ASHRAE Region XIII CRC 2021
Membership Promotion (MP)
Training Workshop
28 Aug 2021 (Sat)

Ir Dr. Sam C. M. Hui
Regional Vice Chair – Membership Promotion
sam.cmhui@gmail.com
REGION XIII MP CHAPTER CHAIRS (2021-2022)

- Hong Kong: Mr KWOK Yat Sing Jason <jasonyskwok@gmail.com>
- Indonesia: Mr Jati WIDIPUTRA <jatiwidiputra@ymail.com>
- Japan: Prof Kyosuke HIYAMA <hiyama@meiji.ac.jp>
- Macau: Mr LIN Bin <ambitionbin@gmail.com>
- Malaysia: Mr Ee Seong ENG <eeseong_93@hotmail.com>
- Philippines: Ms Jean Leilani Grace N. CLEMENTE <jelainc1209@gmail.com>
- Singapore: Mr Sriman CHAKRAVARTHULA <sriman.ncvk@iesve.com>
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- Taiwan: Mr Hugo LAI <lai.hugo@msa.hinet.net>
- Thailand: Dr Thosapon KATEJANEKARN <thosaponk@hotmail.com>
## Region XIII Area Assigned Members (AAM)

<table>
<thead>
<tr>
<th>Country</th>
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AGENDA

- WHAT DOES THE MP CHAIR DO?
- ASHRAE ORGANIZATION
- MEMBERSHIP GRADES
- RECRUITMENT
- RETENTION
WHAT DOES IT MEAN TO BE A MEMBERSHIP PROMOTION CHAIR?

- **RECRUITMENT**
  - Attract new Chapter members in all industry segments

- **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?

Attend Training:

- Centralized Training (Annual Conference)
- Chapters Regional Conference (CRC) Workshop

- Training Costs
  - Transportation paid by Society
  - Seek reimbursement from your BOG

FORM A COMMITTEE!
WHAT DOES THE MP CHAIR DO?

Prepare your Management By Objectives (MBO)

- Set goals with your RVC (by October 1st)
- Focus: Recruitment and Retention
- Discuss with your Co-Chair & Committee

Attract new members - Diversify

- Organize MP drives & events, ASHRAE Trainings with ALI and Certifications

Manage delinquent members

- Collaborate with Student Activities (SA) & Young Engineers in ASHRAE (YEA)
WHAT DOES THE MP CHAIR DO?

Encourage Membership Advancements

Acknowledge new/advanced members

- Chapter Meetings
- Newsletters

Get to know your members!!

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

- “ASHRAE” founded in 1959...
  Merger of ASHAE 1894 & ASRE (1904)

- Global headquarters in Peachtree Corners, GA...
  Newly renovated (2021), Net-Zero Energy Building

- 51,500 members (May 2021)...
  Down due to Covid-19

- 15 Regions...
  With 199 Chapters & 400+ Active Student Branches
ASHRAE Core Values

- Commitment
- Diversity
- Excellence
- Volunteerism
- Collaboration
- Integrity
ASHRAE REGIONS

15 ASHRAE Regions throughout the world

Regions are comprised of 7 – 32 Chapters each

- US/Canada/Central & South America: Regions 1-12
- Asia: Region 13
- Europe: Region 14
- Region-at-Large
REGIONAL ORGANIZATION

- Regional Member’s Council Representative (RMCR)
- Regional Historian
- Region Electronics Communications
- Regional Treasurer
- CRC General Chair
- Nominating Committee Member
- Nominating Committee Alternate
- Nominating Committee Reserve Alternate
- CRC General Chair
- Elected by Delegates & Alternates
- Elected by Chapter BOG

- Nominated by CRC & Appointed by Society President-Elect
- Student Activities RVC
- Membership Promotion RVC
- Research Promotion RVC
- Chapter Technology Transfer RVC
- Government Affairs RVC
- YEA Regional Vice Chair
- Appointed by DRC
- Elected by Membership
- Appointed by DRC
- Elected by Membership
- Appointed by DRC
- Elected by Membership
2021-22 Executive Committee

President Elect
Farooq Mehboob
Fellow/Life Member

President
Michael (Mick) Schwedler
Fellow Member

Secretary
Jeff Littleton
Executive Vice President
MEMBERSHIP STAFF

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

Jeanette McCray
Assistant Manager, Membership
Tel: 678-539-1178
JMccray@ashrae.org
WEBSITES

MP Training Central
mptraining.weebly.com

ASHRAE
www.ashrae.org

Facebook
www.facebook.com/ASHRAEupdates

ASHRAE Marketing Central
www.ashrae.org/marketing

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

MP REPORTS FOUND HERE!!

ASHRAE NEWS & EVENTS!

TOOLKITS & SWAG HERE!
RESOURCES

Manual for Chapter Operations
- MP Chair Responsibilities
- Membership

Rules of the Board
- Membership Grades

ASHRAE Bylaws
- Dues
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
STUDENT MEMBER

- Full-time student in a Society-related approved course of study
- Undergraduate & Graduate

- Dues: $25/ year
STUDENT MEMBER - BENEFITS

- ASHRAE Journal, eSociety, HVAC&R Newsletter
- High Performance Building Magazine
- Discounts:
  - ASHRAE Publications
  - Society Conference registration
  - Professional Development Courses
- ASHRAE Technology Portal
- Not Included:
  - ASHRAE Handbook (can be purchased for $39/$54 online/printed)
  - Hold office at the Chapter, Region, and Society levels
  - Voting Privileges
AFFILIATE MEMBERSHIP

- New to the Industry
- 30 years old or younger or former Military

Reduced Dues:
- Year 1 $60
- Year 2 $85
- Year 3 $115
- Year 4 $230 (Associate Member Grade)

- Previous Student Members are not eligible
AFFILIATE MEMBER - BENEFITS

- ASHRAE Journal, eSociety, HVAC&R Newsletter
- High Performance Building Magazine
- Discounts:
  - ASHRAE Publications
  - Society Conference registration
  - Professional Development Courses
- ASHRAE Technology Portal
- Not Included:
  - ASHRAE Handbook (15% off)
  - Hold office at the Chapter, Region, and Society levels
  - Voting Privileges
ASSOCIATE MEMBER

- Professionals with < 12 years Industry Experience
- Returning Members

- Society Dues: Regular $230/year

- Chapter Dues – Set by each Chapter
  - Optional
  - Encourage payment
  - Dues directly benefit Chapter
ASSOCIATE MEMBER - BENEFITS

- NEW for 2021:
  - 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
**FULL MEMBER GRADE**

- Professionals with 12 Society-approved years of experience:
  - Post-Secondary Education:
    - Undergraduates: 1 year/year of school (2 min.)
    - Graduates: 1.5 years/year of school

- Related work experience
  - 1 year/year of employment in related field

- Professional licensure
  - 3 years
**Full Member Grade**

- Society Dues: Regular $230/year

- Chapter Dues – Set by each Chapter
  - Optional
  - Encourage payment
  - Dues directly benefit Chapter
FULL MEMBER - BENEFITS

- NEW for 2021:
  - 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
PROSPECTIVE ADVANCEMENT TARGETS FOR MEMBER

- Requires 12 years experience in our industry
- PE License means:
  - Four years college
  - Min. four years work experience
  - Three years PE/PEng license

Why Encourage Advancements?

- Associate to Full Member Advancements = PAOE POINTS!

  Identify Advancement Targets using Chapter Master List
  - Sort by “Member Type” – Associate Member
  - Join Date > 2008? Yes → Upgrade to “Full Member”
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
DEVELOPING ECONOMIES MEMBERSHIP PROGRAM

- What is it?
  - “Low income” & “Lower Middle Class” countries
  - Defined by The Word Bank

- Dues – Approximately 50% reduced fee

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<td>Associate</td>
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<td>$135</td>
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<td>Full Member</td>
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**DEVELOPING ECONOMIES - BENEFITS**

Visit: [https://www.ashrae.org/membership/member-benefits](https://www.ashrae.org/membership/member-benefits)

<table>
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<tr>
<th>Benefit</th>
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<td>Yes</td>
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<tr>
<td>ASHRAE Journal</td>
<td>Digital Only</td>
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<td>Digital Only</td>
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<tr>
<td>Hold Office &amp; Vote</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
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<td>eSociety &amp; HVAC&amp;R Newsletter</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>High Performance Building Magazine</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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OTHER MEMBERSHIP GRADES: HONORARY MEMBER

- Any notable person of preeminent professional distinction
- Elected by Board of Directors
- Previous Society Member – Nope!
- Deadline for nomination: December 1
- Exempt from annual dues
- 2019 Recipient

Bill Gates
OTHER MEMBERSHIP GRADES: FELLOW

- Attained distinction in the field of HVAC or the allied arts and sciences through:
  - Invention
  - Research
  - Teaching
  - Design
  - Original work
  - Engineering executive on projects of unusual or important scope
- Current ASHRAE Member (10 years)
- Deadline for nomination: December 1
- College of Fellows
  - Ambassadors – Enhance ASHRAE’s image in Community
  - Increase awareness of ASHRAE
OTHER MEMBERSHIP GRADES: LIFE MEMBER

- Member or Associate Member
- Good standing ≥ 30 years AND Age ≥ 65 years
- Exempt from dues
- Can request handbook
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 $35.00
- MP Chair feedback:
  - Losing members to due retirement

Developing Economies Retired Member
- Same requirements as a Retired Member
- Receive monthly digital Journals & Insights newsletters
- No Handbook
- Annual dues are $20.00

NOTE: Society Staff have to transfer Associate and Members to Retiree, can not be done online. Just email membership@ashrae.org
MEMBERSHIP ADVANCEMENTS
STUDENT → ASSOCIATE MEMBER

SmartStart Program:

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

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<td>$50</td>
</tr>
<tr>
<td>Year 3</td>
<td>$115</td>
<td>$70</td>
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</table>

- 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 cumulating “Member” years
- Qualify for specific Honors and Awards
- Qualify for Regional & Society positions
- Prestige

- Why not? → No additional cost
Recruitment
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
- ASHRAE Trainings through ALI and Certifications!
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: 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 Handbooks
- ASHRAE Journal, Insights, HPB Magazine
- ASHRAE Newsletters/Blog
- ASHRAE Standards
- Leadership Training

THE INTANGIBLES
- Networking
- Personal and Professional Development
- Fun!
- Secure employment or career advancement
ASHRAE Membership

Your (NEW!) Membership Benefits

A NEW selection of complimentary ASHRAE products is now available to new and renewing, full dues paying Member and Associate grade members.

Full Members and Associates can now select 1 of the following:

- eLearning Course: to select from 150
- ASHRAE Standard: to choose from 100+
- ASHRAE Handbook: PDF version of the most recent Handbook

Additional Member Benefits by the Numbers

- 12 month subscription to ASHRAE Journal
- 25% discount on 400 publications in the Bookstore
- 2000+ free resources for members in the ASHRAE Technology Portal
CREATE:
INTEREST IN ASHRAE

INVITING ATMOSPHERE
- Greet Members at Meetings
- Recognize Members
  - Member Grade Advancement
  - Membership Milestones (5 yr., 10 yr., 20 yr, etc.)
- Life Members
- ASHRAE Certifications
- Award Achievements
- PE/PEng license

INCENTIVIZE
- Membership Drives/Contests
- New member gifts
CREATE:
INTEREST IN ASHRAE

MEMBERSHIP DRIVES

- At Chapter Meetings
  - “Member Bring a Member” (offer a gift)
  - Set up computer with member application
- Chapter Referral Program
- Award referring member and new member
- Reward Programs for Companies that support membership
  - Recognize at Chapter Meetings, newsletters & Membership emails
- Technical sessions, special member-only events, honors & awards banquets
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: 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!!!!!
How can I better serve my clients?

ASHRAE’s 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
"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 as 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**

- Why encourage payment?
  
  *Income for YOUR Chapter!*
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 www.mptraining.weebly.com 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?
"It is 6-7 times more expensive to acquire a new customer than it is to keep a new one"

Source White House Office of Consumer Affairs
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
RETAIEN: MP CHAIR’S JOB

MAINTAIN VALUE!!!

REMINI: 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
**MEMBERSHIP CYCLE**

- **Join Date**: Actual Date of Member joined OR date they advanced to their current member grade
- **Begin Date**: Effective Start of the Current Paid Membership Year
- **End Date**: End of the Current Paid Membership Year
- **Election Date**: Original Election Date to ASHRAE
  - USE THIS DATE!

**Example:**

<table>
<thead>
<tr>
<th>Member No</th>
<th>Member Type</th>
<th>Join Date</th>
<th>Begin Date</th>
<th>End Date</th>
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<tr>
<td>8186998</td>
<td>Associate</td>
<td>2011-01-10</td>
<td>2020-02-01</td>
<td>2021-01-31</td>
<td>2011-02-01</td>
<td>Active</td>
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</table>
Membership Cycle

Membership lasts one year

Members and Members can renew for up to 3 years

Associates and Members can renew for up to 3 years

Affiliates can pay for up to 3 years

Students advancing via SmartStart can pay for up to 3 years

Members will get renewal reminders

The day after End date – 90 Days: Active/Past Due

90 Days – 180 Days: Active and in “Grace Status”

181+ Days: Cancelled Member

Cancelled members

Rejoin online (Start with a new Election Date)

Reinstated with payment of back dues (Not online, must call or email)
**Remind Members Why**

**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!
REMIND MEMBERS WHY

RETENTION CALLING CAMPAIGNS!!

- Focus on 90-180 days past due first
- Split up the list
- Call or email each member
- Use Weebly – 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!
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
- Know your members and recognize them i.e. Congratulate new PE/PEngs
- Support engagement of YEA and Student members
- Ask for feedback!
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!
OVERCOMING OBJECTIONS

“I LOST MY JOB BECAUSE OF COVID-19”

SOLUTION:

- Explain the ASHRAE Society Hardship Clause
  - This applies to job loss as a direct result of COVID-19
  - Must apply directly to Society
  - If eligible, Society could waive or reduce dues
REMEMBER YOUR RESOURCES

WEEBLY!!
- https://mptraining.weebly.com/
- Delinquent Member template email
- Cancelled Member template emails
- Calling Campaign guides
- Retention presentations and ideas
- Principals Night Kit
- MP Retention Challenge
Questions?