



**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](mailto: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>
- ▶ South Korea: Prof LEE Kwang Ho <kwhlee@korea.ac.kr>
- ▶ Taiwan: Mr Hugo LAI <lai.hugo@msa.hinet.net>
- ▶ Thailand: Dr Thosapon KATEJANEKARN <thosaponk@hotmail.com>



## REGION XIII AREA ASSIGNED MEMBERS (AAM)

|                | 2021-2022   | 2020-2021   |
|----------------|-------------|-------------|
| Hong Kong      | 773         | 757         |
| Indonesia      | 94          | 108         |
| Japan          | 214         | 210         |
| Macau          | 86          | 90          |
| Malaysia       | 207         | 218         |
| Philippines    | 170         | 181         |
| Singapore      | 337         | 341         |
| South Korea    | 87          | 86          |
| Taiwan         | 117         | 117         |
| Thailand       | 75          | 96          |
| <b>TOTAL =</b> | <b>2160</b> | <b>2204</b> |

# 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

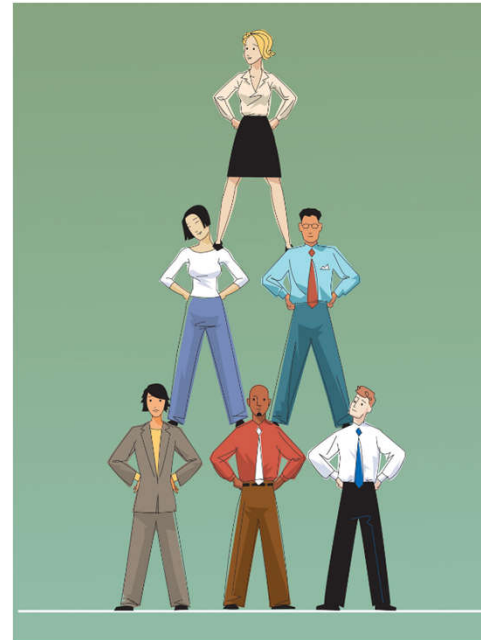
- **YOUR Ultimate Goal**

**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 ORGANIZATION

The image features a white background with a decorative graphic on the right side. The graphic consists of several overlapping, semi-transparent geometric shapes in shades of blue and green. The text "ASHRAE ORGANIZATION" is centered on the left side of the page in a blue, sans-serif font.

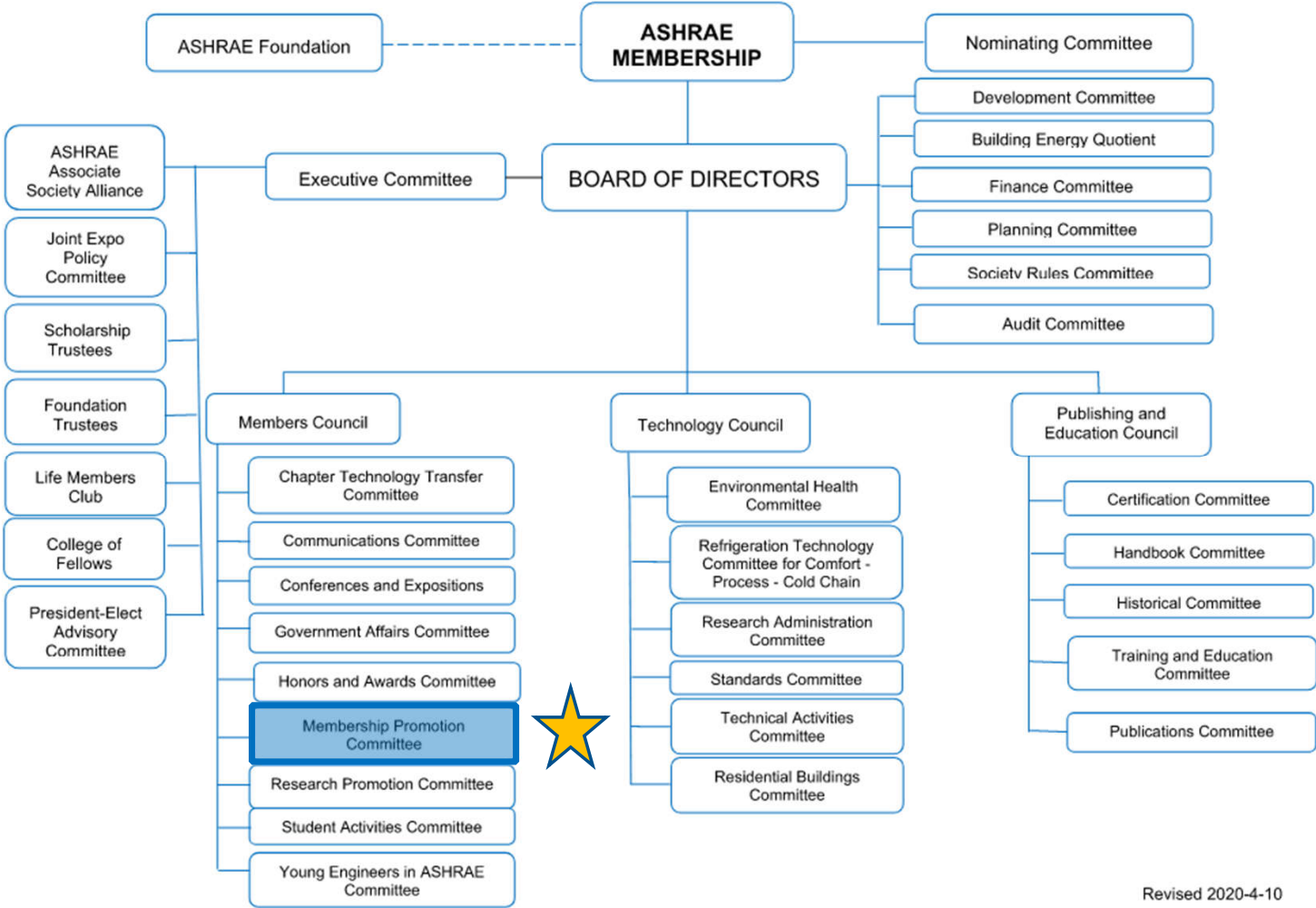
# ASHRAE FACTS

- “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



# SOCIETY ORGANIZATION



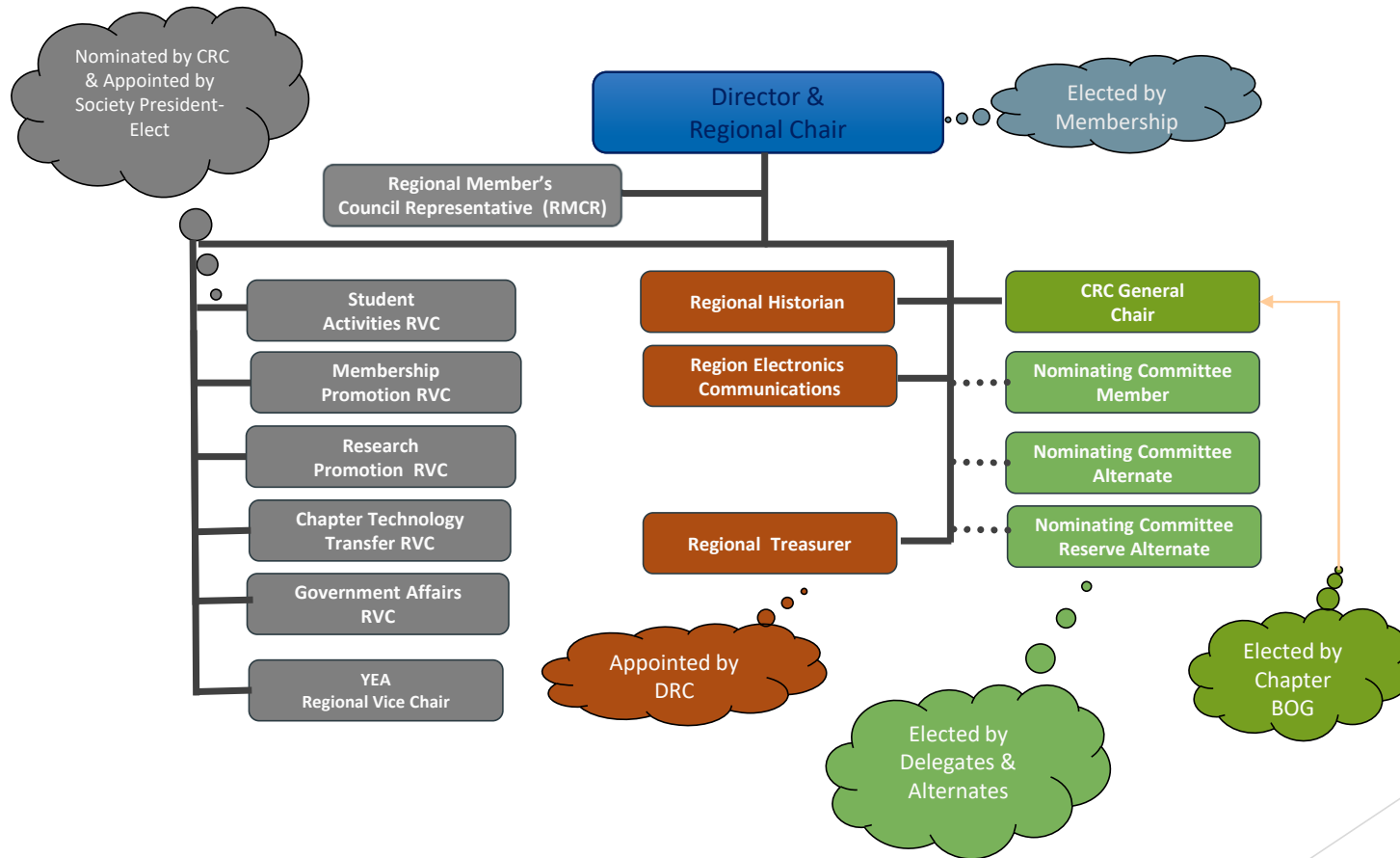
# ASHRAE REGIONS

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



## 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](mailto:DGurley@ashrae.org)



Jeanette McCray  
Assistant Manager,  
Membership  
Tel: 678-539-1178  
[JMccray@ashrae.org](mailto:JMccray@ashrae.org)



## WEBSITES

### MP Training Central

[mptraining.weebly.com](http://mptraining.weebly.com)

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

### ASHRAE

[www.ashrae.org](http://www.ashrae.org)

MP REPORTS  
FOUND HERE!!

### Facebook

[www.facebook.com/ASHRAEupdates](http://www.facebook.com/ASHRAEupdates)

ASHRAE NEWS &  
EVENTS!

### ASHRAE Marketing Central

[www.ashrae.org/marketing](http://www.ashrae.org/marketing)

TOOLKITS &  
SWAG HERE!

## RESOURCES

### Manual for Chapter Operations

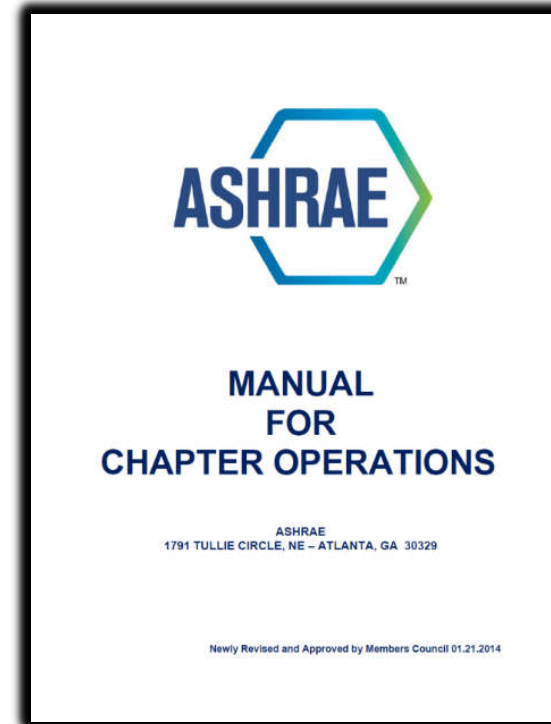
- MP Chair Responsibilities
- Membership

### Rules of the Board

- Membership Grades

### ASHRAE Bylaws

- Dues



# MEMBERSHIP GRADES

The background features a series of overlapping, semi-transparent triangles in various shades of blue and green. The colors range from light, airy blues and greens to deep, saturated blues and forest greens. The triangles are arranged in a way that creates a sense of depth and movement, with some shapes appearing to be layered on top of others. The overall effect is a modern, geometric aesthetic.

## MEMBERSHIP GRADES

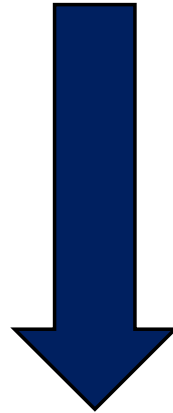
- Student Member
- Affiliate Member
  - Under 30 years old
  - New to ASHRAE
  - Limited to 3 years
- Associate Member
  - Less than 12 approved years
- Full Member
  - 12 Society approved years

- 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:**

|                                                                                                                                            |    |                                                                                                                                              |    |                                                                                                                                                           |
|--------------------------------------------------------------------------------------------------------------------------------------------|----|----------------------------------------------------------------------------------------------------------------------------------------------|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>eLearning Course</p>  <p><b>150</b> to select from</p> | OR | <p>ASHRAE Standard</p>  <p><b>100+</b> to choose from</p> | OR | <p>ASHRAE Handbook</p>  <p>PDF version of the most recent Handbook</p> |
|--------------------------------------------------------------------------------------------------------------------------------------------|----|----------------------------------------------------------------------------------------------------------------------------------------------|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------|

- 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: 1year/year of school (2 min.)
    - Graduates: 1.5years/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:**

|                                                                                                                                            |    |                                                                                                                                              |    |                                                                                                                                                           |
|--------------------------------------------------------------------------------------------------------------------------------------------|----|----------------------------------------------------------------------------------------------------------------------------------------------|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>eLearning Course</p>  <p><b>150</b> to select from</p> | OR | <p>ASHRAE Standard</p>  <p><b>100+</b> to choose from</p> | OR | <p>ASHRAE Handbook</p>  <p>PDF version of the most recent Handbook</p> |
|--------------------------------------------------------------------------------------------------------------------------------------------|----|----------------------------------------------------------------------------------------------------------------------------------------------|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------|

- 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

➔ **11 Years Experience!**

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”



Identify  
"Members"

## 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 World Bank
- Dues – Approximately 50% reduced fee

|             | Regular         | Developing Economies |
|-------------|-----------------|----------------------|
| Student     | \$25            | \$15                 |
| Affiliate   | \$60/\$85/\$115 | \$35/\$50/\$70       |
| Associate   | \$230           | \$135                |
| Full Member | \$230           | \$135                |

# DEVELOPING ECONOMIES - BENEFITS

Visit: <https://www.ashrae.org/membership/member-benefits>

| Benefit                            | Student                             | Affiliate         | Associate & Full Member |
|------------------------------------|-------------------------------------|-------------------|-------------------------|
| Handbook                           | No<br>\$39/\$54<br>(Online/Printed) | No<br>15% Off PDF | PDF Only                |
| Publication Discounts              | Yes                                 | Yes               | Yes                     |
| ASHRAE Journal                     | Digital Only                        | Digital Only      | Digital Only            |
| Hold Office & Vote                 | No                                  | No                | Yes                     |
| eSociety & HVAC&R Newsletter       | Yes                                 | Yes               | Yes                     |
| High Performance Building Magazine | Yes                                 | Yes               | Yes                     |

## 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  $\geq 30$  years **AND** Age  $\geq 65$  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](mailto:membership@ashrae.org)

# MEMBERSHIP ADVANCEMENTS

## STUDENT → ASSOCIATE MEMBER

### SmartStart Program:

- Transfer from Student Member to Associate Member at reduced rates

- Dues:

|        | Regular | Developing Economies |
|--------|---------|----------------------|
| Year 1 | \$25    | \$15                 |
| Year 2 | \$85    | \$50                 |
| Year 3 | \$115   | \$70                 |

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

[www.ashrae.org/smartstart](http://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](mailto: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](mailto: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

The background features a series of overlapping, semi-transparent triangles in various shades of blue and green. The colors range from light, airy blues and greens to deep, saturated blues and forest greens. The triangles are arranged in a way that creates a sense of depth and movement, with some shapes appearing to recede into the background while others come forward. The overall effect is a modern, clean, and professional aesthetic.

# 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

[ashrae.org/benefits](http://ashrae.org/benefits)

## 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



**150** to select from

OR

ASHRAE Standard



**100+** to choose from

OR

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





March 2021

Alaska Chapter Newsletter  
Hot Gas Bypass

President's Message:

Alaska ASHRAE Members,  
It is hard 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  
receiving. 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.  
Your contributions are always appreciated.

## 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

ASHRAE Regina Chap.

TRIVIA NIGHT AND  
MEMBERSHIP PROMOTION NIGHT



## 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!!!!**



# CONNECTING CORE VALUES: WHAT DO PROSPECTIVE MEMBERS & EMPLOYERS WANT?



*“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

# 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 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](http://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](http://www.ashrae.org/connect)



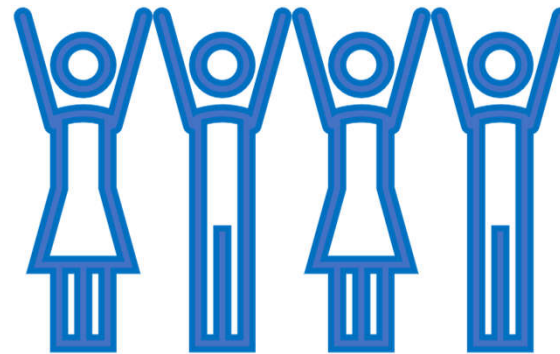
# WHEN THEY JOIN

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](http://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!

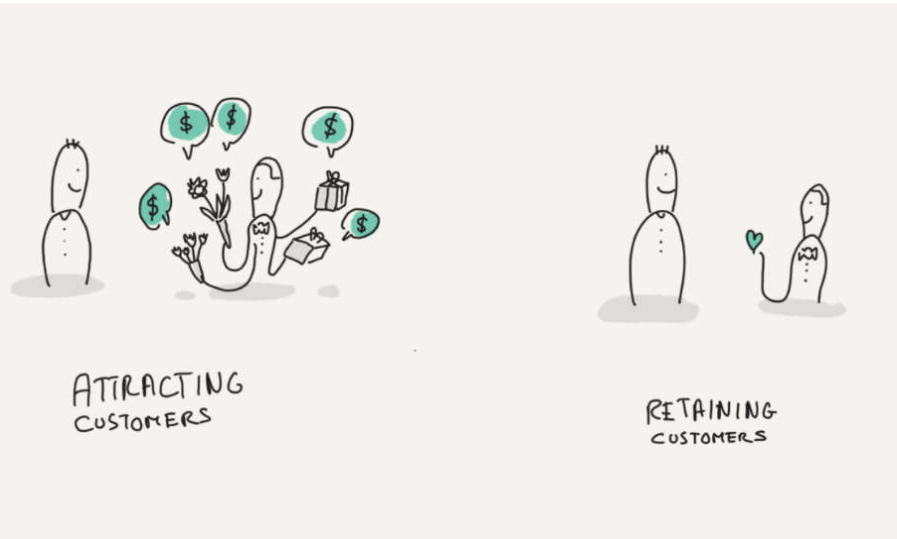


OTHER IDEAS?

RETENTION



# RETENTION



“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





## RETENTION: MP CHAIR'S JOB



# MAINTAIN VALUE!!!

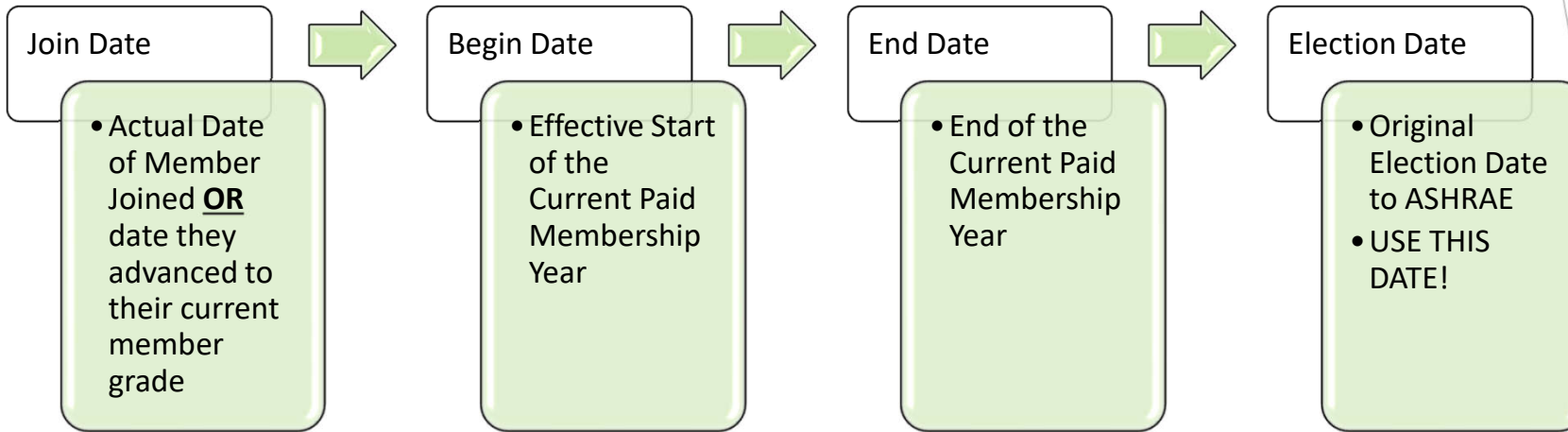
### REMIND

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

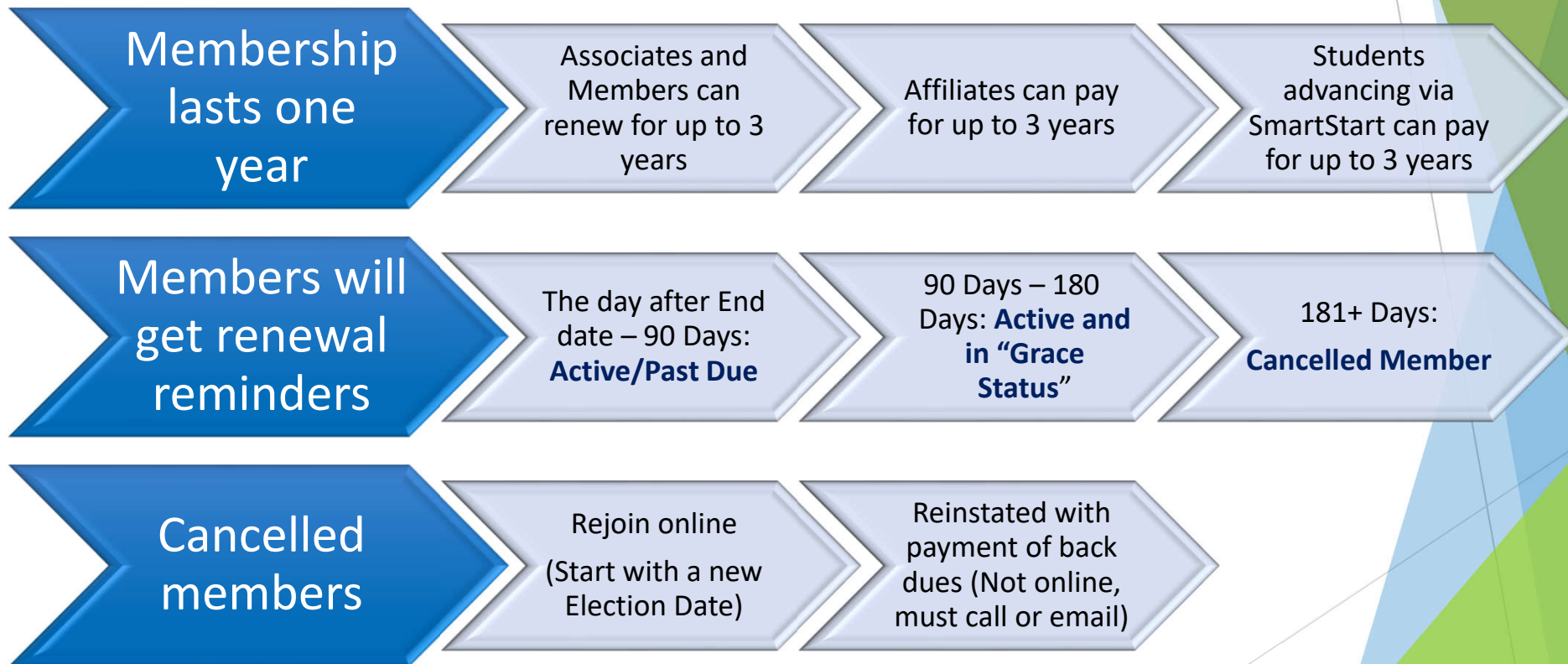
# MEMBERSHIP CYCLE



## Example:

| Member No | Member Type | Join Date  | Begin Date | End Date   | Election Date | Member Status |
|-----------|-------------|------------|------------|------------|---------------|---------------|
| 8170618   | Member      | 2010-04-14 | 2020-05-01 | 2021-04-30 | 2010-05-01    | Active        |
| 8186998   | Associate   | 2011-01-10 | 2020-02-01 | 2021-01-31 | 2011-02-01    | Active        |

# MEMBERSHIP CYCLE



# 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?

