

**2018-2019  
CRC CHAPTER SUMMARY REPORT INSTRUCTIONS**

**1. MEMBERSHIP PROMOTION:**

- **Area assigned members** = members who have paid society dues (available from the **PAOE Area Assigned Member Count Listing** on the ASHRAE website). At [www.ashrae.org](http://www.ashrae.org), login using your email address and password. Mouse over the Communities tab and select Chapter Reports, PAOE and CIQ located on the left. On next page, select the PAOE icon (blue trophy). Under the Presidential Award of Excellence title, select Report (blue box with arrow pointing up). Click on dropdown box for Area Assigned Members then select the PAOE Society year for Area Assigned Members which lists Members and Students, by Region and Chapter.
- **Chapter dues paying members** = number of members in current chapter roster, excluding students (available from the **Chapter Dues Paid/Unpaid Report**). This report is included with the Chapter Reports posted on the ASHRAE website at [www.ashrae.org](http://www.ashrae.org). Use the same login information as shown above in Membership Promotion, select the Chapter Reports icon (orange square with arrow pointing up). **In the second box marked Dues, select "Paid to Society: PDF/XLS"** (pdf or Excel; run by date).
- **New members to date** = new chapter dues paying members (available from the **New Members Report**). This report is included with the Chapter Reports posted on the ASHRAE website at [www.ashrae.org](http://www.ashrae.org). (See instructions above in **Chapter Dues Paying Members**), then select **New Members, PDF or XLS**" (pdf or Excel; run by date).
- **Delinquent members to date** = delinquent area assigned members (available from the **Society Unpaid Dues Report-Members**). This report is included with the Chapter Reports on the ASHRAE website at [www.ashrae.org](http://www.ashrae.org). (See instructions above in **Chapter Dues Paying Members**), in the second box marked **Dues, select Delinquency** (Excel; run by date).

**Instructions to access the Chapter Reports are listed in the above paragraph for Chapter Dues Paying Members. These are live data reports so your numbers are up-to-date. If you have any questions or need further assistance, please contact the following ASHRAE staff: Daniel Gurley ([dgurley@ashrae.org](mailto:dgurley@ashrae.org)); or Vickie Grant ([vgrant@ashrae.org](mailto:vgrant@ashrae.org)) or Tammy Catchings ([tcatchings@ashrae.org](mailto:tcatchings@ashrae.org)).**

**2. STUDENT ACTIVITIES:**

- The number of new student members is available from chapter membership report. (See instructions above in **Chapter Dues Paying Members**), then select **Chapter Change Detail, Summary, PDF** (PDF; run by date).
  - List the number of student branches the chapter is currently supporting.

Information that may be included in the attached chapter executive summary; number of K-12 student activities, number of post high school student activities, number of teach-ins per class to an organized student group and monthly meeting student nights. **For more information contact ASHRAE staff Katie Thomson ([kthomson@ashrae.org](mailto:kthomson@ashrae.org)).**

**3. CHAPTER TECHNOLOGY TRANSFER:**

Information that may be included in the attached chapter executive summary; the number of technical programs on refrigeration technology to professional or business groups, number of presentations by an ASHRAE TC member, number of chapter sponsored continuing education courses and the number of Technology Award submittals into chapter, regional and Society competition.

- List the number of regular monthly meetings with tech program
- List the average chapter monthly meeting attendance
- List the number of seminars, ALI courses, tours or other technical programs outside regular monthly meeting
- List the number of chapter social events
- List the number of Chapter Technology Awards and the number of chapter presentations on refrigeration technology

Information that may be included in the attached chapter executive summary; if the full chapter yearly programs and speakers and schedules were announced in the chapter newsletter by October 22, list of chapter programs and speakers. **For more information contact ASHRAE staff ([cjacobs@ashrae.org](mailto:cjacobs@ashrae.org)).**

**4. RESEARCH PROMOTION/FUNDRAISING:**

- List the chapter goal and the total dollars contributed.

Information that may be included in the attached chapter executive summary; full circle level, number of RP nights, number of contributions \$50 and above, High Five Award and RP trends. **For more information contact ASHRAE staff Julia Mumford ([jmumford@ashrae.org](mailto:jmumford@ashrae.org)).**

**5. GOVERNMENT AFFAIRS:**

- List the Chapter goals and grassroots activities of the past year.
- Seeking proclamations from Governors, Mayors and other elected officials for National Engineers Week (E-week)
- Soliciting nominations for the Government Advocacy Award and obtaining Government Affairs Award entries into regional competition
- Other grassroots activities not mentioned above.

Information that may be included: holding combined Chapter meetings with other organizations to discuss HVAC&R, visiting elected/appointed officials, holding a "Day on the Hill," inviting elected/appointed officials to speak at Chapter meetings. **For more information contact ASHRAE staff ([ayates@ashrae.org](mailto:ayates@ashrae.org)).**

**6. YOUNG ENGINEERS IN ASHRAE (YEA):**

- List the number of new YEA members
- List the total number of YEA members
- List what percentage of the chapter total membership is comprised of YEA members

Information that may be included in the attached chapter executive summary; number of YEA activities and/or events, any SmartStart promotions, and any collaborations with other committee to promote membership recruitment and retention. **For more information contact ASHRAE staff Rhiannon Masterson ([rmasterson@ashrae.org](mailto:rmasterson@ashrae.org)).**

**7. CHAPTER HISTORY:**

Indicate if the chapter had a historical display at the CRC or has moved the current history information to the chapter website.

**8. FINANCES:**

List the chapter total funds balance (include all accounts), chapter dues, average monthly meal cost and the date of the last chapter audit.

Information that may be included in the attached chapter executive summary; the dollar amount for reserve funds, active checking, scholarship accounts. Describe any other sources of income and describe any special project or programs funded by the chapter.

**Contents of Chapter Executive Summary Attachment:**

**1. Chapter Problems**

List your chapter's problems and comment on your solutions to these problems.

**2. Chapter Innovations and Suggestions**

Comment on any successes and new ideas that were introduced during the year.

**3. CRC Summary Form Background**

Include a brief paragraph for each section of the CRC summary report form that highlights the chapter activities not included on the summary for each area.

## 2018-2019 ASHRAE CRC CHAPTER SUMMARY REPORT

REGION			
CRC LOCATION			
CHAPTER			
CHAPTER NUMBER			
<b>1. MEMBERSHIP PROMOTION</b>	<b>YTD/REPORTED 2018-2019</b>	<b>REPORTED 2017-2018</b>	<b>REPORTED 2016-2017</b>
NUMBER OF AREA-ASSIGNED MEMBERS (AAM)			
NUMBER OF CHAPTER DUES PAYING MEMBERS (CDPM)			
NUMBER OF NEW MEMBERS TO DATE (AAM)			
NUMBER OF MEMBERS DELINQUENT TO DATE (AAM)			
<b>2. STUDENT ACTIVITIES</b>			
NUMBER OF NEW STUDENT MEMBERS			
NUMBER OF ACTIVE STUDENT BRANCHES			
<b>3. CHAPTER TECHNOLOGY TRANSFER</b>			
NUMBER OF REGULAR MONTHLY MEETINGS WITH TECH PROGRAM			
MONTHLY MEETING ATTENDANCE (TOTAL/AVERAGE)			
NUMBER OF SEMINARS, ALI COURSES, TOURS OR OTHER TECHNICAL PROGRAMS OUTSIDE REGULAR MONTHLY MEETING			
NUMBER OF TECHNICAL PROGRAMS ON REFRIGERATION TECHNOLOGY			
NUMBER OF SOCIAL EVENTS SEPARATE FROM A TECHNICAL PROGRAM (I.E. GOLF, MEMBER'S NIGHT OUT, ETC.)			
NUMBER OF TECHNOLOGY AWARD SUBMITTALS TO CHAPTER/REGION			
<b>4. RESEARCH PROMOTION/FUNDRAISING</b>			
CHAPTER GOAL			
TOTAL DOLLARS CONTRIBUTED			
<b>5. GOVERNMENT AFFAIRS</b>			
LIST THE CHAPTER GOALS AND GRASSROOTS ADVOCACY OF THE PAST YEAR (USE SEPARATE PAGE)			
INFORMATION THAT MAY BE INCLUDED: HOLDING COMBINED CHAPTER MEETINGS WITH OTHER ORGANIZATIONS TO DISCUSS HVAC&R, VISITING ELECTED/APPOINTED OFFICIALS, HOLDING A "DAY ON THE HILL," INVITING ELECTED/APPOINTED OFFICIALS TO SPEAK AT CHAPTER MEETINGS			
SEEKING PROCLAMATIONS FROM GOVERNORS, MAYORS AND OTHER ELECTED OFFICIALS FOR NATIONAL ENGINEERS WEEK (E-WEEK)			
SOLICITING NOMINATIONS FOR THE GOVERNMENT ADVOCACY AWARD AND OBTAINING GOVERNMENT AFFAIRS AWARD ENTRIES INTO REGIONAL COMPETITION			
NUMBER OF ADVOCACY MEETINGS AND OTHER ACTIVITIES			
OTHER GRASSROOTS ACTIVITIES NOT MENTIONED ABOVE (USE SEPARATE PAGE)			

<b>6. YOUNG ENGINEERS IN ASHRAE (YEA)</b>				
NUMBER OF NEW YEA MEMBERS			N/A	N/A
NUMBER OF TOTAL YEA MEMBERS			N/A	N/A
PERCENTAGE OF YEA MEMBERS FROM THE TOTAL CHAPTER MEMBERSHIP			N/A	N/A
<b>7. CHAPTER HISTORY</b>				
CHAPTER HISTORICAL DISPLAY AT CRC				
CHAPTER HISTORY MOVED TO WEB SITE				
<b>8. FINANCES</b>				
TOTAL FUNDS BALANCE				
CHAPTER DUES				
MEMBER COST OF MEALS				
DATE OF LAST CHAPTER AUDIT				

**SPRING CRCs – ENTER DATA FOR THE CURRENT YEAR IN THE “YTD REPORTED” COLUMN AND ENTER YTD RESULTS OF PREVIOUS YEARS IN THE LAST TWO COLUMNS.**

**FALL CRCs – ENTER DATA FOR THE YEAR JUST COMPLETED IN THE “YTD REPORTED” COLUMN AND ENTER DATA FOR YEAR-END RESULTS OF PREVIOUS YEARS IN THE LAST TWO COLUMNS.**