

BEFORE WE START – DISCUSS AT YOUR TABLE

- YOUR NAME
- YOUR CHAPTER
- CURRENT AND PREVIOUS ROLL IN ASHRAE

MEMBERSHIP
PROMOTION
VIRTUAL
CENTRALIZED
TRAINING

September 18, 2026
Session 1



TODAY'S OBJECTIVES

- **WHAT DOES THE MP CHAIR DO?**
- ASHRAE ORGANIZATION
- MEMBERSHIP GRADES
- RUNNING MP REPORTS
- MP PAOE & AWARDS
- RECRUITMENT
- RETENTION
- PLANNING FOR SUCCESS / BEST PRACTICES

ASHRAE VALUE STATEMENT

In 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 shall avoid all real or perceived conflicts of interest. Our culture is one of inclusiveness, acknowledging the inherent value and dignity of each individual. We celebrate diverse and inclusive communities, understanding that doing so fuels better, more creative and more thoughtful ideas, solutions and strategies for the Society and the communities our Society serves. We respect and welcome all.

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

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

Diversity Statement - <https://www.ashrae.org/about/diversity-equity-and-inclusion-dei>

TEAMWORK & COMPETITION

We will be breaking into teams
throughout the day for quizzes and role
playing

Get to know your team! Shares ideas,
stories, and successes.

Have fun!

WHAT DOES IT MEAN TO BE A MEMBERSHIP PROMOTION CHAIR?

- **RECRUITMENT**

- Attract new Chapter members

- **RETENTION**

- Keep existing members engaged and prevent cancellations

- **YOUR Ultimate Goal**

Members (End of Year) > Members (Start of year)

WHAT DOES THE MP CHAIR DO?

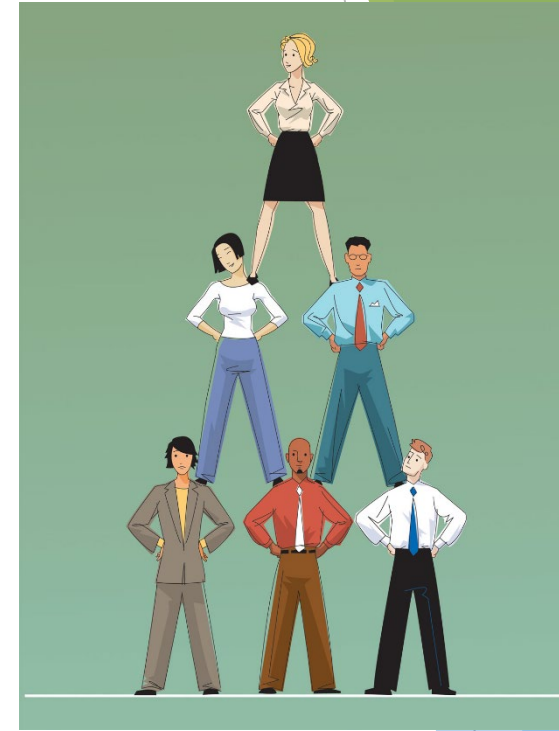
Form a Committee!!!

Attend Training:

- Centralized Training (Annual Conference)
OR
Virtual Centralized Training

AND.....

- Chapters Regional Conference (CRC) Workshop
- Transportation Costs:
 - Centralized Training – Paid by Society
 - CRC – Paid by your Chapter



**FORM A
COMMITTEE!**

WHAT DOES THE MP CHAIR DO?

Prepare your Management By Objectives (MBO)

- Strategize goals with your MP Committee, Chapter President, or BOG
- Focus on Recruitment and Retention
- Set goals with your RVC (by October 1st)
- What is an RVC?

Recruitment

Attract New Members

- Diversity your local membership:
 - Review current member roster and look for opportunities to diversify
- Organize MP events
- Collaborate with Student Activities (SA) & Young Engineers in ASHRAE (YEA)

WHAT DOES THE MP CHAIR DO?

Retention

Get to Know YOUR Members!!

- Attend Chapter meetings
- Talk to your Members
- Make them feel welcome

Recognize YOUR Members

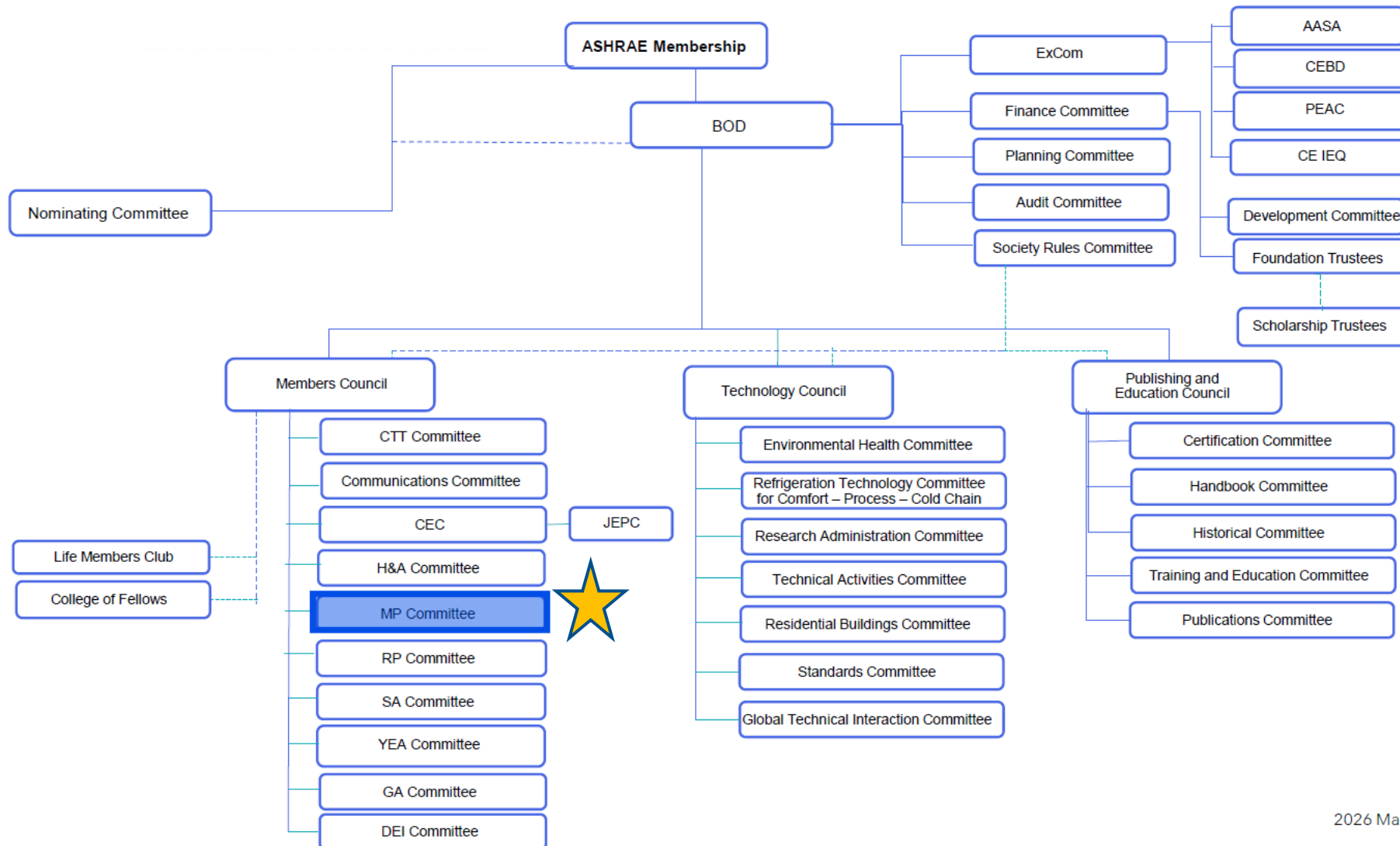
- New Members:
 - Invite & Introduce at Chapter Meetings
 - Newsletters
 - Social Media

Manage Delinquent Members

ASHRAE ORGANIZATION



SOCIETY ORGANIZATION



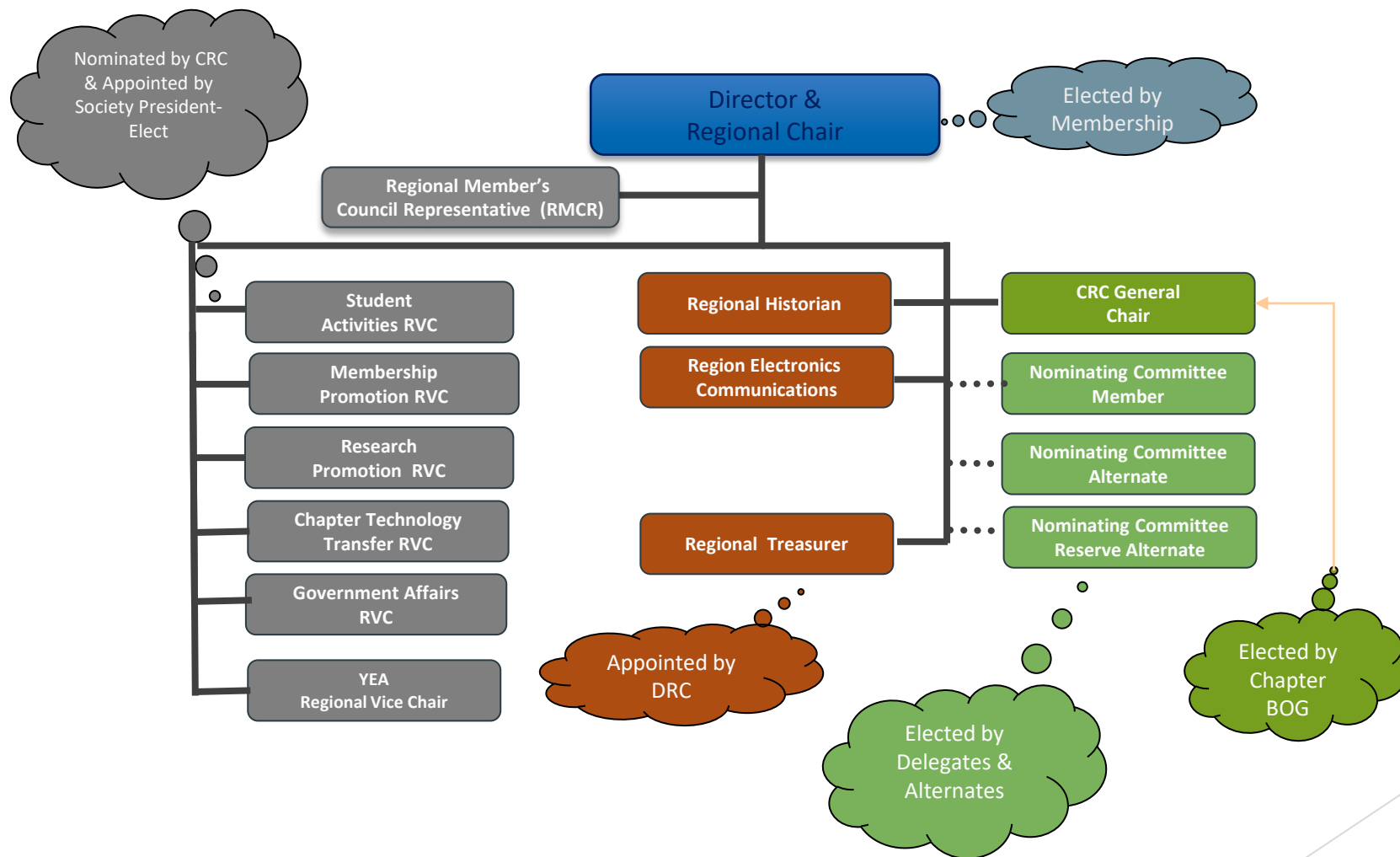
ASHRAE REGIONS

16 ASHRAE Regions Throughout the World

- Regions 1-12: US/Canada/Central & South America
- Region 13: Southeast Asia
- Region 14: Europe
- Region 15: India
- Region-at-Large: Africa & Middle East

Regions are comprised of 7 – 23 Chapters each

REGIONAL ORGANIZATION



2026-27 EXECUTIVE COMMITTEE



President
Sarah Maston



President Elect
Ashish Rakheja



Treasurer
Wade Conlan



Executive Vice President
Jeff Littleton

2026-27 MP COMMITTEE



Chair
Rob Druga
Region III



1st Vice Chair
Akshay Bhargava
Region V



2nd Vice Chair
Christine Smith
Region III

MP REGIONAL VICE CHAIRS



Region VII
Lionel Davis



Region VIII
Lorenzo Gonzalez



Region IX
Megan Gibbs



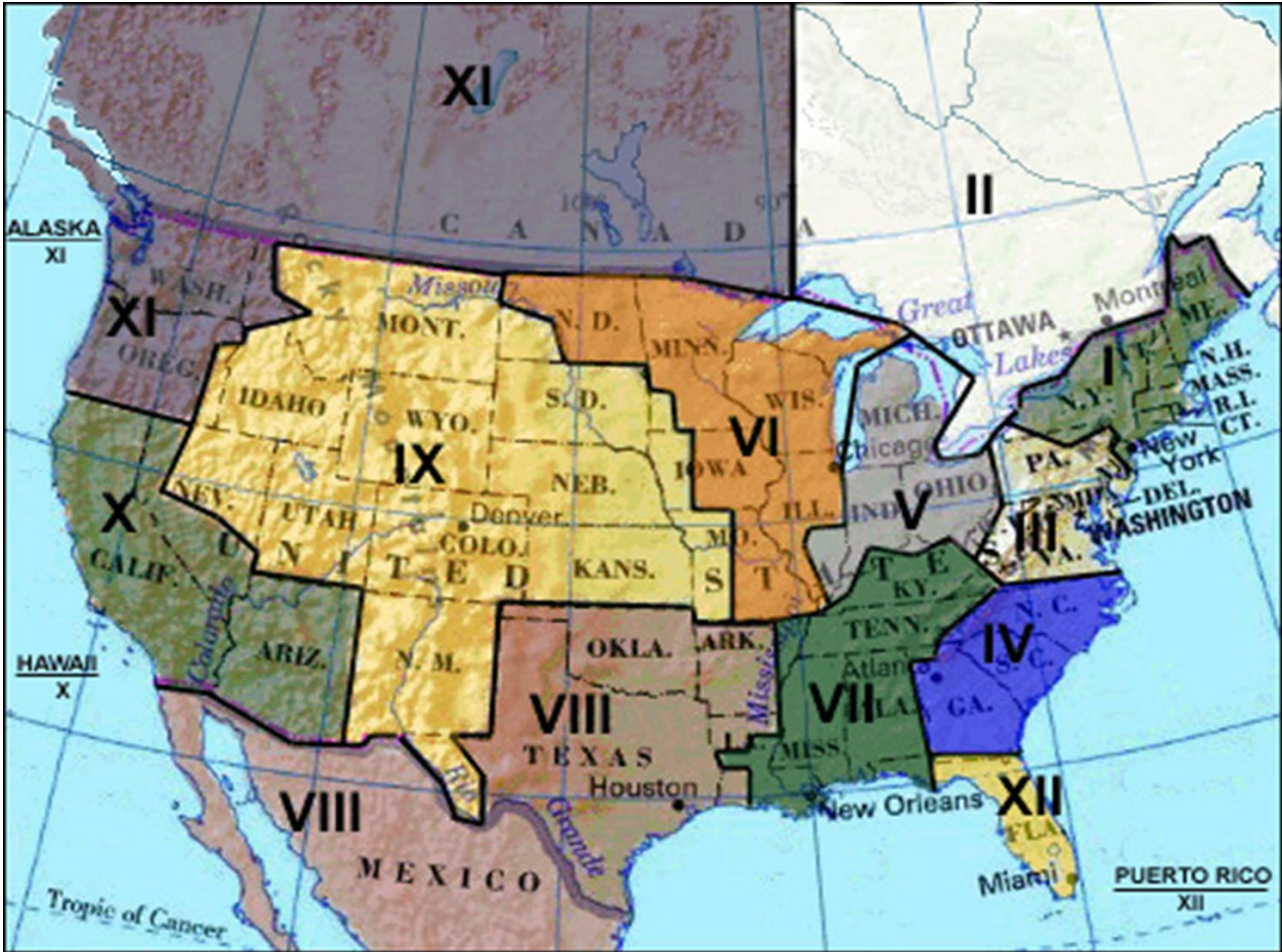
Region X
Larry Hodgins



Region XI
Mark Henry



Region XII
Ruben Abreu



Region I
Andrew Dubel



Region II
Badri Patel



Region III
James R Pensyl



Region IV
Darrell Sandlin

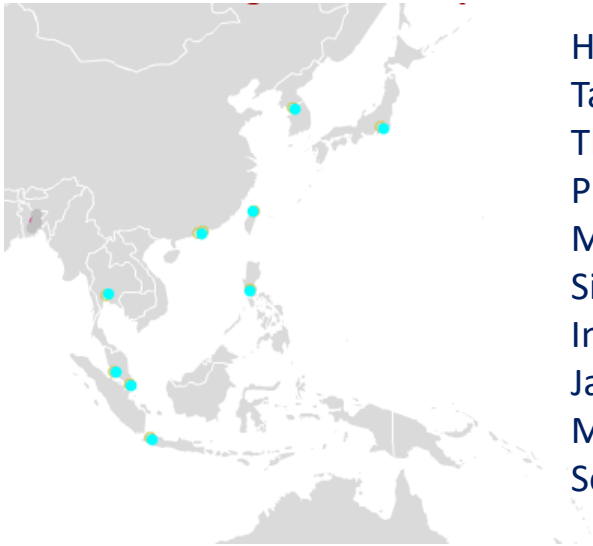


Region V
Brad White



Region VI
Jason Leffingwell

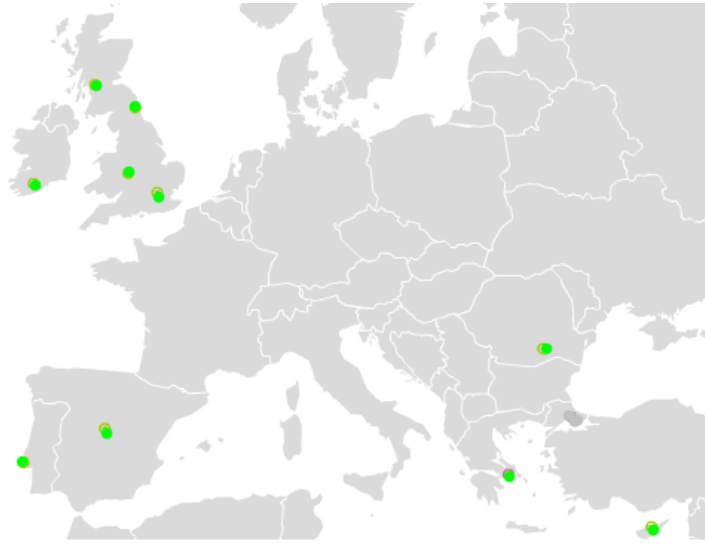
MP REGIONAL VICE CHAIRS



Hong Kong
Taiwan
Thailand
Philippines
Malaysia
Singapore
Indonesia
Japan
Macao
South Korea



Region XIII
Dennis Tung



Cyprus
Ireland
Hellenic
Israel
Portugal
Romania
ASHRAE UK



Region XIV
Adelio Gaspar

MP REGIONAL VICE CHAIR



Region XV
Manan Vora

Region XV:

India

- Western India
- Mumbai
- Deccan
- Chennai
- Bangalore
- East India
- Rajasthan
- Chandigarh
- Pune

MP REGIONAL VICE CHAIR



Region At Large:

Bahrain

Bangladesh

Egypt

- Cairo
- Pyramids
- Alexandria

Jordan

Kuwait

Lebanon

Libya

Nigeria

Oman

Pakistan

- Northern Pakistan
- Pakistan
- Faisalabad
- Central Pakistan

Qatar

Saudi Arabia

South Africa

Sri Lanka

Sudan

Turkey

UAE

- Falcon

Region at Large (RAL)
Maria Morgan



MEMBERSHIP STAFF



Daniel Gurley
Senior Manager,
Membership &
Customer Service
Tel: 678-539-1127
DGurley@ashrae.org



Lisa Nichols
Coordinator,
Member Services
Tel: 678-539-1218
Lnichols@ashrae.org

QUIZ #1

MEMBERSHIP GRADES



MEMBERSHIP GRADES

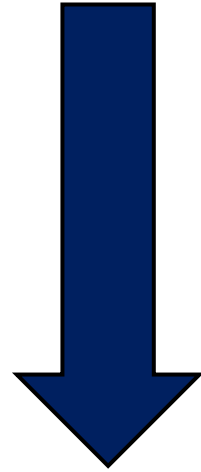
- Student Member
- Affiliate Member
 - Under 30 years old
 - New to ASHRAE
 - Limited to 3 years
- Associate Member
 - Less than 12 approved years
- Full Member
 - 12 Society approved years

- Honorary Member
- Presidential Member
- Fellow Member
- Life Member
- Retired Member

**OUR
FOCUS!**

MEMBERSHIP GRADES

Why understand Membership Grades?



RECRUITMENT
&
ADVANCEMENTS

MEMBER GRADES AND BENEFITS

Benefits	Full Member and Associate		Student and Affiliate	
	Regular (\$290)	Developing Economy (\$175)	Regular (Student \$30) (Affiliate \$75/\$110/\$145)	Developing Economy (Student \$15) (Affiliate \$45/\$65/\$90)
One free Winter or Annual Conference Registration (new member within 24 months)	Yes	No	No	No
ASHRAE Journal (Monthly)	Yes	Digital	Yes	Digital
Select One Annual Benefit: eLearning Course, PDF of Handbook Standard or Guideline, Handbook PDF, Certification Study Guide	Yes	Yes	No	No
Option to select additional Handbook packages at discounted rate	Yes	Yes	Students: Yes Affiliate: No	No
Complimentary first year access to Handbook Online	Yes	Yes	No	No
Member Bookstore discount	Yes	Yes	Yes	Yes
Member access to Technology Portal	Yes	Yes	Yes	Yes
Conference, Bookstore, and education discounts	Yes	Yes	Yes	Yes
Networking at Chapter, Regional, and Society level	Yes	Yes	Yes	Yes
Hold office and vote at Chapter, Regional, and Society Level	Yes	Yes	Students: No Affiliate: Yes for Chapter	Students: No Affiliate: Yes
Participate on committees	Yes	Yes	Yes	Yes
HVAC&R Industry News	Yes	Yes	Yes	Yes
Free online access to Science & Technology for the Built Environment	Yes	Yes	Yes	Yes

FULL MEMBER & ASSOCIATE - BENEFITS

- Annual Member benefit – 5 options to choose



- Can hold office at Chapter, Region & Society Level
- Voting Privileges
- ASHRAE Journal, eSociety, HVAC&R Newsletter
- High Performance Building Magazine
- Discounts on ASHRAE Publications, Society Conference registration & Professional Development Courses
- ASHRAE Technology Portal
- Insurance plans





New, full dues
paying Full
Members and
Associates
receive

\$2,269

in free
ASHRAE
products and
\$100s
more in
discounts.

join.ashrae.org

Value of ASHRAE Membership

Members select one of four as an annual benefit:



One ASHRAE
Standard (PDF)

up to \$200 value



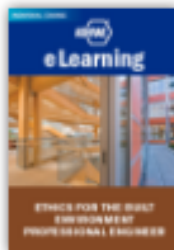
Upcoming
Handbook (PDF)

\$285 value



One Certification
Study Guide

\$74 value



One
eLearning
Course

up to \$60 value



ASHRAE
Journal
Subscription

\$90 value



One Year
of ASHRAE
Handbook
Online

\$315 value



Technology
Portal
Member Access

\$289 value



ASHRAE
Professional
Development

avg \$200 savings



Science and
Technology
for the Built
Environment

\$390 value



One Free
Society
Conference

\$900 avg. value



ASHRAE
Bookstore

25% Off



ASHRAE
Certification

\$200 savings

MEMBERSHIP ADVANCEMENTS

STUDENT → ASSOCIATE MEMBER

SmartStart Program:

- Transfer from Student Member to Associate Member at reduced rates
- Dues:

	Regular	Developing Economies
Year 1	\$30	\$15
Year 2	\$110	\$65
Year 3	\$145	\$90



- Same benefits as Associate Membership
- Promote to graduating Students - Coordinate with SA Chair

www.ashrae.org/smartstart

MEMBERSHIP ADVANCEMENTS

AFFILIATE → ASSOCIATE

- Advancement - Automatic
- May advance early to Associate Member (have to pay the difference in dues)



Increase in benefits

- Request Advancement:
 - Member (or MP Chair) can email Society membership@ashrae.org

MEMBERSHIP ADVANCEMENTS

ASSOCIATE → FULL MEMBER

- Must prove 12-year requirement is met
- Instruct member to update ASHRAE bio in their online profile
- Request Advancement:
 - Member (or MP Chair) can email Society at membership@ashrae.org

RECOGNIZE ADVANCEMENTS AT EVERY MONTHLY MEETING & IN YOUR NEWSLETTER!



WHY ADVANCE TO FULL MEMBER?

- Start accumulating Full Member years
 - Qualify for specific Honors and Awards
 - Qualify for Regional & Society positions
 - Prestige
-
- Why not? → No additional cost



POSITIONS REQUIRING FULL MEMBER GRADE

- Regional Nominating Committee - Min. 5 years
- Regional Vice Chairs (RVC) – Min. 3 years
- Assistant Regional Chair (ARC) – Min. 3 years Region
- Members Council Representative – Min. 3 years
- Director and Regional Chair (DRC) – Min. 5 years
- Any Elected Society-level Position – Min. 5 years

Reasons to Advance to Full Member

- Member interested in holding these positions (now or future)
- Positions require multiple consecutive membership years

OTHER MEMBERSHIP GRADES

Retired Member

- Completely retired
- Member in good standing for 10 years
- At least 55 years of age
- Receive monthly Journals & Insights newsletters
- No Handbook
- Annual dues are \$45.00
- MP Chair feedback:
 - Losing members to due to retirement

Developing Economies Retired Member

- Same requirements as a Retired Member
- Receive monthly digital Journals & Insights newsletters
- No Handbook
- Annual dues are \$25.00

NOTE: Society Staff have to transfer Associate and Full Members to Retiree, cannot be done online.
Just email membership@ashrae.org

QUIZ #2



REPORTS



ACCESS REQUIREMENTS

- The Membership Chair must be listed in the Chapter CIQ to access and run membership reports.
- MP Co-Chairs do not have access to the reports section.
- The Membership Chair as well as the entire Chapter leadership team have access to the PAOE points section.



ALL THE AVAILABLE REPORTS

Chapter Change Detail

All Members: [PDF](#) | [XLS](#) [Students \(PDF\)](#) [Member&Associate \(PDF\)](#) [Summary \(PDF\)](#)

Dues

Paid to Society: [PDF](#) | [XLS](#) [Activity](#) [Delinquency \(XLS\)](#)

New Members

[PDF](#) [XLS](#)

Roster

[PDF](#)

Report (XLS)	Description
YEA Members	Affiliates, Associates and Members who are 35 years of age or younger based on the age demographics they included in their member bio.
Cancellation List	Real-time report: Cancelled in the last 36 months from today. This is for chapters who plan to do a recruitment campaign by contacting previously cancelled members.
Rejoined or Reinstated List for PAOE	This is a PAOE report by checking for previous memberships and report back if someone rejoined or reinstated. Please note that the report includes the data with both of the PAOE prior fiscal year and the current fiscal year.
Chapter Master List	Real-time report outputs member dates in yyyy-mm-dd format. Takes a few minutes to process.*
Non-Member Prospects	Contact to join ASHRAE
Member Status Sheet	Create a Member Status Sheet
Technical Committee Participant by Chapter	Technical Committee Participants by Chapter
Cross-Chapter Communication Report	This tool helps to find cross-chapter communication information more easily and access other chapters social media and get the news from other chapters, learn about the events and other activities from other chapters CIQ_questions@ashrae.org
Chapter Officer Roster	This report lists the chapter positions for the current Society year. CIQ_questions@ashrae.org
Chapter Information Questionnaire	Chapter positions for the future society year. (Ex: If CIQ entered on April 5, the dates are the following society year: 7/1/20XX thru 6/30/20XX): use the current date to run report CIQ_questions@ashrae.org
New & Canceled Detailed	Shows the member # of each person who contributes to the total count of the member dashboard. NEW
Lifetime Membership Status	Notice Of Lifetime Membership Change NEW
Students in Branches	Shows students in the branches in the chapter NEW
Chapter - Branch Mapping	Shows chapter to branch mapping sorted by chapter NEW
Chapter Member Listing with Section	Complete Chapter Member Listing with Section NEW

TOP REPORTS FOR THE MEMBERSHIP CHAIR

- **Chapter Change “Summary” (PDF)**
 - 1 page showing change in number of various membership stats
- **Dues “Delinquency” (XLS)**
 - List of members with past due memberships for 1 – 6 months
- **New Members (XLS)**
 - Details of New Members – You set the date range
- **Member Status Sheet (XLS)**
 - Alphabetized list of members with chapter dues status – Perfect Sign in Sheet for Chapter Meetings!
- **Chapter Master List (XLS)**
 - Provides all the details for every member in your Chapter

RUNNING REPORTS

How do I run chapter reports online?



Resources and Video Tutorials available at: www.ashrae.org/mpchair

Questions? Ask your RVC for help!

Or Contact members@ashrae.org

DEMONSTRATION

QUESTIONS?



PAOE AND AWARDS

PRESIDENTIAL AWARD OF EXCELLENCE

Presidential Award of Excellence (PAOE) is a system established to assist effective chapter leadership and performance.

- Sets minimum standards/expectations to help drive success
- Supports the Presidential Theme
- Drives friendly competition between chapters
- PAOE points update every year in July in the “Presidential Newsletter”



PRESIDENTIAL AWARD OF EXCELLENCE

- Points should be entered throughout the year, as applicable
- Use the PAOE points as a guideline for chapter success
- Some points are assigned by the RVC. Work with your RVC to ensure that you earn these points
- Some points are automatically assigned electronically
- Be honest!

MINIMUM – 800 POINTS

PAR – 1,400 POINTS

MAXIMUM – No Max!

PRESIDENTIAL AWARD OF EXCELLENCE

MEMBERSHIP PROMOTION CATEGORY 2026-27 PAOE

MINIMUM: 800 POINTS		PAR: 1400 POINTS
<i>*All end of the year reports are run on July 2nd or the next business day for the June 30 results</i>		
Efficient use of volunteers' time:		
MP1	200 points; (600 points maximum)	For each organized specific MP event. At a minimum, this is to include an MP presentation and be advertised ahead of the event. Examples of MP events include, but not limited to: Member bring a Member, Employer Recognition, Principal Night, etc.
MP2	20 points; (100 points maximum)	For each meeting where new members and advancements are recognized.
MP3	10 points; (200 points maximum per year)	For each non-member invited and who attends a chapter meeting (10 points per person). Additional 10 points for each person who becomes a member within 30 days (name to be added to notes).
MP4	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.
MP5	100 points; (100 points maximum)	For the incoming MP Chair to meet with the outgoing MP Chair to review responsibilities, obtain templates, and receive prior-year reports. Meeting must occur by August 31 .
RVC/Chapter MP Chair may enter the following points:		
MP6	100 points; (100 points maximum)	For the MP committee chair or co-chair attending the MP CRC workshop.
MP7	50-100 points; (100 points maximum)	For the MP committee chair or co-chair attending the MP centralized training (100 points for in-person CT and 50 points for virtual CT).
MP8	100 points; (100 points maximum)	For planning and goal setting session with RVC by October 1 . (50 points for planning session and 50 points for transmitting MBO)
MP9	50 points; (300 points maximum)	For every meeting with RVC through the year (not including MBO session).
MP10	10 – 100 points; (100 points maximum)	For achieving goals established in goal-setting session with RVC (<i>points assigned by June 30</i>).
Automatically Assigned Points		
MP11	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.
MP12	25 points; (250 points maximum)	For each 10% of total new members retained (<i>dues paid second and third year</i>).
MP13	50 points per member; (300 points maximum)	For each member who rejoins or is reinstated after being cancelled.
MP14	50 points; (no maximum points)	For each 0.5% growth in membership at the end of fiscal year above starting point (calculated from number of paid and unpaid members at the start and end of the year, not including students).



PAOE AWARDS

BLUE RIBBON AWARD

Chapter MP Chair with highest MP PAOE points in the region

RED RIBBON AWARD

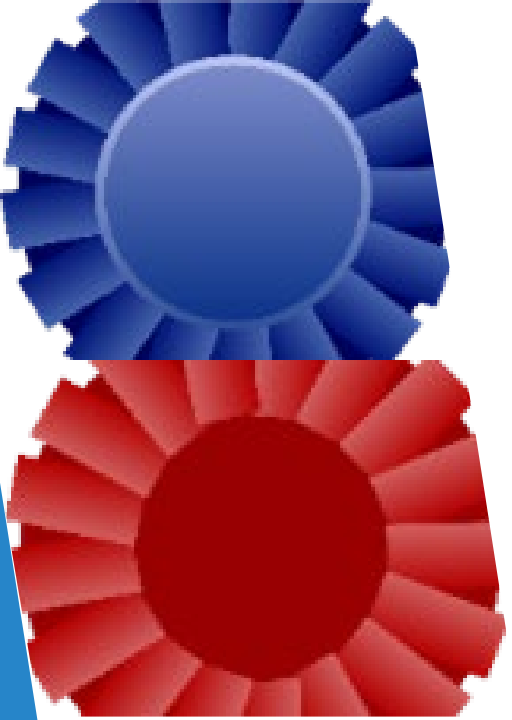
Chapter MP Chair with second highest MP PAOE points in the region

LIMELIGHT AWARD

Chapter MP Chair with the highest net positive growth on a percentage basis

BOOMERANG AWARD

Chapter MP Chair with the highest non-student membership retention rate on a percentage basis





LINCOLN BOUILLON AWARD

- Established in 1967 in memory of President Lincoln Bouillon
- Recognizes the member who performs the most outstanding job in increasing the membership of the Society
 - Increasing chapter membership
 - Reducing the number of delinquent members
 - Increasing the number of members who advance
- Recommended by MP Committee

**This could be
YOU!!!**



QUIZ #3



QUESTIONS?



MEMBERSHIP
PROMOTION
VIRTUAL
CENTRALIZED
TRAINING

September 18, 2026
Session 2



RECRUITMENT



RECRUITMENT: MP CHAIR'S JOB

PROMOTE ASHRAE!!!!

COMMUNICATE

- Benefits of ASHRAE
- Regular Chapter newsletters/blog
- Send personal emails

CREATE

- Inviting atmosphere
- Incentives to join

TARGET

- Individuals
- Employers





COMMUNICATE: BENEFITS OF ASHRAE

THE TANGIBLES

- ASHRAE Handbook
- ASHRAE Journal, Insights, HPB Magazine
- ASHRAE Newsletters/Blog
- ASHRAE Standards
- Leadership Training

THE INTANGIBLES

- Networking
- Personal and Professional Development
- Secure employment or career advancement
- Fun!



New, full dues
paying Full
Members and
Associates
receive

\$2,269

in free
ASHRAE
products and
\$100s
more in
discounts.

join.ashrae.org

Value of ASHRAE Membership

Members select one of four as an annual benefit:



One ASHRAE
Standard (PDF)

up to \$200 value



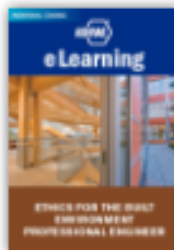
Upcoming
Handbook (PDF)

\$285 value



One Certification
Study Guide

\$74 value



One
eLearning
Course

up to \$60 value



ASHRAE
Journal
Subscription

\$90 value



Science and
Technology
for the Built
Environment

\$390 value



One Year
of ASHRAE
Handbook
Online

\$315 value



One Free
Society
Conference

\$900 avg. value



Technology
Portal
Member Access

\$289 value



ASHRAE
Bookstore

25% Off



ASHRAE
Professional
Development

avg \$200 savings



ASHRAE
Certification

\$200 savings



CREATE: INTEREST IN ASHRAE

INVITING ATMOSPHERE

- Greet/Recognize Members at Meetings

INCENTIVIZE

- Membership Drives/Contests
- New member gifts

MEMBERSHIP DRIVES

- At Chapter Meetings
 - “Member Bring a Member” (offer a gift)
 - Set up computer with member application



March 2021

Alaska Chapter Newsletter
Hot Gas Bypass

President's Message:

Alaska ASHRAE Members,
I am so glad to believe we just have a couple more months left before we break summer! I hope you are all enjoying the extra sunshine we've been having. I would like to thank those of you who attended the February meeting. It was well-attended and there was a lively discussion at the end, thank you all for participating. As well, thank you to those who contributed and/or volunteered during Engineering Month in any capacity. Always appreciated.



TARGET MARKET

Engineers / Consultants

Architects

Contractors

Sales Engineers

Distributor

Manufacturer's Reps

Teachers / Researchers

Government, Health & Education Leaders

Design Build Contractors

Facility Managers

Building Owners

Property Managers

Students

TARGET MARKET

Members of other Organizations

ASPE	IFMA (Facilities)
USGBC	CASHE (Healthcare)
AIA	IMechE
MCAA	ISHRAE (India)
ACCA	PHVAC&R (Pakistan)
BOMA	SAIRAC (South Africa)
NAWIC	SAIMechE (South Africa)
AGC	SAICE (South Africa)

ARE THERE OTHERS?

TARGET: CONNECTIONS

What do prospective members want?

- Networking Opportunities?
- Visibility and Recognition?
- Join Chapter/Society Committee?
- Professional Development?
- Connect with industry peers and their customers?
- Career Advancement?
- Leadership Training?
- Fun?

How do you find this out?

Just ASK!!!!



CONNECTING CORE VALUES:

WHAT DO PROSPECTIVE MEMBERS & EMPLOYERS WANT?



“How can I better serve my clients”

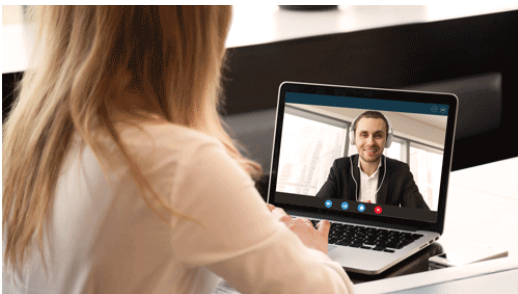
ASHRAE Standards

- Offers design guidance → Provide right solutions to their clients



Chapter Meetings

- Offers local training on industry topics



ASHRAE Webinars

- Training from the comfort of your office on industry topics

CONNECTING CORE VALUES:

WHAT DO PROSPECTIVE MEMBERS & EMPLOYERS WANT?



“Ways to connect with industry peers”

ASHRAE provides phenomenal networking opportunities in a non-competitive environment

- Chapter Meetings
- Social Events
- Committee Involvement
- Annual & Winter Conferences

CONNECTING CORE VALUES:

WHAT DO PROSPECTIVE MEMBERS & EMPLOYERS WANT?



“Visibility and Recognition”

ASHRAE’s Honors and Awards recognize the technical and personal achievements of our members.

What better way than to be honored by **THE** Society that defines the standards for our industry?

PROMOTE ASHRAE

YOU'VE IDENTIFIED THEIR CORE VALUES, NOW WHAT?

Time to Tell your ASHRAE Story (Elevator Pitch)

- How has ASHRAE benefited you?

Your Elevator Pitch should be:

- Personal
- Concise
- Persuasive
- Communicate value of ASHRAE – both tangibles & intangibles!



ASHRAE REACH PROGRAM



www.ashrae.org/reach

Employer support program

- Tips and templates to help promote ASHRAE
- Printed materials to give to employers

CONNECT-A-COLLEAGUE



Pre-written invitation to join
ASHRAE

Sent on your behalf
Available to any member



It is so simple! Just enter:

Your name & email
Colleague's name and email,
Press send!

**PROMOTE THIS PROGRAM
TO YOUR MEMBERS!**

www.ashrae.org/connect



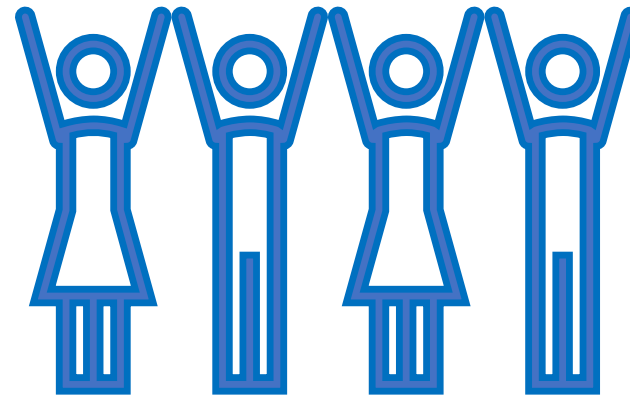
WHEN THEY JOIN

New Members are assigned to a Chapter based on their address

- **Area-Assigned Member** (AAM) for Chapter

Option to pay Chapter dues during registration

- Members who pay their chapter dues are **Chapter Dues Paying Members**
- Chapter membership is now 'opt-out' (must click box to not pay chapter dues).
- Why encourage payment?
 - ➔ **Income for YOUR Chapter!**
- Local benefit for Member and easier to retain members with a local chapter connection.



THEY'VE JOINED, NOW WHAT?

You will receive a monthly email identifying new members:

- Send them a welcome email
 - Thank them for joining!
 - List Chapter meeting schedule
 - Upcoming social events
 - Invite them to the next meeting
 - Visit [Membership Promotion Resources](#) for welcome letter template
- Ask YEA Chair to contact YEA members
- Post new member in newsletter, list member grade
- Announce new members at next Chapter meeting
 - Have them stand to be recognized
- Get them involved!

OTHER IDEAS?

RECRUITMENT: WHAT HAS WORKED BEFORE?

MP BATTLE:

- Encourages employer support
- Trophy awarded at end of year, monthly shoutouts to top 3 companies
- Invite CEO/Principal to ASHRAE meeting for presentation

EVENT SPONSORSHIP:

- Technical Seminar or Trade Show
- Various levels of sponsorship offered different number of free memberships



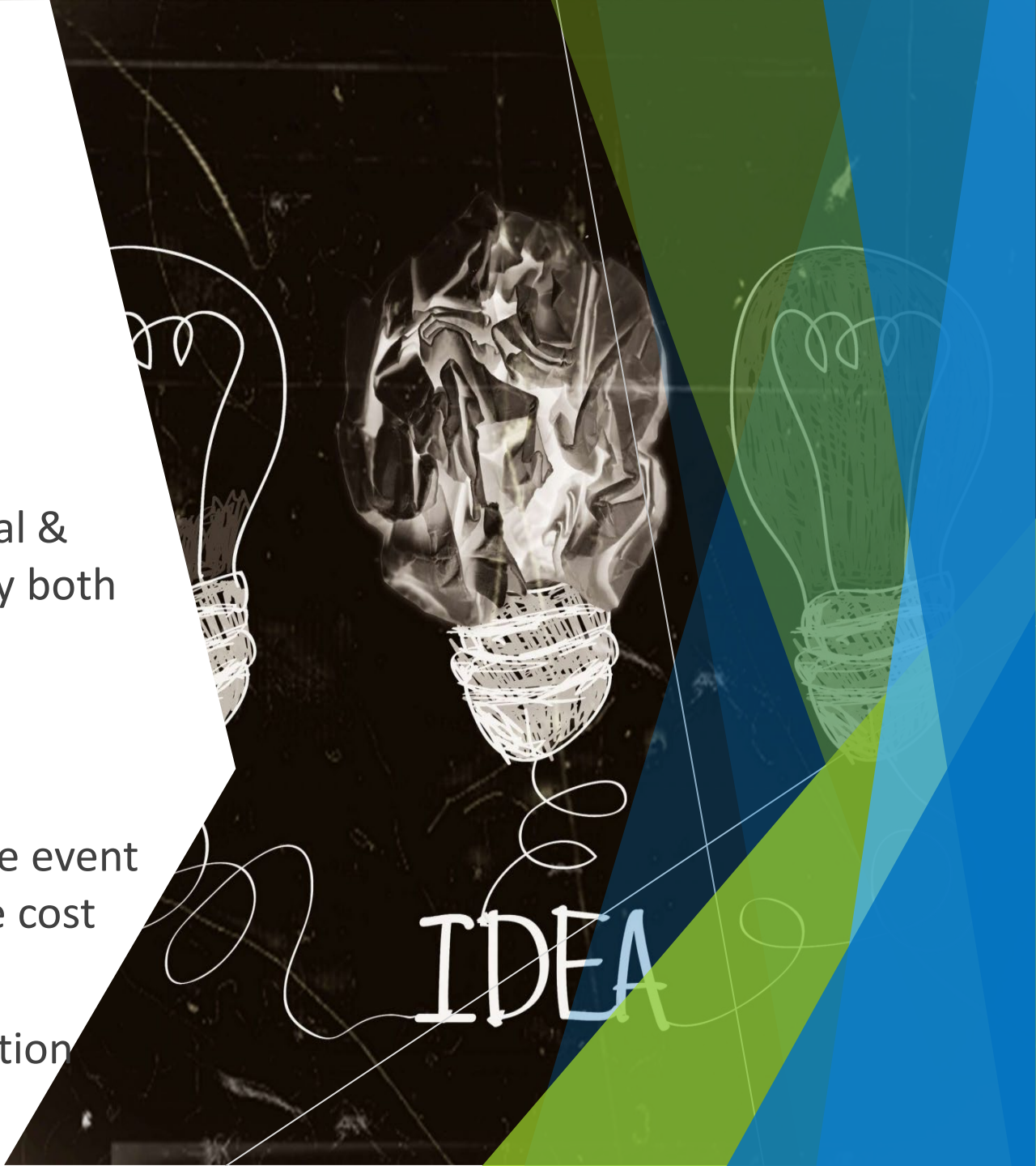
RECRUITMENT: WHAT HAS WORKED BEFORE?

TARGET DIFFERENT SECTORS:

- Think outside of the box
- Granite State Chapter invited School Principal & Superintendent to an IAQ presentation. They both joined ASHRAE as a result.

VIRTUAL COMPETITIONS:

- San Joaquin Chapter hosted a virtual roulette event where the winner earned credit towards the cost of membership
- Could be used with a raffle or trivia competition



RECRUITMENT BREAKOUT



ROLE PLAY – IT'S TIME TO PRACTICE!

Scenario #1: I'm a recent graduate with ME degree looking for a job and not sure if I will work in this industry.

Scenario #2: I have worked for 10 years at a consulting engineering firm primarily doing HVAC design. My employer does not support membership in organizations.

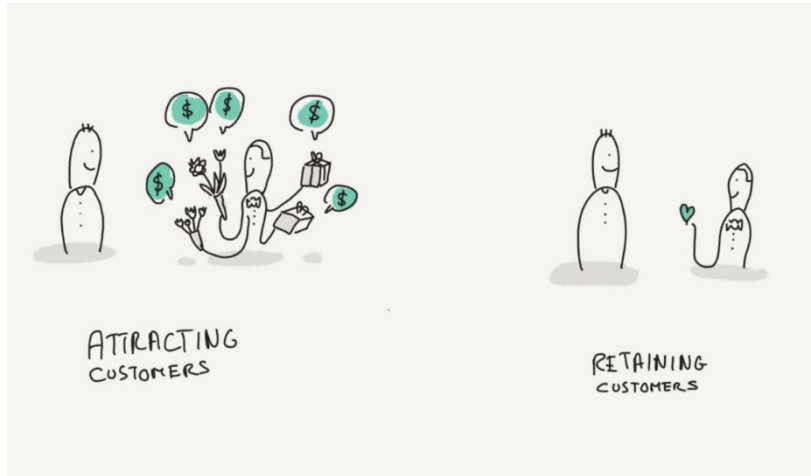
Scenario #3: I recently graduated from college and started a new job as a manufacturer's rep selling HVAC equipment.

Scenario #4: I'm a facilities manager at a major university and I have 3 kids under the age of 5.

Scenario #5: I've 20 years experience working primarily on healthcare projects. My company supports membership in one organization, and I am currently an ASHE member.

Scenario #6: I already attend all local chapter meeting, why do I have to join?

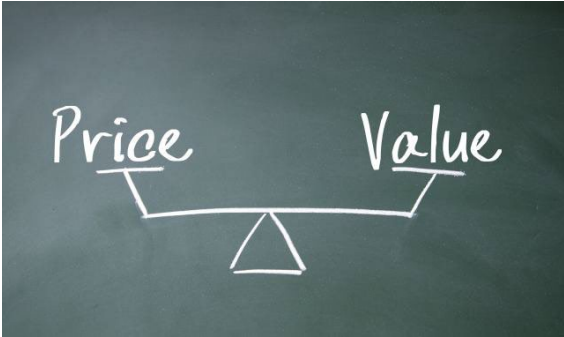
RETENTION



“It is 6-7 times more expensive to acquire a new customer than it is to keep an old one”

Source White House Office
of Consumer Affairs

RETENTION: MP CHAIR'S JOB



MAINTAIN VALUE!!!

REMIND

The member originally joined because they saw value in membership

ENGAGE

Keep the member engaged so that they believe in the value of continued membership

ENGAGE MEMBERS

RETENTION BEGINS THE MOMENT A NEW MEMBER JOINS!!



- Work with CTTC to ensure chapter events engage all members
- Invite members to chapter board meetings & to take on roles
- Know your members and recognize them i.e. Congratulate new PE/PEngs
- Support engagement of YEA and Student members
- **Ask for feedback!**

MP CHAIR TASKS TO IDENTIFY

RUN REPORTS MONTHLY

- Track members who are in Grace or approaching renewal
- Review delinquencies at BOG meetings

CONNECT WITH MEMBERS

- Ask why they have not renewed
- Ask why they have cancelled
- Provides options and solutions

FORM A RETENTION SUB-COMMITTEE

- Share the workload!



MP CHAIR TASKS TO ENGAGE

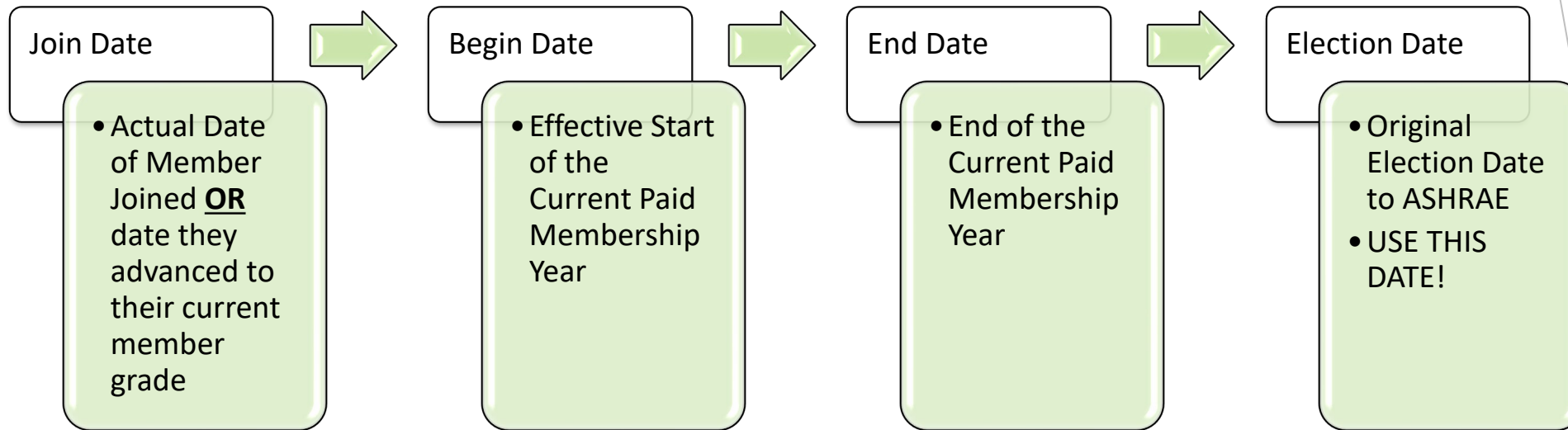
RETENTION CALLING CAMPAIGNS!!

- Focus on 90-180 days past due first
- Reach out to non-dues paying members
- Split up the list
- Call or email each member
- Use Membership Promotion Toolkit – template scripts/emails
- Be prepared:
 - Know benefits of ASHRAE, latest advancements, upcoming local events, etc.
 - Instructions for helping members renew
 - Offer to email link to renew

TRACK YOUR SUCCESS!



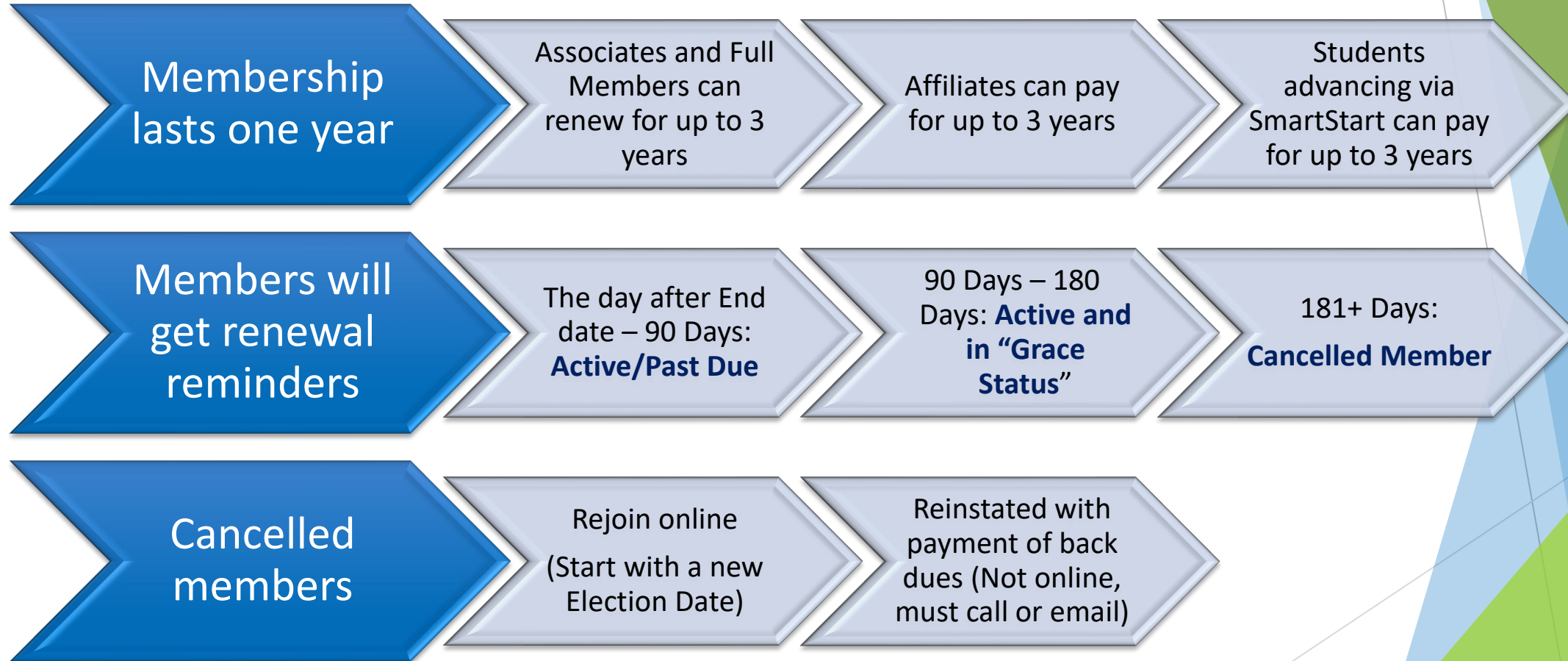
MEMBERSHIP CYCLE



Example:

Member No	Member Type	Join Date	Begin Date	End Date	Election Date	Member Status
1234567	Full Member	2010-04-14	2020-05-01	2021-04-30	2010-05-01	Active
2345678	Associate	2011-01-10	2020-02-01	2021-01-31	2011-02-01	Active

MEMBERSHIP CYCLE



REMEMBER YOUR RESOURCES

Membership Promotion Toolkit!!

- www.ashrae.org/mpchair
- Delinquent Member template email
- Cancelled Member template emails
- Calling Campaign guides
- Retention presentations and ideas
- Principals Night Kit
- MP Retention Challenge
- Your RVC!



RETENTION: WHAT HAS WORKED BEFORE?

SUCCESS STORIES:

- Personal emails to explain Hardship Clause
- Chapter Subsidies:
 - If Hardship Clause doesn't apply
 - Sponsor Student Memberships
- Using the BOG to manage delinquencies:
 - Monthly list sent to group
 - Divide and conquer!
- Member spotlight at meetings:
 - Recognize both new & longstanding members



RETENTION: WHAT HAS WORKED BEFORE?

INTERESTING EVENTS:

- Whiskey Tasting & Chapter Lore
- Goat Yoga
- Networking Happy Hour
- Salsa & Margarita Making
- Virtual Escape Room
- Holiday Sweater Bingo
- Trap Shoot
- Fishing
- Paint & Wine Night



COMMON OBJECTIONS

**WHY DO MEMBERS ALLOW THEIR
MEMBERSHIP TO LAPSE?**

OVERCOMING OBJECTIONS

“I FORGOT”

“I NEVER GOT A REMINDER”

SOLUTION:

- Provide them the opportunity to renew straight away
- Walk them through online renewal
- Email the link to renew:
<https://www.ashrae.org/ashrae-membership/renew>
- Remind them to update their bio

OVERCOMING OBJECTIONS

“I DON’T HAVE TIME FOR ASHRAE...”

SOLUTION:

- Wealth of opportunities to get involved, but the level of involvement is up to the member
- Technical standards, guidelines and seminars offered by ASHRAE help take the guesswork out of systems design, making engineers more efficient
 - SO, they can spend more time doing what is important to them!

RETENTION BREAKOUT



ROLE PLAY – IT'S TIME TO PRACTICE!

Scenario #1: I don't have time to participate or utilize the resources of ASHRAE.

Scenario #2: My company will no longer pay for my membership.

Scenario #3: Due to my current economic situation, I couldn't justify the expense.

Scenario #4: I fundamentally disagree with some of the ASHRAE current agenda items.

Scenario #5: I do not understand the current ASHRAE benefits and did not renew.

PLANNING FOR SUCCESS



PLANNING FOR SUCCESS

- Start planning early!
- Attend Centralized Training and Region CRC Workshop
- Establish Co-Chair & Committee in the May/June
 - Recruit YEAs, new members, etc.
 - Meet to discuss ideas
 - Assign roles – Recruitment Chair, Retention Chair, etc.
- Understand Reports – practice running them
- Review previous year's membership data
 - New members
 - Cancelled members
 - Review demographics - where do you need to diversify?

PLANNING FOR SUCCESS

- July, ask your chapter president for copy of the Presidential Newsletter!
Set your MP Plan to maximize the new PAOE points.
- Schedule a Planning Session with your RVC before October 1st (PAOE points!)
 - Prepare your MBOs and review them monthly
- Understand Growth Goals
 - Determined by your RVC & MP Committee
 - Net Growth Change = New Members – Cancelled Members
 - + Transfers in – Transfers out
- Check in regularly with your RVC – **we want to hear from you!**
- **Set your Plan Early - July!!**

PRESIDENTIAL AWARD OF EXCELLENCE

MEMBERSHIP PROMOTION CATEGORY 2026-27 PAOE

MINIMUM: 800 POINTS		PAR: 1400 POINTS
<i>*All end of the year reports are run on July 2nd or the next business day for the June 30 results</i>		
Efficient use of volunteers' time:		
MP1	200 points; (600 points maximum)	For each organized specific MP event. At a minimum, this is to include an MP presentation and be advertised ahead of the event. Examples of MP events include, but not limited to: Member bring a Member, Employer Recognition, Principal Night, etc.
MP2	20 points; (100 points maximum)	For each meeting where new members and advancements are recognized.
MP3	10 points; (200 points maximum per year)	For each non-member invited and who attends a chapter meeting (10 points per person). Additional 10 points for each person who becomes a member within 30 days (name to be added to notes).
MP4	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.
MP5	100 points; (100 points maximum)	For the incoming MP Chair to meet with the outgoing MP Chair to review responsibilities, obtain templates, and receive prior-year reports. Meeting must occur by August 31 .
RVC/Chapter MP Chair may enter the following points:		
MP6	100 points; (100 points maximum)	For the MP committee chair or co-chair attending the MP CRC workshop.
MP7	50-100 points; (100 points maximum)	For the MP committee chair or co-chair attending the MP centralized training (100 points for in-person CT and 50 points for virtual CT).
MP8	100 points; (100 points maximum)	For planning and goal setting session with RVC by October 1 . (50 points for planning session and 50 points for transmitting MBO)
MP9	50 points; (300 points maximum)	For every meeting with RVC through the year (not including MBO session).
MP10	10 – 100 points; (100 points maximum)	For achieving goals established in goal-setting session with RVC (<i>points assigned by June 30</i>).
Automatically Assigned Points		
MP11	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.
MP12	25 points; (250 points maximum)	For each 10% of total new members retained (<i>dues paid second and third year</i>).
MP13	50 points per member; (300 points maximum)	For each member who rejoins or is reinstated after being cancelled.
MP14	50 points; (no maximum points)	For each 0.5% growth in membership at the end of fiscal year above starting point (calculated from number of paid and unpaid members at the start and end of the year, not including students).



SCHEDULE YOUR MP EVENTS

- Schedule minimum two (2) MP events
 - First by November
 - Member bring a Non-Member Night
- Offer door prize or hold a prize raffle
- **Recognize** new & advanced members, as well as employers who support ASHRAE membership
- Presentation to promote membership
- Always bring a computer/tablet to sign up new members online
- PAOE: 200 pts/event



EXECUTING THE PLAN

Don't try to do it yourself!

- Work with your CTTC chair / board to ensure you have programs that attract new members and keep existing members engaged
- Get members involved!
- Use the monthly task checklist as a guideline
- Take advantage of special events as recruitment opportunities (ex. Golf Tournaments, Holiday Parties, etc.)
- Take advantage of the available resources
- New Member orientation

WORK WITH YOUR SA & YEA CHAIRS

- Attend SA and YEA events
- Engage graduating students & encourage Smart Start
- Understand YEA Programs:
 - Leadership Weekend 1.0 & 2.0
 - LeaDRS
 - Leadership U
 - YEA Leadership International
 - HVAC Design Scholarship



CHAPTER ROLES

One way to retain a member is to give them a job!

- Options include Chapter Historian, Webmaster, Reception Chair
 - Attends meetings and takes pictures
 - Documents Chapter achievements
 - Connects with all generations of members – New to ‘Experienced’
- PAOE Points are available
- See the Manual for Chapter Operations

OTHER IDEAS?

BEST PRACTICE BREAKOUT



BEST PRACTICES

GET INTO YOUR GROUPS AND
BRAINSTORM 8-10 THINGS THAT
HAVE WORKED IN YOUR CHAPTER

BEST PRACTICES

- Meeting options:
 - Lunchtime vs evening
 - Virtual vs in-person
 - Technical tours & factory visits
 - Multi-Chapter meetings or co-hosting meetings with other organizations
- Social Media:
 - WhatsApp, Facebook, LinkedIn
 - Used for Chapter communication & activity updates
 - Meeting notices
- Recruit at meetings:
 - Bring computer to allow them to join ASHRAE at meeting
 - Follow up with non-members who attended meetings or events
 - Review list of member prospects with BOG

BEST PRACTICES

- Diversity, Equity & Inclusion:
 - Make everyone feel welcome and included
 - Offer a variety of chapter activities to ensure everyone is represented.
 - Utilize all experience, expertise and skills to maximize value of Chapter for your members
- Welcome new members:
 - Recognize at meetings and/or in newsletter
 - ASHRAE Personalized Gifts
 - Mentor program

QUESTIONS?

WEBSITES

MP Training Central

www.ashrae.org/mpchair

REMEMBER THIS ONE!! TONS
OF USEFUL MP RESOURCES!!!

ASHRAE

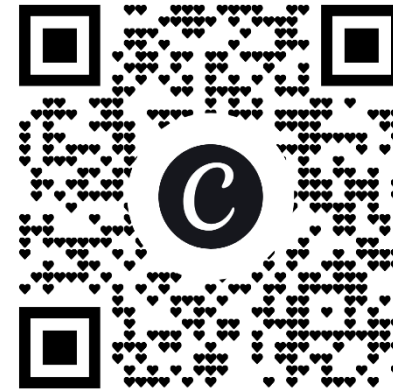
www.ashrae.org

MP REPORTS
FOUND HERE!!

Facebook

<https://www.facebook.com/ASHRAEupdates>

Join ASHRAE



LinkedIn

<https://www.linkedin.com/company/ashrae-membership-promotion/>

ASHRAE Marketing Central

www.ashrae.org/marketing

TOOLKITS &
SWAG HERE!

RESOURCES

Manual for Chapter Operations

- MP Chair Responsibilities

Rules of the Board

- Membership Grades

ASHRAE Bylaws

- Dues

**MANUAL
FOR
CHAPTER OPERATIONS**

ASHRAE
180 TECHNOLOGY PARKWAY - PEACHTREE CORNERS, GA 30092

*Newly Revised and Approved by Members Council
2014.01.21*

Last Revised: 2025-August-21

MEMBERSHIP PROMOTION CENTRALIZED TRAINING

THANK YOU!

TELL US WHAT YOU THINK!

