



MANUAL FOR STUDENT BRANCH OPERATIONS

Revised Sept 2020

INTRODUCTION

The procedures have been written to assist ASHRAE student branches in planning, organizing, and improving the operation of their student branch. It is intended to serve as a guide and with certain exceptions, such as directives based on society rules, the student branches should feel free to amplify and modify the suggestions to suit their various needs.

Student Branch officers should keep in mind that there is no better way to assure the success of a branch than to have each member feel a definite sense of purpose. To accomplish this, participation is important and insofar as practical, every person is needed to contribute to the success of the branch.

Cooperation and communication between the students, advisor, sponsoring chapter, and Society headquarters is vital to the overall effectiveness of the branch. The local chapter Student Activities Chair and Student Branch Advisor (SBA) are the agents who channel information between the sponsoring chapter, branch members, and Society. It is important that the student branch maintain effective communication through its local, sponsoring chapter. The Regional Vice Chair for Student Activities can help to channel information between chapters, regions, and Society Headquarters.

The Society is governed by the following documents, in the order listed:

1. The Certificate of Incorporation
2. The Society Bylaws
3. Rules of the Board
4. Chapter Bylaws
5. Student Branch Constitution
6. Student Branch Bylaws

This manual is solely for the use of current student branch officers and is to be passed along at the end of their tenure to an incoming officer.

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PROCEDURES FOR STUDENT BRANCH OPERATIONS

DUTIES OF STUDENT BRANCH OFFICERS

President

The branch president is responsible for the organization and successful operation of the student branch. The President should consult regularly with the advisor and/or local chapter officers or advisory committee. A copy of "Robert's Rules of Order, Revised" and a gavel will prove helpful in conducting meetings.

Committees should then be established and students appointed to each. If possible, every member of the student branch should have an opportunity to serve on a committee, present a paper, or prepare a discussion during the year.

Possible committees are: future meetings, publicity, membership, field trips, socials, ways and means, newsletter, etc.

Vice President

The student branch vice president is responsible for maintaining the records of the student branch, for the completeness and accuracy of applications, for changes of address, and the transmittal of this material to Society Headquarters, with copies when required to the Regional Vice Chair for Student Activities and the sponsoring chapter or advisory committee. The vice president may also be responsible for planning programs at each branch meeting.

The vice president shall:

Assist the advisor in processing applications by checking applications for completeness, legibility and accuracy.

Make sure that all changes of address of student members are forwarded to Society Headquarters and to the local secretary of the sponsoring chapter.

Treasurer/Secretary

The student branch treasurer/secretary is responsible for maintaining the accounts of the student branch. It is recommended that some amount of money be charged to all student members for local operating funds. The treasurer/secretary shall also consult with the local chapter or the advisory committee for possible financial aid. The amount of possible financial will be determined by the local chapter Board of Governors or the advisory committee.

Prior to the end of the spring school term each year, the student treasurer/secretary will submit a financial report (Appendix B) signed by the student branch advisor, to Society Headquarters with copies to the sponsoring chapter or advisory committee, retaining a copy in the student branch files. This should be submitted no later than May 31 annually.

The treasurer/secretary shall send reports on student branch meetings to Society Headquarters with a copy to the sponsoring chapter or advisory committee.

DUTIES OF THE STUDENT BRANCH ADVISOR

The Student Branch Advisor should:

Encourage students interested in heating, refrigeration, and air conditioning to become student members as the initial step in their program of professional development:

Make certain that the activities and programs of the student branch stimulate interest in the profession; and

Create a professional awareness which will inspire the students throughout their career to maintain a continuous and active membership in ASHRAE.

Throughout the year, the Student Branch Advisor, with the assistance of the student branch, will review student member applications. Payment of student dues can be sent directly to Society Headquarters along with the application forms. Student membership applications are available from ASHRAE Headquarters or from the Regional Vice Chair for Student Activities or local Chapter Membership or Student Activities Chair. Students can also join online at <https://join.ashrae.org/>

In addition, the Student Branch Advisor will perform the following duties although the timeline may change based on your school's academic calendar:

September: Call the first meeting of the student branch and set up the election of officers.

October: Encourage student members to begin preparation for presentations at the local chapter's student night and encourage student members to prepare papers for presentation at student branch meetings. Remind students of any deadlines of Society or chapter awards/competitions/grants/etc.

May: The Annual Student Branch Report needs to be completed and submitted to Headquarters no later than May 31 annually. This is filed electronically via <http://studentbranchreport.ashrae.org/StudentBranch/StudentBranchReport>

Mailings - During the school term the advisor will receive a number of emails from Headquarters containing information of interest to students (i.e., information on and deadlines for applying for grants, design competition, internships, etc.). It is the advisor's responsibility to pass this information along to the students.

Consignment - An instructor can receive copies of the ASHRAE Fundamentals Handbook on consignment for distribution to new ASHRAE student members. For further information, contact ASHRAE Customer Service at 1-800-527-4723 (U.S. and Canada) or 404-636-8400 (Worldwide).

MEETINGS

A successful branch will conduct its meeting on a specific schedule, place, and format. It is the obligation of the officers and their committees in charge to make the meetings interesting and instructive. All attendees should feel welcome and "at home."

The number of meetings scheduled may vary, but at least seven regular meeting are recommended. The meetings should be set so as to be scheduled on regular intervals (e.g., the 3rd Tuesday of each month). To help the meeting run smoothly, have a planned agenda and time limit.

Certain activities must be accomplished. Finances, future officers chosen at an appropriate time, membership, etc. are necessary matters.

"Robert's Rules of Order" (Revised) is recommended as the prevailing procedure for conducting meetings.

The ASHRAE Code of Ethics Commitment should be included on all agendas and read before all student branch meetings: *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.*

A. Opening Rally

1. Arrange to invite all interested students to the opening meeting. This normally occurs at opening meeting. This normally occurs at the first meeting in September.
2. Speakers such as the Student Branch Advisor, the Chapter Student Activities Chair, someone from the advisory committee, or the president of the local chapter can stress the value of the student branch to the individual student and can relate the activities and accomplishments of the Society.

B. Program Hints

1. It is best to plan programs at the beginning of each year. This could be a duty for the Vice President.
2. Student and faculty can serve as speakers, as can representatives from industry, another educational institution, or government.
3. Within the Society there is a great diversity of interest, as represented by the many technical committees. Plan student programs so that these diverse activities may be emphasized in order that each student member may obtain a perspective of the diverse possibilities a career in the HVAC&R field has to offer.
4. The local, sponsoring chapter is an excellent source for obtaining quality program speakers.
5. In order to give several students an opportunity to participate, a meeting may well be conducted as a symposium. Each student could give a brief talk with time for discussion.

6. A group of two to five students could be in charge of arranging each meeting. The President of the student branch should open and close the meeting, conduct the brief business period arranged for every meeting, then turn the meeting over to the chair for that particular program at the appropriate time.
7. In planning technical meetings, an effort should be made to obtain a good film on the selected subject or to plan a visit during the same day or week to a plant in the vicinity where the process to be discussed may be seen. Most manufacturers of engineering apparatus will supply film or exhibits of equipment without charge, and occasionally will send a competent lecturer as well.
8. The Society also has a speaker's list, which may be of help. The list is compiled of speakers from the previous two years' annual and winter meetings. By reviewing the list you may find speakers from your geographical area that would be interested in speaking to the student branch. The speaker's list can be obtained from Society Headquarters.
9. In addition to regular technical meetings, it would be advisable to plan:
 - a. A "Get Together Night," including a brief address on a subject of general interest and possibly some form of entertainment and refreshments.
 - b. An "ASHRAE Student Night" - joint meeting with the sponsoring chapter.
 - c. The "Student Branch Annual Meeting" - possibly including dinner, and address by a prominent speaker and some entertainment.
 - d. An "Inspection Trip" possibly in cooperation with another ASHRAE Student Branch in the area and the sponsoring ASHRAE chapter(s) or the branch of another engineering society in the same school.
10. Consider having a table top product display by local vendors.
11. Also available through Society is the Distinguished Lecturers (DL) Program. The purpose of the program is to provide ASHRAE Chapters with lecturers equipped to speak on relevant subjects of interest to ASHRAE members and guests without incurring huge costs. The Distinguished Lecturer Program is supervised by the Chapter Technology Transfer Committee. A complete listing of Distinguished Lecturers by name and chapter is available at <https://www.ashrae.org/communities/chapters/distinguished-lecturers>

C. Conducting a Meeting

1. The value of a technical meeting lies in the opportunity it offers for the interchange of experience and information.

For a technical session to be of greatest value, the following are essential:

 - a. A good speaker
 - b. Adequate discussion
 - c. A good presiding officer
 - d. Adequate meeting room and suitable equipment
2. The preparation of an interesting paper on a technical subject requires thorough study by the author. An author should not read the paper, but should refer to notes, then speak

forcefully. If the presenter has the attention of those on the back row, then the presenter can be assured that all of the audience can hear.

Sample Meeting Agenda

1. Call to Order and ASHRAE Code of Ethics
2. Introduction of guests and members
3. Roll call
4. Minutes of previous meeting
5. Committee reports
6. Old business
7. New business
8. Announcements
9. Program:
 - a. Introduction of speaker
 - b. Technical presentation
 - c. Discussion
 - d. Announcement of plans for next meeting
10. Adjournment

E. Finances

1. Dues - Students often pay some dues to the branch to cover incidental costs, refreshments, equipment rental, etc. To control expenditures and to set dues or requests from the branch for expenditures, the branch should prepare an annual budget.
2. Bank Account - An account in the name of the student branch should be maintained if funds are raised or dues collected. Due to the transient nature of the members, this account should be at a local (campus) facility and have at least three authorized signatures, requiring two signatures for withdrawals. Possibly the Student Branch Advisor should serve as a co-signer.

F. Records and Reports

1. Student Branch Status Report - To keep our records current, an annual Student Branch Report is requested by Society. Each student branch will be notified in early spring to complete the report. The report also serves as a means of obtaining information of interest to other branches. The report can be filed electronically at <http://studentbranchreport.ashrae.org/StudentBranch/StudentBranchReport> and is due with no later than May 31 annually.
2. Financial Reporting – The student branch treasurer should monitor the branch finances and submit any relevant fundraising efforts as part of the annual branch status report.

MAINTAINING AN ACTIVE STUDENT BRANCH

To maintain a high activity level in student branches, thus keeping students interested and enthusiastic about the HVAC&R industry, the following definition of an active student branch has been developed.

Criteria for an Active Student Branch

1. Student Branch Advisor required
2. Student officers must be elected annually and all positions must be filled
3. At least five ASHRAE student members
4. The annual branch report must be submitted by May 31st
5. At least 2 activities* must be scheduled for the fall semester
6. At least 2 activities* must be scheduled for the spring semester

An activity is defined as an organized event, such as a tour, a field trip, a presentation by guest speakers, a fund-raiser, etc. Regularly scheduled organizational meetings are not included.

If a branch fails to meet the criteria for active status, it will be put on a "warning status" for one year. Society will notify the Student Branch Advisor, the sponsoring chapter's Student Activities Chair, and the Regional Vice Chair for Student Activities.

If the branch does not meet the criteria for a second year, the Student Branch Advisor will lose the \$25.00 student branch advisor dues privilege and the branch will be considered inactive. Society will notify the Student Branch Advisor, the sponsoring chapter's Student Activities Chair, and the Regional Vice Chair for Student Activities.

A student branch can be reactivated if there is an advisor in place and at least five student members participating in branch activities. The advisor should contact Society to get the branch status updated.

PROCEDURE TO CHANGE A BRANCH'S NAME

If a student branch's advisor and students wish to change the branch's name, the Student Branch Advisor should notify in writing both the local ASHRAE chapter and the ASHRAE Assistant Manager of Student Activities at Society Headquarters. The email should include the branch's original name, the new name, and the reason for the change.

GUIDELINES FOR ESTABLISHING A JOINT STUDENT BRANCH

Recognizing the need to recruit new industry members from universities, virtually every professional society is competing for essentially the same pool of students. It is our position that more can be gained from joining hands to solve a problem than can be achieved by competing amongst ourselves over a scarce resource. Accordingly, we are recommending that local ASHRAE chapters consider, when appropriate, a partnering relationship with other professional and trade organizations to jointly sponsor a student branch.

Partnering Organizations:

The goal of any ASHRAE student branch is "to get more students interested, concerned, and involved in pursuing a career in the field of heating, ventilating, refrigeration, and air-conditioning". Therefore, any professional or trade organization that would lead students towards the same goal is a likely candidate as a co-sponsor. Some perspective partners would include:

- Mechanical Contractors Association of America (MCAA)
- Sheet Metal and Air-Conditioning Contractors National Association (SMACNA)
- Plumbing, Heating and Cooling Contractors of America (PHCC)
- American Society of Mechanical Engineers (ASME)
- National Society of Professional Engineers (NSPE)
- National Electrical Contractors Association (NECA)

The partnership will, of course, depend on which organizations exist in the chapter's geographical location and the desire and strength of that local organization to support a student branch. Many organizations will not have the same 'traditional' resources to support a student branch, but will still be able to provide alternative types of resources, such as tours, internships, and other similar benefits. Irrespective of which organizations are selected to co-sponsor a student branch, this partnership should be viewed as a long-term commitment.