ASHRAE Region XIII RPM-2 (2021-2022) Virtual Membership Promotion (MP) Workshop for President-Elect (PE) Training
12 Jun 2022 (Sun)

Ir Dr. Sam C. M. Hui
Regional Vice Chair – Membership Promotion
sam.cmhui@gmail.com
AGENDA

Membership Promotion (MP) Matters
  - Member numbers
  - PAOE
  - Centralized Training (CT)

What does the MP Chair Do?
  - Recruitment + Retention

Membership Cycle
  - Renewal, Rejoin
Region XIII Chapter President-Elect (2021-2022)

- Hong Kong: Mr Joe CHOW <joe.ashrae@gmail.com>
- Indonesia: Mr Yongkie TILENO <yongkiet@gmail.com>
- Japan: Mr Susumu HORIKAWA <horikawa@nikken.jp>
- Macau: Mr Vincent Siu Hung WONG <vincentwong001@gmail.com>
- Malaysia: Mr Tone Vei TEE <tee.tv@intrixgroup.com>
- Philippines: Dr Mark Christian E MANUEL <mcemanuel.mapua@gmail.com>
- Singapore: Dr Junjing YANG <junjing.yang@gmail.com>
- South Korea: Prof Minki SUNG <minki.sung@gmail.com>
- Taiwan: Dr Hung-Wen LIN <lhw@itri.org.tw>
- Thailand: Mr Pidchapad KIDKIRDSANG <pidchapad.kidkirdsang@gmail.com>
REGION XIII MP CHAPTER CHAIRS (2021-2022)

- Hong Kong: Mr KWOK Yat Sing Jason <jasonyskwok@gmail.com>
- Indonesia: Mr Egi Al GHIFARI <egi.alghaifari@gmail.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>

(Update: May 2022)
<table>
<thead>
<tr>
<th>Region</th>
<th>1 Jul 2021</th>
<th>16 Oct 2021</th>
<th>2 Jun 2022</th>
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<tr>
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<td>820</td>
<td>812</td>
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<td>130</td>
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<tr>
<td>CAR ASHRAE Beijing Group</td>
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<tr>
<td>CAR ASHRAE Shanghai Group</td>
<td>25</td>
<td>25</td>
<td>25</td>
</tr>
<tr>
<td>Region XIII - Other</td>
<td>558</td>
<td>557</td>
<td>554</td>
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<tr>
<td><strong>Region XIII TOTAL =</strong></td>
<td><strong>3195</strong></td>
<td><strong>3184</strong></td>
<td><strong>3145</strong></td>
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* Numbers include Members and Students for paid and non-paid.
WEBPAGE FOR MEMBERSHIP PROMOTION (MP) ON R13 WEBSITE

http://ashrae-region13.org/MP.htm
## PAOE Membership Promotion (2 Jun 2022)

<table>
<thead>
<tr>
<th>Country</th>
<th>2021-2022 AAM</th>
<th>MP PAOE (Oct 2021)</th>
<th>MP PAOE (Jun 2022)</th>
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<tr>
<td>Hong Kong</td>
<td>773</td>
<td>750</td>
<td>1100</td>
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<tr>
<td>Indonesia</td>
<td>94</td>
<td>500</td>
<td>810</td>
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<tr>
<td>Japan</td>
<td>214</td>
<td>300</td>
<td>225</td>
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<td>Macau</td>
<td>86</td>
<td>450</td>
<td>1295</td>
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<td>Malaysia</td>
<td>207</td>
<td>650</td>
<td>2050</td>
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<td>Philippines</td>
<td>170</td>
<td>500</td>
<td>1075</td>
</tr>
<tr>
<td>Singapore</td>
<td>337</td>
<td>550</td>
<td>950</td>
</tr>
<tr>
<td>South Korea</td>
<td>87</td>
<td>275</td>
<td>300</td>
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<td>Taiwan</td>
<td>117</td>
<td>475</td>
<td>875</td>
</tr>
<tr>
<td>Thailand</td>
<td>75</td>
<td>275</td>
<td>550</td>
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<td><strong>TOTAL =</strong></td>
<td><strong>2160</strong></td>
<td></td>
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(PAOE: Minimum 1000; PAR 1600)
## PAOE Membership Promotion (1 of 2)

<table>
<thead>
<tr>
<th>Efficient Use of Volunteers Time</th>
<th>Points</th>
</tr>
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<tbody>
<tr>
<td>If Society membership delinquencies in chapter are 5% or less of total Chapter Area Assigned Members at the end of each month</td>
<td>25 points/month (300 pts max)</td>
</tr>
<tr>
<td>MP event at a chapter meeting</td>
<td>100 points/event (300 pts max)</td>
</tr>
<tr>
<td>Separate social event</td>
<td>25 points/event (50 pts max)</td>
</tr>
<tr>
<td>Retention of each new member (dues paid 2nd and 3rd year) (<strong>AUTO</strong>)</td>
<td>25 points/member (300 pts max)</td>
</tr>
<tr>
<td>Member who rejoins or is reinstated after being cancelled for more than one year (<strong>AUTO</strong>)</td>
<td>50 points/member (no max)</td>
</tr>
<tr>
<td>Recognition of new members and advancements at chapter meetings</td>
<td>5 points/member (50 pts max)</td>
</tr>
<tr>
<td>Each non-member invited and who attends a chapter meeting</td>
<td>10 points/person (150 pts max)</td>
</tr>
<tr>
<td>MP Chair and Chapter Officers are from 3 or more industry classifications</td>
<td>50 points</td>
</tr>
</tbody>
</table>
## PAOE Membership Promotion (2 of 2)

<table>
<thead>
<tr>
<th>RVC Assigns</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>50 points per 0.5% growth in membership at the end of fiscal year above starting point</td>
<td>25 points/0.5% growth (no max)</td>
</tr>
<tr>
<td>Incoming Chapter Membership Promotion committee chair or co-chair attending the MP CRC workshop</td>
<td>100 points</td>
</tr>
<tr>
<td>Incoming Chapter Membership Promotion committee chair or co-chair attending the MP Centralized Training</td>
<td>100 points</td>
</tr>
<tr>
<td>Chair or Co-Chair have been on the committee for 2 years or more</td>
<td>50 points/chair (100pts max)</td>
</tr>
<tr>
<td>Planning and goal setting session with RVC and chapter MP committee members</td>
<td>50 - 100 points</td>
</tr>
<tr>
<td>Achieving goals established in goal-setting session with RVC (assigned by June 30)</td>
<td>10 – 100 points</td>
</tr>
<tr>
<td>Membership Promotion Committee size is 5 or 3% of chapter members (whichever is less as of June 30*) with dedicated committee members serving as the Recruitment Chair, and/or Retention Chair</td>
<td>25 – 100 points</td>
</tr>
</tbody>
</table>
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!!!
2022-2023 Membership Promotion Centralized Training

- 26 Jun 2022 (Sun) 8 a.m. to 4 p.m. (EST) Centralized Training (in person)
- Hilton Toronto, 145 Richmond St W, Toronto, ON M5H 2L2
  - This will be the only in person Centralized Training offered for the 2022-2023 Society Year. All Regions are invited.
- 22 Jul 2022 (Sat) 5 a.m. to 9 a.m. (EST) Virtual Centralized Training offered for Region XIII, XIV and Region at Large
  - [https://attendee.gotowebinar.com/register/2260366532271680781](https://attendee.gotowebinar.com/register/2260366532271680781)
  - MP Chairs only need to attend one session.
**REMINDERS**

- Current MP Chairs or Chapter Officers should check and input the PAOE points for MP before the end of June and follow up on:
  - Member retention, rejoin/reinstate
  - Membership delinquencies
  - Membership promotion events
  - Recognition of new members and advancements

- Incoming Chapter MP Chairs should attend the Centralized Training (June or July) and MP CRC Workshop (August)
  - Should consider/invite suitable people to join the MP chapter committee
  - Prepare the MP planning and goal setting for the next fiscal 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

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
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!
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

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
- ASHRAE Standard: 100+ to choose from
- 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!!!!!
MEMBERSHIP CYCLE

Example:

<table>
<thead>
<tr>
<th>Member No</th>
<th>Member Type</th>
<th>Join Date</th>
<th>Begin Date</th>
<th>End Date</th>
<th>Election Date</th>
<th>Member Status</th>
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<tr>
<td>8170618</td>
<td>Member</td>
<td>2010-04-14</td>
<td>2020-05-01</td>
<td>2021-04-30</td>
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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>
</tr>
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MEMBERSHIP CYCLE

Membership lasts one year

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!
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
Thank you!

Q & A