application-oriented articles and is considered a preeminent source of HVAC&R information.

Actions Required of TCs for ASHRAE Journal

- Suggest article topics to Journal editor, and
- Provide articles on technical topics that appeal to broad portions of ASHRAE's membership.

ASHRAE Journal Specifications

- ASHRAE Journal describes current HVAC&R technology of broad interest through the publication of application-oriented articles. Its content ranges from back to basics features to reviews of emerging technologies, covering the entire spectrum of HVAC&R application interest.
- Manuscripts should be 2,000 to 3,000 words in length, with a suggested maximum of four illustrations (figures, tables or photographs). Manuscripts must be written to appeal to broad readership.
- Informal abstracts and suggestions can be sent to Fred Turner at fturner@ashrae.org.

ASHRAE Insights

ASHRAE Insights communicates news of Society activity, including news of members, chapters, regions, Society committees and International Associates. Insights needs news items regarding the work of your TC.

Actions Required of TCs for ASHRAE Insights

- Send TC news items to Jodi Dunlop at jdunlop@ashrae.org.

ASHRAE Insights Specifications

- ASHRAE Insights publishes articles describing activities that have a large overall influence such as discussing expected results of new or completed research, how a revision to a ASHRAE Handbook chapter will change or advance current practice, or how meeting programs address current issues.
- Color and b/w photos accepted.
- Photo and copy deadlines are the first of the month prior to the month of publication.
- Send photos and news items as e-mail attachments to Jodi Dunlop at jdunlop@ashrae.org.

XXVI. Guidelines for Awards

The following guidelines for ASHRAE awards are approved: (99-01-27-51/06-01-25-08/07-03-25-01)

- All requests or suggestions for new awards, revisions to current awards, or award deletions shall be forwarded to the Honors and Awards Committee for review and recommendation before being forwarded to Members Council and the BOD for review and approval.
- ASHRAE awards are grouped into the following categories, each of which has its defined form of award:
 1. Personal Honors (plaque and medallion)
 2. Personal Awards for General Society Activities (plaque and lapel pin)
 3. Personal Awards for Specific Society Activities (plaque and lapel pin)
 4. Paper Awards (plaque and honorarium)
 5. Society Awards to Groups or Chapters (plaque)
- Awards will normally carry the name of an ASHRAE activity (e.g., Distinguished Service Award, Fellow, Journal Paper Award). No business, product or other commercial name shall be used for an award. Only in very exceptional instances may consideration be given to naming the award after an individual.
- Each proposed award shall be submitted to the Honors and Awards Committee with a detailed description including the name of the award, the suggested category for the award, the reason for establishing the award, and the proposed selection and awarding process.
- Initial total funding for the award shall be described in the proposal, along with provisions for future funding and inflation considerations. Funding shall be self-perpetuating and supporting for the expected life of the award.
- Proliferation of awards that would tend to detract from the worth of existing awards must be avoided. The award must first be considered as applying to an important field of ASHRAE related activity; the name of the award would then add prestige.
- Awards may be proposed by any committee, chapter, or individual to the immediate authority but eventually must pass through the Honors and Award Committee for approval prior to submission to Members Council and then to the Board of Directors. The Honors and Awards Committee will assist anyone wishing to submit a proposal for a new award. The proposal should be reviewed early in the process to allow determination for the appropriate nature of the anticipated award and meeting all necessary criteria for acceptance.

This committee shall include in their supporting material for candidates only information pertinent to the requirements for the particular award for which the candidate is being recommended. (70-07-01-11)

All voting for honors and awards of the Society shall be strictly secret and held at meetings of the Board of Directors and Members Council (not by mail ballot), and that the H&A Committee be instructed to place the necessary information for such voting before the BOD at least two months prior to the applicable meeting. (65-01-28-19/06-01-25/26-8.16)

It is the policy of the Society not to consider for approval any Society honors or awards posthumously, other than the Hall of Fame.

XXVII. Commercialism Policy

ASHRAE Commercialism Policy and Guidelines

ASHRAE Commercialism Policy Statement

ASHRAE is a technical society whose objective is to advance the arts and sciences of HVAC&R. The Society is not organized to advance commercial interests. ASHRAE's restriction of membership to individuals reflects the Society's non-commercial character. With the foregoing in mind, ASHRAE's Commercialism Policy is as follows:

ASHRAE's publications and activities shall be free of commercial bias and shall not imply ASHRAE endorsement of any commercial interest. Commercial recognition may be provided or implied when doing so is necessary to promote the arts and sciences of HVAC&R and the understanding of associated technology. Such opportunities for recognition shall be administered fairly and may include citations, sponsorships, advertising and acknowledgements.

ASHRAE Commercialism Guidelines

To disseminate knowledge and fulfill its objective, ASHRAE publishes literature; conducts educational programs, conducts technical meetings, and makes available data in electronic form. These publications and activities may include commercial recognition to promote understanding of technical content and awareness of available technology. Such recognition, however, must not imply ASHRAE endorsement of a product or service, nor may the focus of any ASHRAE work or activity be to promote a commercial product or service, whether in the public or private sector.

Responsibility for implementing ASHRAE's Commercialism Policy resides with the Society's councils and committees. These groups should draw upon their unique understanding of their assigned activities to establish operating procedures and make decisions that are consistent with the Society's policy. These Commercialism Guidelines are intended to be of assistance when applying the Commercialism Policy and making commercialism judgments that are fair, are beneficial to the membership, and protect the integrity of ASHRAE publications and activities. They apply to all levels of ASHRAE activity – Society, regional and chapter – and address ASHRAE recognition of all external groups – public and private; for profit and not for profit; commercial and non-commercial..

ASHRAE's Commercialism Guidelines consist of two sections.

The Guiding Principles section sets forth the basic criteria that each instance of commercial recognition must meet.

The Examples of Policy Intent provide specific guidance as to what the Society has already determined to be acceptable and unacceptable instances of commercial recognition. These Examples of Policy Intent are not a complete list of policy applications, nor are they intended to cover the full intent of the policy. They provide guidance.

*When deciding on approval of activities that include commercial recognition, **councils and committees must determine if the intent of the Commercialism Policy Statement is met and if the criteria identified as Guiding Principles are satisfied.** If so, it is the responsibility of councils and committees to revise their respective manuals of procedures as needed.*

Guiding Principles

ASHRAE use of commercial names and logos shall not be done in ways that imply ASHRAE endorsement, approval or certification.

If ASHRAE publications and activities are sponsored by commercial entities or other external groups, the opportunities for sponsorship shall be widely available and fairly administered.

The intent of any ASHRAE presentation or paper shall be to educate the ASHRAE audience about research or technological application, not to advertise nor promote commercial entities or other external groups.

The inclusion of commercial information shall be done in a fair and unbiased way so as to avoid explicit promotion of a product or commercial entity.

Commercial names and logos not related to the HVAC&R industry shall be permitted in presentations and papers providing recognition is pertinent to a better understanding of HVAC&R technology, such inclusion is not intended to be promotional, ASHRAE endorsement is not conveyed, and there is no implication that the audience is required to use the commercial entity.

Some ASHRAE activities, such as ASHRAE participation in the AHR Exposition, ASHRAE Journal and the Society web site, are recognized as operating as commercial enterprises, fulfilling the Society's mission of technological advancement with adherence to business plans that generate income to offset operational expenses.

Chapter and regional activities shall not compete with the Society's activities in the areas of advertising and sponsorships since chapter and regional activities detrimental to the Society are detrimental to the Society's membership.

Chapters participating in local or regional trade shows shall adhere to guidelines included in the Manual of Chapter Operation so as to not be in conflict with the Society's contractual agreement for sponsorship of the AHR Exposition.

Examples of Policy Intent: Acceptable Applications

Society annual and winter meeting events may be sponsored, such as welcome party, luncheons, registration kits and receptions.

Commercial names and logos may be used to acknowledge sponsorships, such as on event banners, chapter tabletop displays, newsletters, rosters and websites.

ASHRAE technical literature and educational materials may be sponsored.

Commercial names and logos may be used in presentations and papers to provide author identification or to acknowledge contributions.

Company names and products may be cited in historical works. (ROB 100-004-003)

Company names and products may be cited in presentations and papers if such information has historical significance directly relating to the technology discussed in a presentation or paper.

Manufacturer and model number of test instruments may be noted if such identification is required to allow accurate reproduction of the work described.

Commercial names not directly related to the HVAC&R industry may be displayed or cited in presentations and papers if inclusion of such reference is pertinent to a better understanding of the subject matter discussed or if such reference is unavoidable.

Presentations may include logos and the names of computer hardware, operating systems, browsers, word processing programs, spreadsheets, presentation programs, etc., since the intent of the presentation is to examine HVAC&R technology, not to promote information management technology.

Demonstrations of software used in the HVAC&R industry may include reference to commercial products and may include performance data if the inclusion of such references and data are necessary to illustrate use of the software.

Chapters may allow advertising and sponsorships on their web sites providing that the advertisers and sponsors deal primarily in the chapter's local geographic area, such as a local sales office of a manufacturer, local manufacturer, or local distributor.

Advertising on chapter web sites must be in a separate section of the web site and must comply with all requirements of the ASHRAE Policy for Chapter Websites.

Chapters and regions may have web links to non-ASHRAE web sites if the purpose is informational and if it is made clear to viewers that they are leaving the chapter website.

Web-based presentations may include excursions to commercial sites if the purpose is clearly not to promote a commercial entity.

Chapters may include advertising in chapter newsletters and publications if it is restricted to business card type advertising as described the Manual of Chapter Operation.

ASHRAE technical literature and educational materials may be sponsored if the content of the material remains bias free, if equal opportunities are provided to commercial interests, and if such recognition is made public.

Examples of Policy Intent: Unacceptable Applications

The title or the text of papers and presentations may not promote a commercial product or service.

The use of commercial names may not be done in ways that promote the benefits of that commercial entity nor be used to principally further awareness of that commercial entity.

The subject of presentations and papers may not be to promote a commercial entity's exclusively available commercial product and service.

Commercial part numbers may not be used in a presentation's or paper's title, text or illustrations unless such information is necessary for advancing technical knowledge.

Product-specific programs (programs whose main intent is to describe the features of a specific manufacturer's product) may not be scheduled because their very nature would be to further awareness of a specific commercial entity or to describe the advantages of the commercial entity.

Chapter and regional web sites may not state by name products, services and companies, except in advertising, in sponsorships or to identify the business affiliations of persons named on the site.

5/22/2002