



ASHRAE

Engineering for the World We Live In

2007 – 2008 ASHRAE Region X CRC Chapter Summary Report

San Joaquin

Chapter #085

www.sjvashrae.org



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Membership Promotion

	YTD Reported 2007/08	Reported 2006/07	Reported 2005/06
Area Assigned Members	91	92	96
Chapter Dues Paying Members	60	54	59
New Members	4	3	6
Delinquent Members	3	4	0



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Membership Promotion

- Highlights
 - Increased interest from students.
 - Increase in the number of **members paying dues**.
- Challenges
 - Attracting new members from industry.
 - **Advancement** of existing members.
- Solutions
 - Find ways to focus on **attracting members from industry**.
 - Communicate with current members to **encourage advancement**.
- Could add new members if?
 - Had ideas to **communicate benefits** of membership and how much **fun** it can be.



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Student Activities

	YTD Reported 2007/08	Reported 2006/07	Reported 2005/06
Number of New Student Members	3	4	2
Number of Active Student Branches	0	0	0
Did you hold a student night?	Yes	Yes	Yes



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Student Activities

- Highlights
 - This will be the 4th year that the local chapter has been able to offer scholarships to those students who have an interest in the HVAC&R industry.
 - **Increased student attendance** at student night tour/dinner.
 - In conjunction with local university, **piloted tour/education program** associated with newly offered HVAC class.
- Challenges
 - Attracting student members from the local university and industry.
 - Developing support for a **student chapter**.
- Solutions
 - Maintaining an annual **\$500 scholarship** to support those student interested in HVAC&R.
 - Increase **awareness of student night tour/dinner**.
 - **Visited local Vocational College** to recruit student members.



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Chapter Technical Transfer

	YTD Reported 2007/08	Reported 2006/07	Reported 2005/06
Number of Chapter Technology Awards	0	2	0
Number of Refrigeration Presentations	1	0	0
Government Activities or interface?	1	1	0



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Chapter Technical Transfer

- Highlights
 - A team of chapter members won an ASHRAE Technology Award – “2008 Honorable Mention!”
 - Supported 2006/07 local award applicants throughout the Regional and Society level application process.
- Challenges
 - Increasing awareness of CTTC activities
 - Attracting qualified members to the committee.
 - Encouraging members to submit applications for technology awards.
- Solutions
 - Gave a presentation at Chapter meeting outlining the purpose of CTTC, how it benefits members and how the awards application process works.



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San Joaquin Chapter Program Activities

	YTD Reported 2007/08	Reported 2006/07	Reported 2005/06
Number of Chapter Technical Sessions, Technical Seminars, Programs or Tours	8	9	8
Number of Social Events (I.e. Golf, Spouse Events, Etc.)	2	2	2
Average Chapter Monthly Meeting Attendance	33	28	31



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Chapter Program Activities

- Highlights
 - Programs attracting more members, including “Recent Changes in OSHPD Regulations,” presented by an OSHPD Regional Compliance Officer... **39 for a lunch meeting – 15% higher attendance than our OSHPD meeting last year!**
- Challenges
 - Continuing the momentum of having technical sessions that attract a large portion of our members.
 - **Notifying non-members** of special events and seminars.
- Solutions
 - Begin the program planning with **end of year survey** polling membership for preferred topics.
 - Continue to make **widely applicable programs** a top priority for attracting members and non-members alike.
 - Provide **humorous “advertising” write-up in monthly newsletter** announcing speaker and topic at upcoming meeting.



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Research Promotion Fundraising

	YTD Reported 2007/08	Reported 2006/07	Reported 2005/06
Chapter Goal	\$7,000 / 47%	68%	100%
Dollars Collected	\$3,280 (YTD)	\$4,775	\$5,500
Dollars / AAM	\$39.04	\$51.90	\$57.29



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Research Promotion

- Highlights
 - Achieved **Full Circle**.
- Challenges
 - **Changed RP Chair mid year** which stunted promotion to members.
 - Difficult to get individual donations; most are currently coming from companies for golf tournament sponsorships
 - Two years of **low golf tournament turnout** has pinched main fundraising activity.
- Solutions
 - Already advertising for next September's golf tournament. **Actively pursuing non-ASHRAE company donations.**
 - Incoming RP chair to focus more on **individual donations.**



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San Joaquin Chapter History

	YTD Reported 2007/08	Reported 2006/07	Reported 2005/06
Chapter Historical Display at CRC	0	0	Yes
Chapter History on Website	Yes	Yes	Yes



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Chapter History

- Highlights
 - Program at Past President's Luncheon included an **historical presentation by a chapter founding member**: ASRE in 1955 and then ASHRAE in 1960! It was a huge success!
- Challenges
 - **Passing on historical information** to newer members in an educational and interesting way.
 - Put together more articles on current/past members.
- Solutions
 - **Encourage participation of past members and presidents during meetings** to provide historical accounts of “the way we used to do it” or “here’s how we solved that problem.”
 - Published newsletter articles on at least two past members.



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San Joaquin Finances

	YTD Reported 2007/08	Reported 2006/07	Reported 2005/06
Total Fund Balance	\$16,638	\$13,091	\$8,200
Chapter Dues	\$35	\$35	\$35
Members' Cost of Meals	\$25	\$25	\$25
Date of Last Chapter Audit	07/2007	07/2006	06/2005
Chapter Foundation?	N/A	N/A	N/A



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San Joaquin Finances

- Highlights
 - Our chapter has continued our push to get new members involved and **raise attendance at monthly meetings**, which has resulted in increased revenue.
 - This year we used some of the funds we set aside as a cash reserve for a **one-time donation of \$3,000** to the new California State University Fresno Mechanical Engineering HVAC Lab.
- Challenges
 - Continuing with our plans for long-term financial health while maintaining strong support for ASHRAE research without “taxing” the same people every year.
- Solutions
 - **Expand the attendance** at our golf tournament **by including others outside ASHRAE** such as architects, general contractors, etc.
 - **Decrease delinquency of chapter dues** among members through education.



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What was the most exciting thing that happened to your chapter this past year?

- Our **average meeting attendance grew by 18%**! We had 44 people at one meeting this year! It WAS an interesting program, but no one knew the topic before the meeting!

How did we make this happen?

- We focused on a **balance of relevant and fun** presentations.
- We got the **newsletter out early** so members would have plenty of time to read it before the meeting.
- We **expanded** the size of our **committee participation** and with that came attendance.
- Maintaining a 50/50 balance of **lunch and dinner** meetings.



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What was the biggest problem this past year and how did you resolve it?

- Midway through the year, a **contributing member and past president moved out of the state**. He was instrumental in improving our financial health over the past years and establishing goals for our BOG members. He was also our RP Chair and his departure left a huge hole in our fund-raising efforts.

What did we do in response?

- **Other members** and BOG **quickly took over** his committee responsibilities
- Another **past-president stepped up** and helped to continue the momentum. It was a real **TEAM EFFORT!**



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My Chapter's Best Practices

1. **Regular communication with members** – newsletter and reminders out on time and invitations to special events such as the Past President's luncheon and our June Social.
2. Increased involvement of officers, chairs, and BOG. We have a **larger board and more active members**, ensuring that the members are not as overwhelmed as in previous years.
3. Promote activities that **earn PAOE points**. Devote time at monthly BOG meetings to discuss PAOE status.
4. **Variety of events**: tours, presentations, roundtable discussions; mix of lunch and dinner meetings.
5. **Measurable goals** for the officers, chairs, and BOG.