



***RP* 2022-23**
Training Manual

YOUR RP CAMPAIGN STAFF!

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TABLE OF CONTENTS

I. Overview

| | |
|----------------------------------|----|
| Structure Charts | 7 |
| Past RP Campaign Results | 9 |
| Official 501(c)(3) Receipt | 11 |
| Presidential Award of Excellence | 12 |
| Instructional Videos | 17 |

II. Funds of the RP Campaign

| | |
|---------------------|----|
| Last Year's Results | 19 |
| Funds 101 | 21 |

III. RP Chair Role Details

| | |
|------------------------|----|
| Chapter Campaign Goals | 43 |
| RP Campaign Concepts | 44 |
| Donor Recognition | 47 |
| RP Chair Action Items | 51 |
| RP Campaign Reports | 54 |
| Making the Ask | 57 |

IV. First Week of the Month

| | |
|--------------------------------|----|
| Donor Reports | 64 |
| Thank You Notes | 67 |
| Chapter Newsletter and Webpage | 68 |

| | |
|--------------------------------------|-----|
| V. Second Week of the Month | 71 |
| Volunteer Committee | 75 |
| 10 Year History Report | 77 |
| Donor Call Sheets | 79 |
| | |
| VI. Third Week of the Month | 81 |
| Submitting Gifts | 85 |
| Summary Forms | 87 |
| Online Gift Form | 88 |
| High Five and Challenge Goals | 89 |
| | |
| VII. Fourth Week of the Month | 91 |
| Special Events | 95 |
| Ordering Items | 99 |
| | |
| VIII. Important Forms | 101 |
| Gift Summary | 103 |
| Campaign Order Form | 104 |
| Full Circle Worksheet | 105 |
| Volunteer Committee | 106 |
| IRS 501(c)(3) Status | 107 |
| Donor Call Sheet | 108 |
| Endowment Form | 109 |
| Donor Recognition | 110 |

Kick Start Action Plan

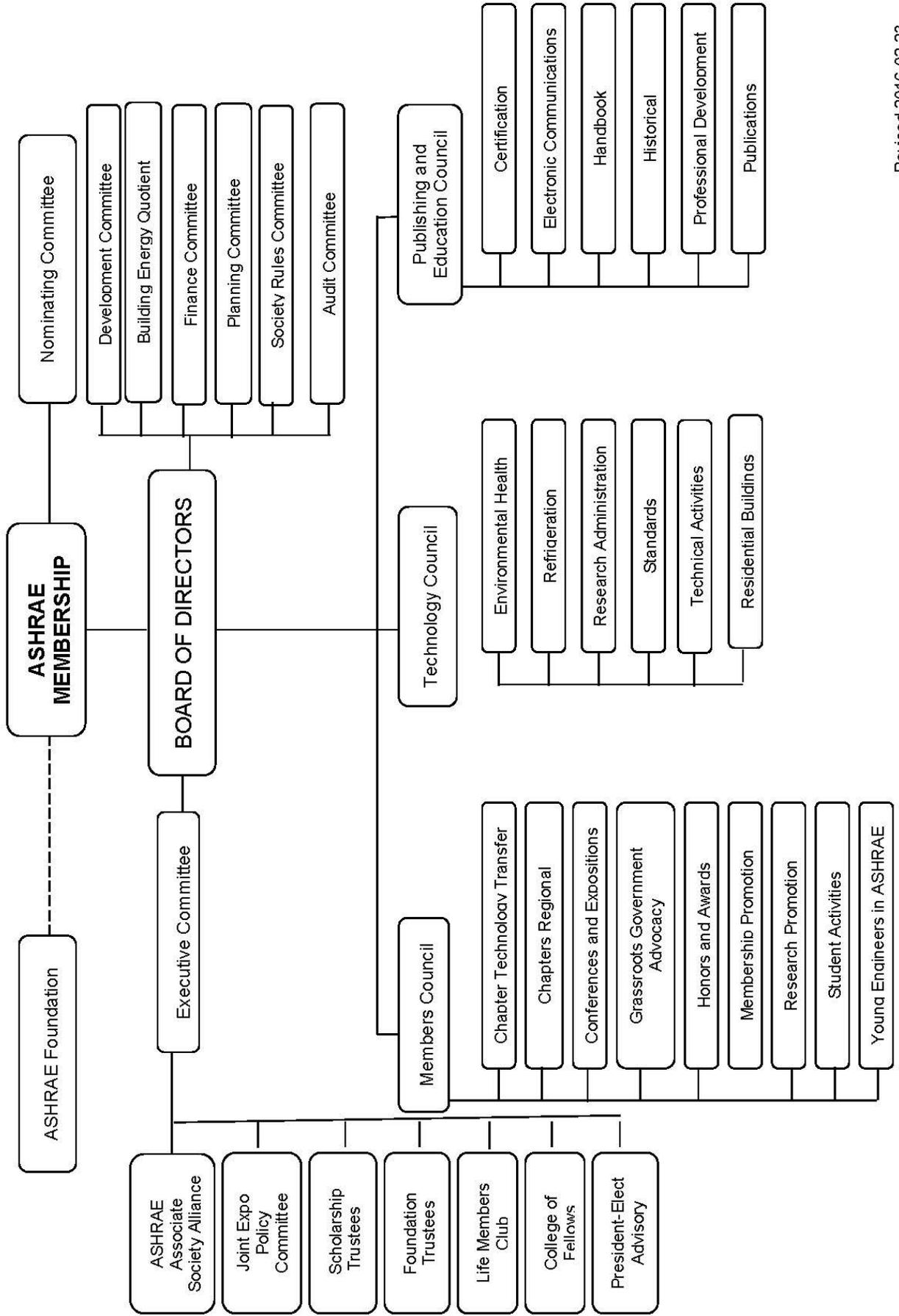
Five things to do before or immediately after you leave training!

- Ensure the RP Campaign is part of your **chapter webpage**, **chapter calendar**, and **newsletter**
- Schedule **donor recognition meeting**.
- Form your **volunteer committee**
- Contact Board of Governors (BOG) for **Full Circle gifts**
- Integrate your personal, chapter, and RP **calendars**

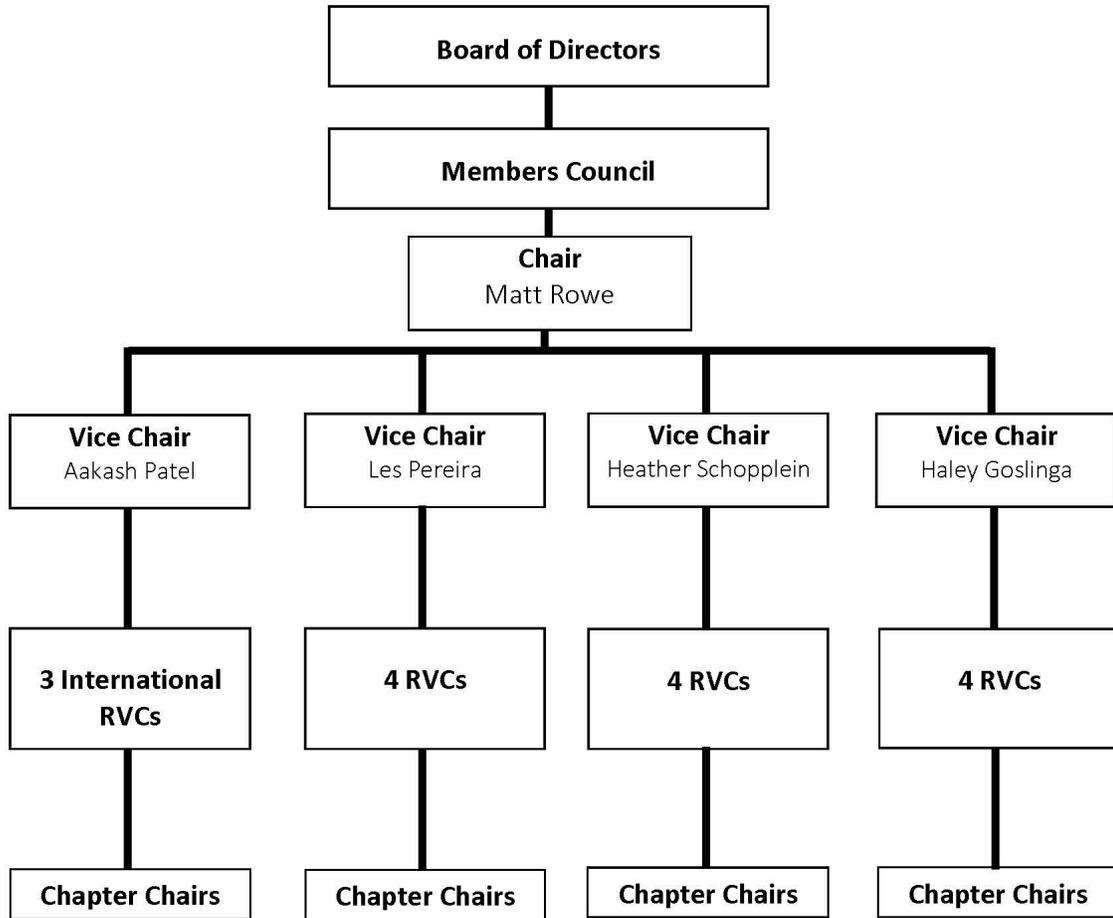




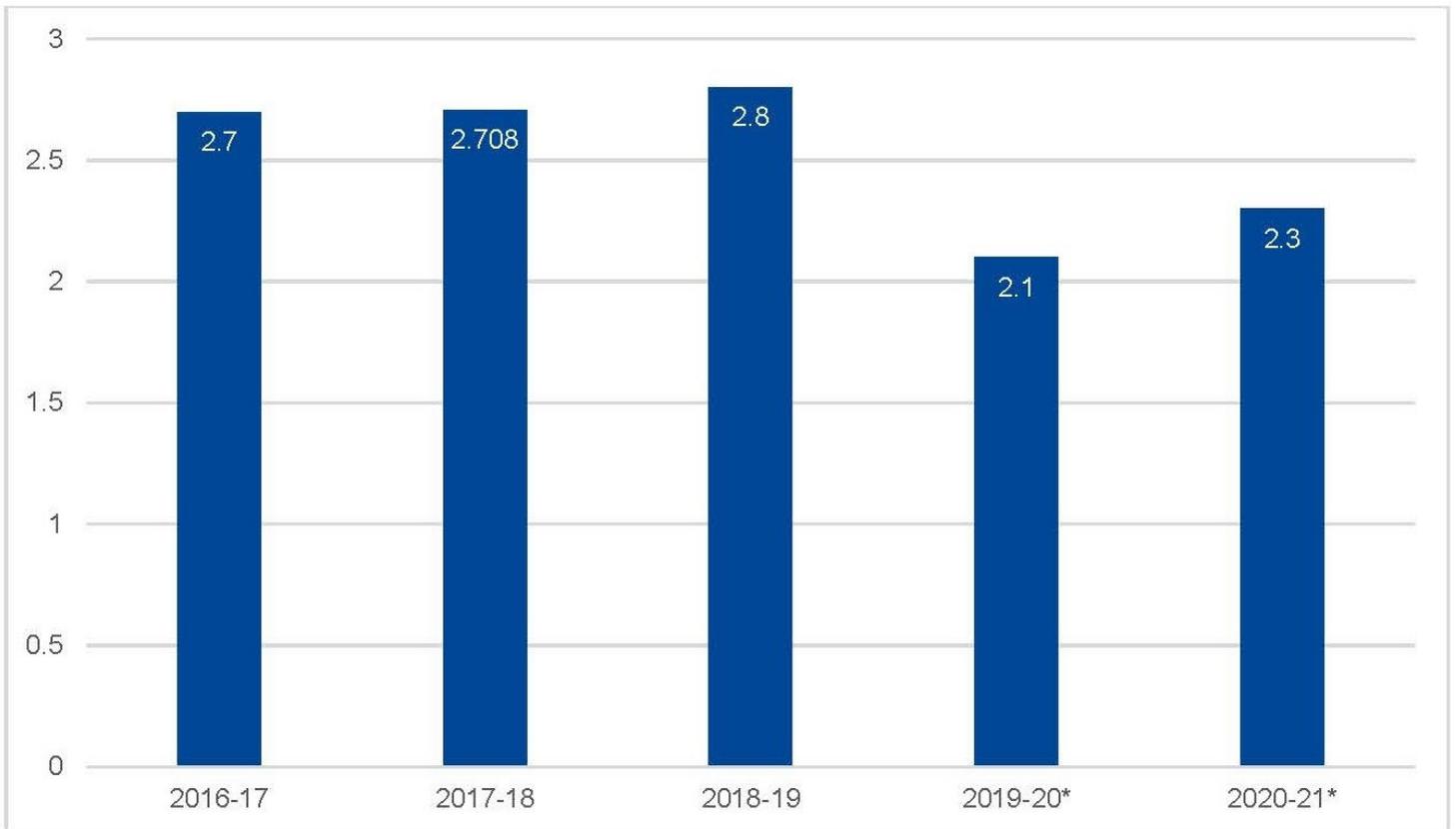
ASHRAE STRUCTURE



ExCom
Region
Chapter



RP Campaign Results (in millions)



The 2021-22 total was: _____

Official Tax Receipt and Thank You Letter

- ASHRAE is a 501(c)(3) US organization.
- ASHRAE Research Canada is not a registered charity in Canada for individual gifts.
 - * Canadian corporations may be able to deduct contributions to ARC as a contribution to a professional association providing direct support to the industry.
- All donors should be encouraged to check with their own tax professionals to be clear on their regulations.
- Official tax receipts and thank you notes are mailed processed and mailed from Headquarters.



Presidential Award of Excellence (PAOE) Points

The Presidential Award of Excellence is a way for you and your chapter to be recognized for all of your hard work on behalf of the RP Campaign!

Because this committee ***raises money, not points*** we have a very simple philosophy on PAOE - If you meet goal and complete all of your required tasks, you will have more than enough points to make your President happy!

Staff is in charge of tracking, calculating, and inputting PAOE for the chapters. Please keep Staff up to date with the activities and events taking place in your chapter.

The opposite page is the RP PAOE worksheet for 2022-23.



2022-23 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

| MINIMUM: 800 POINTS | | RP CATEGORY (STAFF ASSIGNS POINTS) | PAR: 1050 POINTS |
|--|---|---|-------------------------|
| Efficient use of volunteers' time: | | | |
| GOAL: Contributions considered towards a chapter <i>Goal</i> include gifts to ASHRAE, YEA ASHRAE Learning Institute, ASHRAE Research, and Scholarships held by the ASHRAE Foundation. | | | |
| EXCEPTIONS: Foundation gifts made as part of routine ongoing Foundation Solicitations. A chapter's <i>Goal</i> shall be set by each Region's DRC. | | | |
| Option 1: | | | |
| RP1 | 10 points; (1000 points maximum) | Earned by a chapter for each 1% of <i>Goal</i> attained – (100% of <i>Goal</i>) | OR |
| Option 2: | | | |
| RP2 | 10 points | Earned for each dollar per area assigned member attained | |
| RP3 | 20 additional points; (3000 points maximum) | For each dollar per area assigned member collected above the Society dollar per member Goal of \$75 | |
| RP4 | 50 points; (50 points maximum) | For Volunteer Committee Worksheet completed by October 15 and sent to RVC and Staff. A minimum of 3 additional chapter members should comprise the RP Volunteer Committee | |
| RP5 | 25 points; (25 points maximum) | For formal recognition of all Honor Roll level contributors from the prior year's campaign before December 31 (Note: <i>Recognition items must be ordered from headquarters by September 1 to qualify</i>) | |
| RP6 | 100 points; (100 points maximum) | For Chapter Full Circle Award (by November 15) | |
| RP7 | 10 points | Per Chapter BOG member who contributes at the Full Circle level by November 15, helping the Chapter achieve "Full Circle Plus." These points are only given if the Chapter completes the Chapter Full Circle. | |
| RP8 | 100 points; (100 points maximum) | 100 points for meeting or exceeding 30% of Goal by December 1 | |
| RP9 | 25 points; (100 points maximum) | For the RP promotional chapter meeting held after December 31 (Note: 25 points for RP promotion and 25 points for promotion of Research/RAC) | |
| RP10 | 100 points; (100 points maximum) | For workshop attendance by current RP chair or RP co-chair (as listed on chapter roster) at an RP Committee approved RP training workshop | |
| RP11 | 100 points; (100 points maximum) | For attendance by the current RP Chair or RP co-chair (as listed on chapter roster) at the CRCs minimum 2 hour RP workshop if Centralized Training is also attended | |
| RP12 | 50 points; (50 points maximum) | For meeting or exceeding scholarship goal (by March 31) | |
| RP13 | 100 points (100 points maximum) | For a succession plan for RP chair submitted to RP Staff and RVC by April 1 | |
| RP14 | 300 points; (300 points maximum) | For chapters who have reached goal (based on receipts at headquarters) by June 15 | |
| RP15 | 300 points; (300 points maximum) | For reaching Challenge Goal (105% of High Five or 120% Goal) | |
| RP16 | 250 points | For each new Golden Circle level or higher investment acquired and credited to the chapter (as determined by the RVC & RP ExCom guidelines). | |
| RP17 | 200 points; (200 points maximum) | Apex Award | |
| RP18 | 150 points | For each renewed Golden Circle or higher investment acquired and credited to the chapter (as determined by the RVC & RP ExCom guidelines) | |
| RP19 | 100 points | For new High Five level of contributions | |
| RP20 | 50 points (no maximum) | Per Special Event held by a Chapter where over 75% of profits are donated to the RP Campaign. (To qualify as a Special Event profits must meet or exceed \$500 for in-person events; \$100 for virtual events.) | |
| RP21 | 50 points (no maximum) | For each endowed contribution (\$1,000 minimum) | |
| RP22 | 10 points (no maximum) | Per \$ per/member for chapters who meet or exceed \$50 per/member and reach or exceed Goal | |
| RP23 | 200 points; (200 points maximum) | For meeting or exceeding 60% of Goal by March 31 | |
| RP24 | 50 points; (200 points maximum) | Per 10% growth in number of donors at the end of fiscal year above starting point | |
| RP25 | 50 points; (50 points maximum) | For communicating current list of research projects in your region via chapter website, newsletter, social media, or other form of communication | |

Earning Points

So how do you earn PAOE points? Other than making Goal, the following activities will help you rack up the points!

- July 1 - June 30
 - Host a Special Event (50 pts)
- October 15
 - Volunteer Committee (15 pts)
- November 15
 - Full Circle (100 pts)
 - Full Circle Plus (10 pts+)
- December 1
 - Reaching 30% of Goal (100 pts)
- December 31
 - Formal recognition of Donors (25 pts, *if ordered by Sept. 1*)
- January 1 - June 30
 - RP Promotional Night (50 pts)
- March 31
 - Scholarship Goal (50 pts)
 - Reaching 60% of Goal (200 pts)
- April 1
 - Succession Plan (100 pts)
- June 15
 - Reaching 100% of Goal (300 pts)

Earning Points

A few definitions to help you better understand RP PAOE:

Goal: Set by DRC and RVC for each chapter

High Five: The largest amount of money for your chapter over a five year period

Challenge Goal: A chapter's High Five (the highest amount raised in five years) plus 5%, or 120% of goal (whichever is lower)

Scholarship Goal: Portion counted toward the chapter's overall RP goal and specifically earmarked for ASHRAE scholarships.

Dollars Paid per Member: Total dollars raised divided by a chapter's number of assigned members

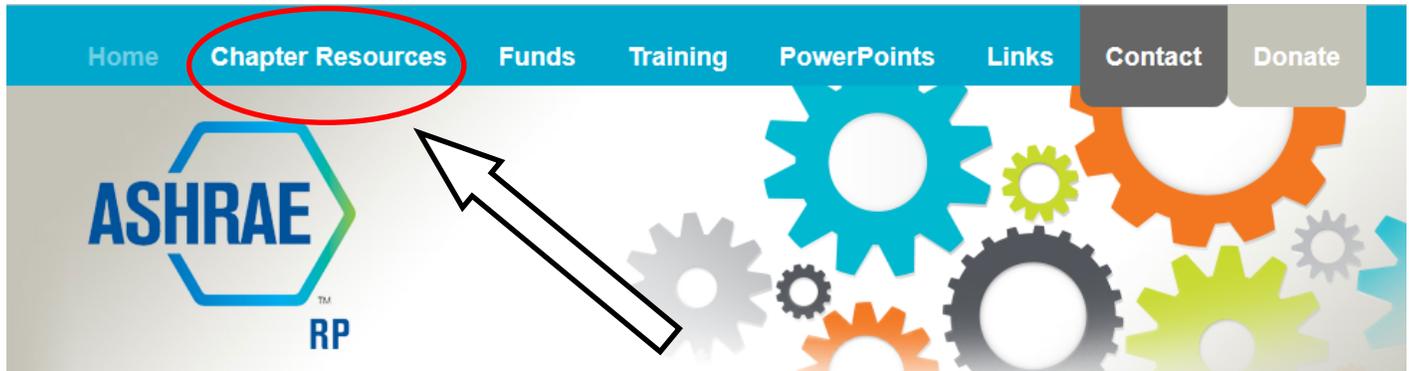
Percentage of Goal: Chapter's total dollars raised divided by their assigned goal

Percentage of High Five Goal: Chapter's total dollars raised divided by their High Five Goal

APEX Award: Awarded to chapters which have set new record highs for their campaign for four of the past five consecutive years

Not sure how to do something?

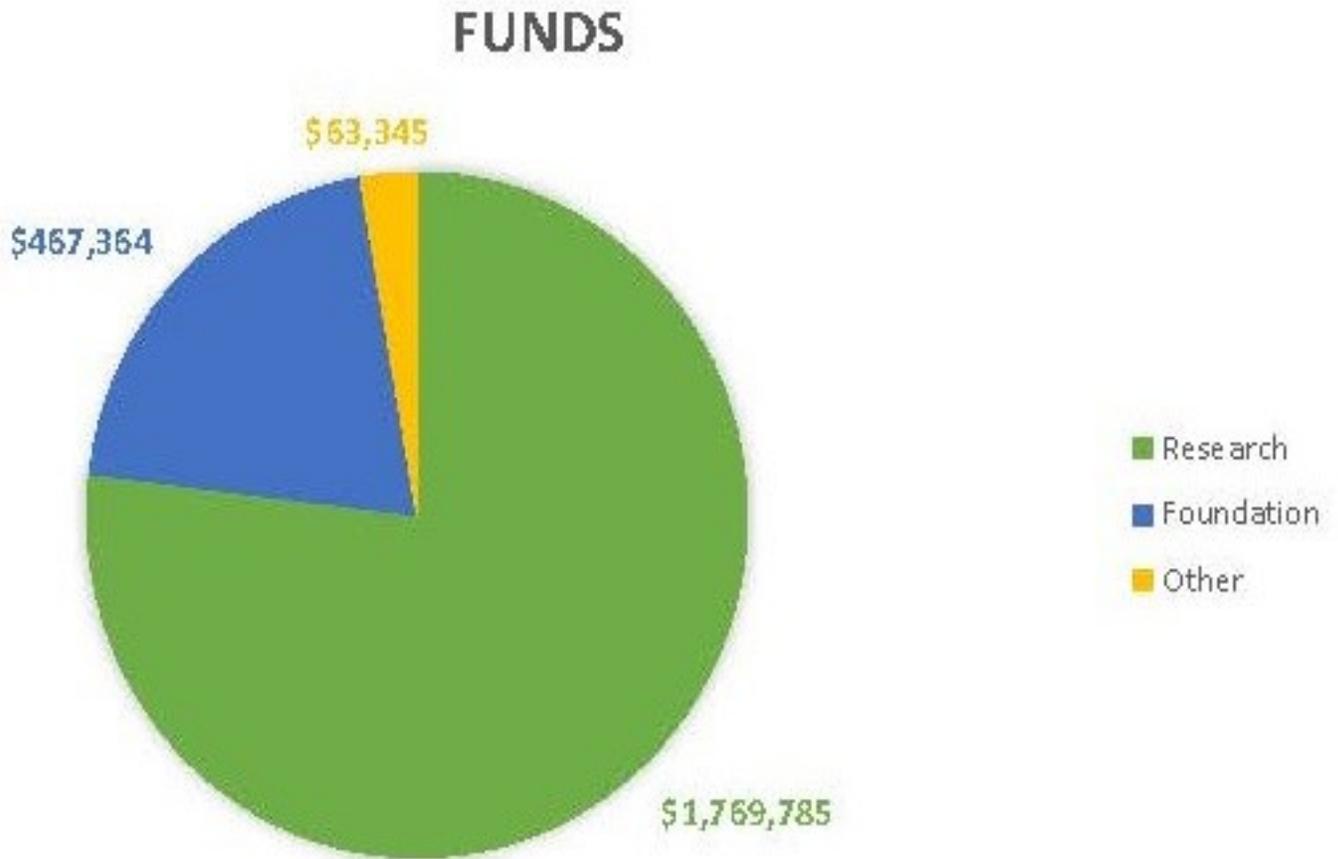
Check out the instructional videos on www.ashraerp.com, under Chapter Resources!



- How to send in checks
 - Run donor reports
- Read the monthly spreadsheet
 - Sort excel
 - Complete a mail merge
- Navigate the ASHRAE and ASHRAE RP webpages

*And you can always contact RP Staff and ask!
rp@ashrae.org*

Supporting the Various Funds of ASHRAE



The Funds of the RP Campaign

- **Research:** Funds the backbone of ASHRAE standards, handbooks and every publication of the industry
- **YEA:** Engages members 35 or younger in ASHRAE with professional and personal development
- **Education:** (ALI - ASHRAE Learning Institute): Supports the ongoing continuing education of members
- **RP General Fund:** Provides unrestricted support to various ASHRAE programs in all areas
- **ASHRAE Foundation Endowed Funds:** Provides a legacy of support for ASHRAE. Support for any fund may be endowed
- **ASHRAE Scholarships:** Promotes ASHRAE and encourages students to enter the industry

Fund specific information, flyers, and PowerPoint presentations may be found on www.ashraerp.com

Contact RP Staff for ideas on how to share this information with your chapter during your RP Night.

Examples of some of the fund specific PowerPoint presentations found on www.ashraerp.com



ASHRAE Research 101

What is the ASHRAE Research Program?

Funded by ASHRAE, this program governs more than 80 investigative projects around the world. It is supported by more than 100 member-led Technical Committees (TCs), each with their own specialty and sub-specialty.

How are the projects selected?

A TC identifies a need (such as missing information, new ideas or processes to be examined, or outdated information), sets a goal, and outlines a project to meet that need and goal. The Research Administration Committee (RAC) reviews and approves the proposed project. It then goes out to “bid”, ensuring that ASHRAE’s financial resources are spent wisely and the final product will meet all stated goals.

How much is spent on research?

With more than 50 projects taking place at any time, the average research budget typically exceeds \$17 million. There is a wide range of budgets for projects. Grants-in-Aid, or projects conducted by graduate students, can have a budget of up to \$10,000. There are also multiple research projects that cost over \$1 million over the three-five year life of the project.

Where can I find specific information about a project?

Check www.ashrae.org/research. RP staff will be happy to put you in touch with the Manager of Research at your request.

For further information, contact RP Staff:

rp@ashrae.org

ASHRAE Research

Mission: To improve the quality of life and to answer tomorrow's questions through research TODAY.

Research Staff:

Mike Vaughn

Senior Manager of Research and Technical Services
mvaughn@ashrae.org
(404)636-8400 ext.1211

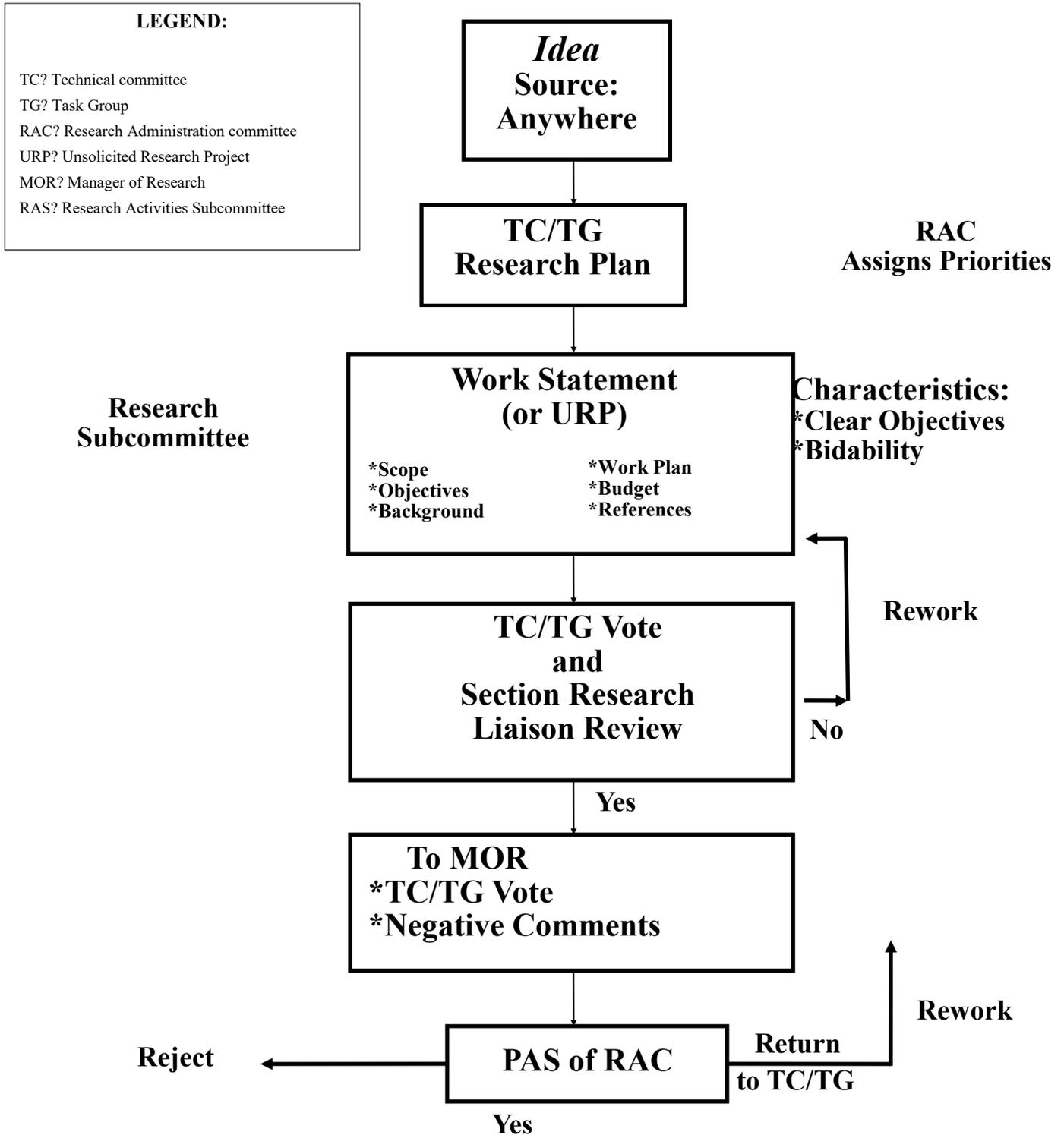
Steve Hammerling

Manager of Technical Services
shammerling@ashrae.org
(404)636-8400 ext.1158

www.ashrae.org/research

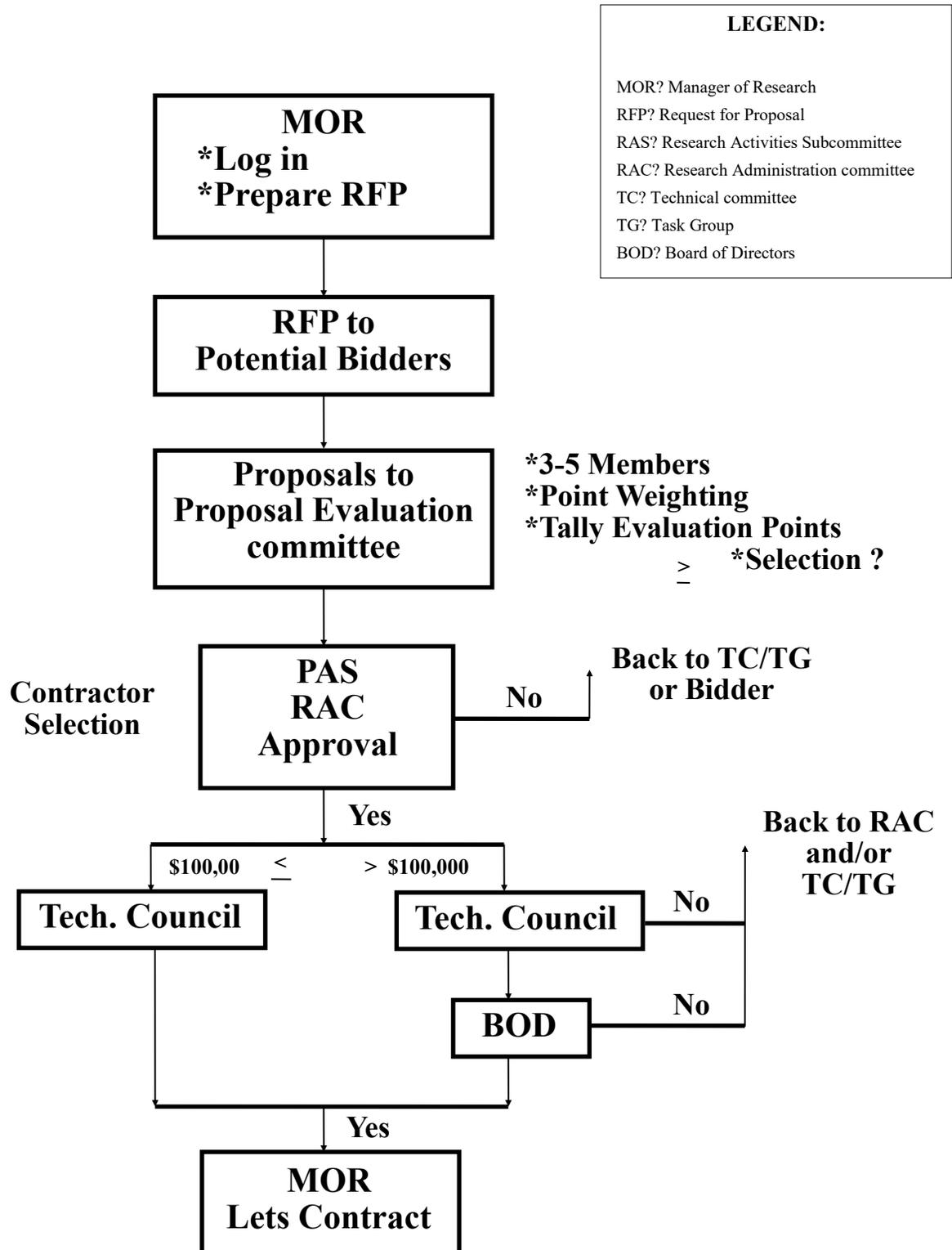
Research

From Idea To Funded Project



Research

From Idea To Funded Project



ASHRAE YEA 101

Young Engineers in ASHRAE

How are the funds donated to YEA used?

The funds you give are used directly to support the professional and ASHRAE-focused career of young ASHRAE Members! Like ASHRAE Research, 100% of your donation goes directly toward YEA's Leadership programs to lower the cost for all participants and constantly improve the programs.

What are the YEA Leadership programs?

Young Engineers in ASHRAE focus on developing the leadership, professional and networking skills of ASHRAE Members 35 and younger. Funds earmarked toward YEA will be applied to YEA Institute programs, which include a variety of educational and professional development opportunities, such as YEA Leadership Weekend, YEA Leadership International, Leadership U, and the HVAC Design Essentials Scholarship.

Why is it important to support the various programs for YEA?

These YEA members are at the beginning of their careers, bringing fresh ideas to their committee and Society. Reaching the "next generation" of engineering leaders is an essential step to keep ASHRAE and its members as a successful leader within the industry.

What skills does YEA Institute give YEA members?

- Society history and benefits
- Leadership development
- Opportunities for resume building
- Communication techniques
- Networking skills and strategies
- Practical workplace strategies



Visit www.ashrae.org/yea for more information on current and upcoming programs!

ALI 101

ASHRAE Learning Institute

What is ALI?

Focused on the continued professional development of ASHRAE members, ALI offers a wide range of professional development seminars and short courses. These seminars and courses provide high-quality, authoritative and credible technical information, with all content developed through ALI's peer-review process. ALI instructors are ASHRAE members, college or university faculty, and/or full-time professional engineers.

How does ALI use donated funds?

Gifts earmarked for ALI support are used in several key ways:

- Development of new materials
- Planning and development of new program offerings
- Underwriting of professional support
- Subsidizing of course, seminar, and certification costs to participants

For further information, contact RP Staff:
rp@ashrae.org

ASHRAE RP General Fund 101

What is the RP General Fund?

This is the catch-all classification used when discussing all of the smaller funds used to support numerous programs of ASHRAE, including:

- Support for special research projects
- Specialized educational publications
- Sustainability projects at the Annual or Winter Conferences,
- YEA Leadership Programs

Can gifts to the RP General Fund be designated to a program?

Of course! We always want to ensure that donors can support the programs they wish. Noting on the check or summary form exactly to which program the money should be designated will allow ASHRAE to utilize the gift properly.

What are the sustainability projects at the two conferences?

These are community-focused projects, selected and supervised by the host chapter at each Annual and Winter Conference.

Past projects include improving the energy efficiency of a homeless shelter, improved IAQ of a school for at-risk children, and updated HVAC systems at a women's shelter. These projects highlight the benefits that ASHRAE, its Members, and the HVAC&R industry bring to the community and serve as a lasting benefit to conference hosts.

For further information, contact RP Staff:

rp@ashrae.org

Endowed Research Funds 101

RP Gifts through the Foundation

What is an endowed gift?

Simply put, “endowed” means that a donor or donors contribute to a named fund via the ASHRAE Foundation. The Foundation invests the funds and provides a 5% annual return, beginning one year after the fund reaches a balance of \$3,000. This income is earmarked for whatever fund the donor wishes.

Why make an Endowed Research Gift?

- It’s an ideal way to secure an Honor Roll level contribution in Perpetuity: 5% of your endowed gift will come back to RP every year!*
- Alternative to traditional Memorial and Honorarium gifts
- Great way for chapters to put large treasuries to work for the Society. Initial gift can be paid incrementally over several years.

How do I establish an Endowed Research Fund?

Since each situation is unique, please contact RP Staff at Headquarters. They will be happy to discuss the chapter or donor’s wishes and make a plan that fits those needs best. It’s a very simple process and should take no more than five minutes to initiate. Call (678) 636-8400 ext. 1114 for more info.

What is the minimum amount required to start or name a Fund?

Individuals

\$3,000 payable over three years to provide a \$150 annual gift to ASHRAE*

Organizations

While the minimum is \$3,000, we encourage organizations to start at \$10,000 payable over three years to provide a \$500 annual gift to ASHRAE (honor roll level)*

** After initial one year period of investment*

Endowed Research Funds 101

RP Gifts through the Foundation

Can more than one donor contribute to a fund?

Certainly! This is an excellent way to encourage new donors for your chapter, especially if the fund is being created in memory of or in honor of a respected member of your chapter or the HVAC&R community. Several chapters have designated specific memorial events where all contributions raised go toward a named Endowed Research Fund.

Are there restrictions on what the fund can be named? What have other chapters named their funds?

We suggest keeping the name of the fund simple and always in good taste. Chapters have named funds after individuals (must be or have been ASHRAE members in good standing) or their chapters. Several suggestions are: *The John Smith Memorial Fund*; *Metro Chapter Past Presidents' Fund*; *New England Chapter Fund*; and *Supporting Refrigeration in Delaware Fund*.

Why not raise \$2 million a year just for the Foundation?

Establishing an Endowed Research Fund creates a permanent gift and helps to ensure that the ever growing needs of research are met. At the same time, the RP Campaign would never want to earmark all funds toward the Foundation because of the immediate needs of research—\$2.5 million annually.

For chapters that wish to give to both RP and an Endowed Research Fund, the recommended split is no more than 50% of the standard chapter donation earmarked toward the endowed fund. This will help ensure that enough funds are available for the immediate use of Research and will still allow the chapter to build up endowed funds over time.

Endowed Research Funds 101

RP Gifts through the Foundation

ASHRAE RP: Endowed Gift

Use this form to give a restricted RP gift via the ASHRAE Foundation

DONOR

Organization Individual

Name: _____ Contributor Number: _____

Address: _____ Phone Number: _____

City, State, Zip: _____

Restricted RP Fund

New Fund Existing Fund

benefiting Research YEA Education General Scholarships

If no fund is selected, the endowed gift will default to Research

Name of Fund: _____

Chapter to Credit: _____

Amount of Gift*: _____

* Please note that the minimum gift amount is \$3,000, payable over 3 years. For gifts less than this amount, please contact staff for details.

- Check enclosed
- Please charge my credit card:

Name on the card: _____

____ American Express ____ MasterCard ____ Visa

Card #: _____ Exp. Date: _____

Credit card contributions may be faxed to (678) 539-2147.

Please send your gift to:

ASHRAE RP
180 Technology Parkway
Peachtree Corners, GA 30092

I understand that this
invested by Foundatio
benefiting the fund no

Signature: _____

Tips:

- Please fill out when **creating a new Endowed Research fund**.
- Can be found on http://ashraerp.com/important_forms.html

Questions? Contact RP Staff!

ASHRAE Scholarships 101

Motivate students and prospective students worldwide to pursue an engineering or technology career in the HVAC&R field by giving to scholarships!

Who can establish a Scholarship?

Scholarships may be established by individuals, companies, regions, chapters, or other appropriate affiliates and must be fully funded within a five-year period. There are three types of scholarships; scholarships named for an individual, ASHRAE Society Scholarships and Chapter Awarded Scholarships.

Scholarships named for an individual

Established with a minimum endowment of \$100,000 and distributes a \$5,000 annual scholarship. The fund and scholarship selection process is managed by the Trustees and may be named by an individual, chapter, region, or company.

ASHRAE Society Scholarships

Established with a minimum endowment of \$60,000 and distributes a \$3,000 annual scholarship. The fund and scholarship selection process is managed by the Trustees and may be named by a chapter or region. There are 46 ASHRAE Society Scholarships administered by the ASHRAE Foundation.

Chapter Awarded Scholarships

Established with a minimum endowment of \$30,000 which distributes a \$1,500 annual scholarship. The fund is overseen by the Trustees and the chapter manages the scholarship selection process. The fund may be named by a chapter. There are 33 Chapter Awarded Scholarships administered by the ASHRAE Foundation.

In 2020-21, ASHRAE awarded \$254,000 in Scholarships!

ASHRAE Scholarships 101

There are many benefits of creating a scholarship with the ASHRAE Foundation, including:

Educate students worldwide who will pursue an engineering or technology career in the HVAC&R field.

Scholarships are crucial for bridging the gap between the increasing cost of tuition and what students and their families are able to afford out of pocket.

Leave a lasting legacy.

The fund is a permanent legacy of support that will carry forward in perpetuity and influence the future.

Assistance with fund management and the scholarship selection process.

When your chapter makes a gift to create an ASHRAE Society Scholarship, professional money managers invest the gift and manage the funds. Your chapter will receive an annual report on the investment performance of your fund. ASHRAE currently has a 5% payout rate across all endowed funds. ASHRAE's Scholarship Trustees will manage the selection of deserving recipients of your chapter's scholarship. Your chapter will have an opportunity to acknowledge them at a chapter ceremony, if desired.

Chapters retain control of the scholarship selection process.

Chapter Awarded Scholarships are invested and administered by the ASHRAE Foundation, however, chapters retain total control over the scholarship recipient process. The ASHRAE Foundation will also provide the "Scholarship Program Guidelines" which includes criteria to be used in the selection process.

For further information, contact RP Staff:

rp@ashrae.org

Campaign Goals

MY REGION'S GOAL: \$ _____

MY 2022-23 RP GOAL: \$ _____

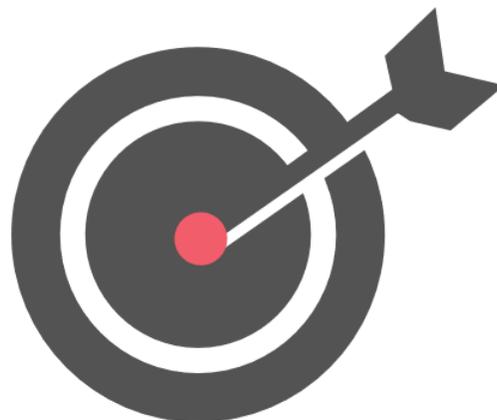
MY DECEMBER 1 GOAL: \$ _____

MY MARCH 31 GOAL: \$ _____

M SCHOLARSHIP GOAL: \$ _____

MY CHAPTER'S PREVIOUS RESULTS: \$ _____

OVERALL RP CAMPAIGN GOAL: \$ _____



RP Campaign Concepts

Here are a few of the concepts and action items that will play an important part of your RP Campaign!

All forms are found under the Important Forms Tab

Action Items

This is a list of all of the tasks that should be completed during your campaign year. It will help keep you on track for success and is a great all inclusive ***RP To Do*** list.

Volunteer Committee

This worksheet will help you to organize and list your volunteer committee. This is not a job you should take on alone, so recruit help from your fellow chapter members!

Full Circle

Full Circle are gifts from chapter leadership, including you as RP chair and the BOG for your chapter. These gifts are usually among the first that your chapter will receive, and they set expectations for your chapter's campaign.

Donor Recognition

Saying "Thank You" to your donors is just as important as the initial ask. Recognition for the previous years and should be held at a chapter meeting or event in the fall.

Summary Form

Use this form to submit your contributions to Headquarters. Be sure to include full donor names and ID numbers. If you don't know the ID number, be sure to include the donor's full contact information.

Chapter RP Orders

Holding a special event to raise money for the RP Campaign? Planning a mailing to solicit donors or need pick-ups at your chapter Meetings highlighting RP? Using the Campaign Order Form, you can order promotional materials for free.

Electronic Resources

Everything is available electronically and in one easy to use webpage www.ashraerp.com. Forms, links, and lots of resources are located there.

Donor Reports

The two donor reports you will use to track current and past donors are *Donor Detail* and *10 Year History*. These reports highlight who has given this year, who gave in the past, and contact information for donors. All letters and invoices are designed to merge with the *10 Year History Report*.

Remember: All forms are found under the Important Forms Tab and on www.ashraerp.com

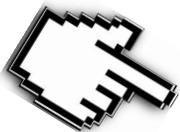
Saying Thank You

Thanking donors who made your chapter a success last year is a large part of your job as RP Chair. You must host the chapter's Donor Recognition meeting (or virtual equivalent) by December 31.

Some ideas:

- ⇒ Have a virtual meeting and thank donors by name.
- ⇒ List donors on the Chapter website.
- ⇒ Write about donors in the Chapter newsletter.

Donor recognition is much more than just a PAOE points item. It is a very important aspect of donor stewardship and retention. This is a wonderful opportunity to be able to thank the members and companies who help RP and your chapter reach goal year after year!



For more ways to recognize donors at your chapter's Donor Recognition meeting and throughout the year, visit the private RP Page - www.ashraerp.com/chapter_resources.html

ASHRAE RP Campaign: Donor Levels

| | | | | | | | | | | |
|--|---|---|---|---|---|--|---|---|---|---|
| Receives a lapel pin or pen and pencil set | | | | | | | | | |  |
| Recognized in an Insights article | | | | | | | | |  |  |
| Receives two 1 day Meeting Registration** | | | | | | | |  |  |  |
| Receives two tickets to <i>Members Night Out and Welcome Party**</i> | | | | | | | |  |  |  |
| Presented Commemorative Crystal Coin** | | | | | | |  |  |  |  |
| Invited to & Recognized at President's Luncheon** | | | | | | |  |  |  |  |
| Group photo published in a spring issue of e-society | | | | | | |  |  |  |  |
| Listed on RP Display in Registration | | | | | | |  |  |  |  |
| Receives personalized shadowbox plaque | | | | | |  | ----- | ----- | ----- | ----- |
| Receives Gold Commemorative Coin & Plaque | | | | |  | ----- | ----- | ----- | ----- | ----- |
| Receives Silver Commemorative Coin & Plaque | | | |  | ----- | ----- | ----- | ----- | ----- | ----- |
| Receives Bronze Commemorative Coin & Plaque | | |  | ----- | ----- | ----- | ----- | ----- | ----- | ----- |
| Receives Antique Commemorative Coin & Plaque | |  | ----- | ----- | ----- | ----- | ----- | ----- | ----- | ----- |
| Receives blue desktop coin holder |  | ----- | ----- | ----- | ----- | ----- | ----- | ----- | ----- | ----- |
| Listed in annual <i>Investor Honor Roll</i> |  |  |  |  |  |  |  |  |  |  |
| | Honor Roll Individuals* \$150-\$249 | Major Donor – Antique Individuals* \$250-\$499 | Major Donor – Bronze \$500-\$999 | Major Donor – Silver \$1000-\$2499 | ASHRAE Associate \$2500-\$4999 | ASHRAE Partner \$5000-\$9999 | Golden Circle Donor \$10,000 - \$19,999 | Platinum Circle Donor \$20,000 - \$29,999 | ASHRAE Benefactor \$30,000-\$49,999 | ASHRAE Patron \$50,000+ |

* Corporate Recognition begins at \$500

** ASHRAE Winter Meeting

Donor Recognition Levels

Patron

\$50,000+

Benefactor

\$30,000 - \$49,999

Platinum Circle

\$20,000 - \$29,999

Golden Circle

\$10,000 - \$19,999

ASHRAE Partner

\$5,000 - \$9,999

ASHRAE Associate

\$2,500 - 4,999

Major Donors (Organizations start at \$500)

\$250 - \$2,499

Honor Roll (Individuals Only)

\$150 - \$249

RP Vocabulary

LYBUNTs

Last Year **B**ut **U**nfortunately **N**ot **T**his

(Donors who gave last year and have not yet renewed their support)

SYBUNTs

Some Years **B**ut **U**nfortunately **N**ot **T**his

(Donors who have given sometime in the past five years but have not given this year)

Members

Current ASHRAE Members

NonMembers

Any donors (companies, organizations, or individuals) who are not members of ASHRAE

RP Chair Action Items

| Item | Due Date | Completed? | Notes |
|---|----------|------------|-------|
| Plan monthly RP articles or spotlights in chapter newsletter | ASAP | | |
| Plan year-to-date donor recognition in chapter newsletter | ASAP | | |
| Plan RP Special Events and RP Nights at chapter meetings | ASAP | | |
| Recruit chapter volunteers to help with the RP Campaign needs | Oct. 15 | ★ | |
| Achieve Full Circle status for your chapter (and Full Circle Plus!) | Nov. 15 | ★ | |
| Reach 30% of goal | Dec. 1 | ★ | |
| Host a Special Event | All Year | ★ | |
| Contact LYBUNT major donors | Dec. 31 | | |
| Recognize donors at a chapter meeting | Dec. 31 | ★ | |
| Consult BOG about creating or giving to a chapter endowment | March 31 | | |
| Implement a LYBUNT and SYBUNT calling campaign (including major donors) | March 31 | | |
| Meet your chapter Scholarship Goal (on RP Spreadsheet) | March 31 | ★ | |
| Reach 60% of goal | March 31 | ★ | |
| RP Succession Plan | April 1 | ★ | |
| Reach 100% of goal | June 15 | ★ | |
| Contact all LYBUNTs to renew RP support | June 30 | | |

★ Please Note: due dates marked with a star are associated with earning PAOE points!

Suggested Chapter Solicitations

| AUGUST | SEPTEMBER | OCTOBER | NOVEMBER | DECEMBER | JANUARY | FEBRUARY | MARCH | APRIL | MAY | JUNE |
|--|--|---|--|--|---|--|---|---|--|---|
| <p style="text-align: center;">See you at Training!</p> | <p>Donor Contacts: "new" SYBUNTS Ch. Officers</p> <p>Remember: YEA! DR, FC, VC Scholarship</p> | <p>Donor Contacts: Chapter Officers</p> <p>Remember: DR VC deadline</p> | <p>Donor Contacts: Chapter Officers Calendar donors</p> <p>Remember: FC Scholarship Deadline</p> | <p>Donor Contacts: Calendar donors</p> <p>Remember: Donor Rec & <i>Thanks!</i> Calendar Yr-End gifts</p> | <p>Donor Contacts: Calendar donors</p> <p>Remember: Fun postcard!</p> | <p>Donor Contacts: Major Donors Spring Event donors</p> <p>Remember: Trane Match</p> | <p>Donor Contacts: \$500+ SYBUNTS LYBUNTS Trane Empl.</p> <p>Remember: Trane Match Major Donor confirmation</p> | <p>Donor Contacts: Trane Empl. Spring Event Donors</p> <p>Remember: Trane Match YEA</p> | <p>Donor Contacts: LYBUNTS New Contacts SYBUNTS</p> <p>Remember: Fun Postcard!</p> | <p>Donor Contacts: LYBUNTS Chapter Gift Outstanding Pledges</p> <p>Remember: Remember: JUNE 30</p> |

Friendly Reminders:

Run your 10 Year History to find LYBUNTS and SYBUNTS.
Samples of letters found on www.ashraerp.com.
Contact RP Staff if you need letterhead, pledge, or return envelopes.

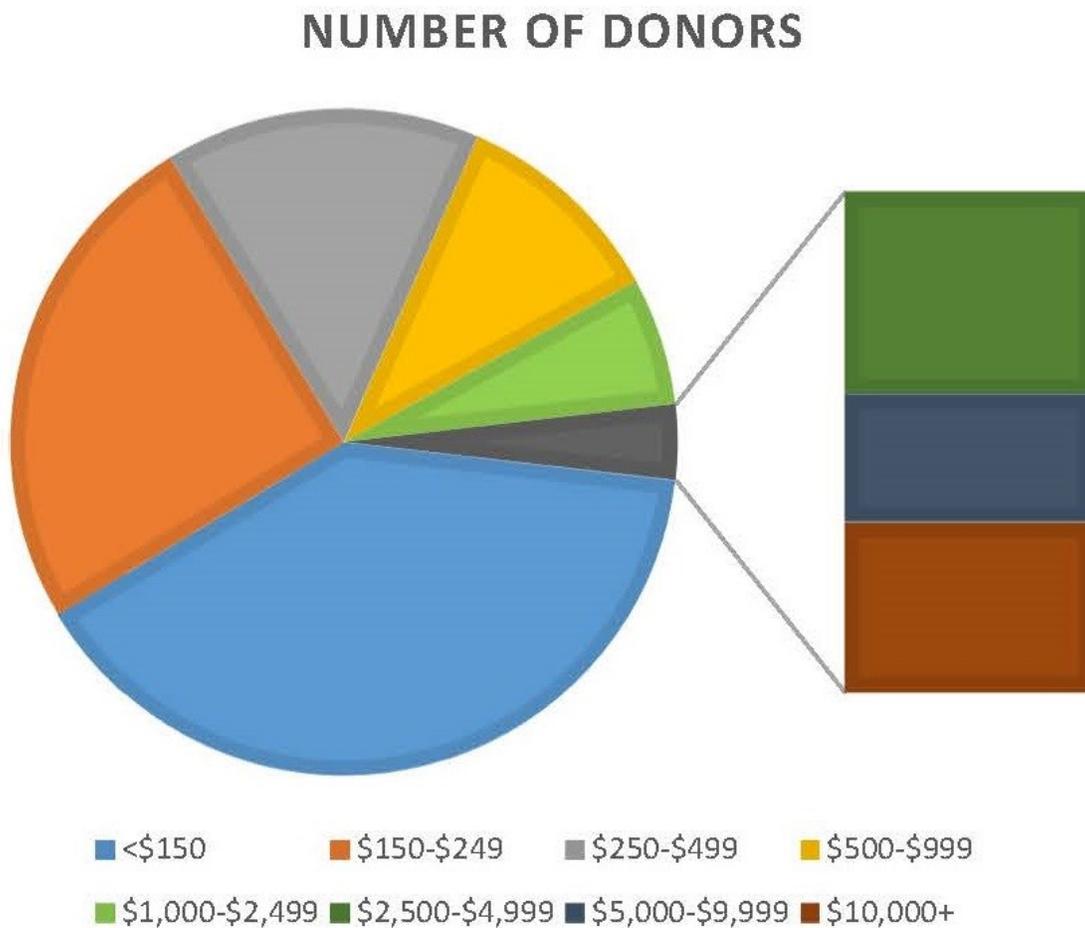
Headquarters Solicitations

| AUGUST | SEPTEMBER | OCTOBER | NOVEMBER | DECEMBER | JANUARY | FEBRUARY | MARCH | APRIL | MAY | JUNE |
|--|--|--|---|---|-------------------------------|---|--|--|--|---|
| <p>Donor Contacts: "new" SYBUNTS Ch. Officers</p> | <p>Donor Contacts: YEA donor & non-donors</p> | <p>Donor Contacts: \$500+ companies Regional officers</p> | <p>Donor Contacts: Calendar donors \$500+ members Ch. Officers</p> | <p>Donor Contacts: Chap & Reg Officers</p> | <p>Donor Contacts:</p> | <p>Donor Contacts: \$500+ SYBUNTS LYBUNTS Major Donors</p> | <p>Donor Contacts: Trane Empl. YEA donors & non- donors</p> | <p>Donor Contacts: LYBUNTS Yr Coins</p> | <p>Donor Contacts: \$500+ SYBUNTS LYBUNTS</p> | <p>Donor Contacts: LYBUNTS</p> |

How Much To Ask For

You may have reservations about asking for gifts, especially when it comes to larger gifts. **Don't panic!** Most gifts come from members just like you!

For example, the chart below shows a breakdown of the average number of donors per giving level.



As you can see, the majority of your chapter's gifts will be under \$500!

Full Circle

ASHRAE RP: Chapter Full Circle

Please use this form to list the chapter officers giving for Full Circle.

Chapter Name _____ Date _____

Online?

| <i>Title</i> | <i>Officer's Name*</i> | <i>Date</i> | <i>ID #</i> | <i>(Yes/No)</i> | <i>Amount</i> |
|-----------------|------------------------|-------------|-------------|-----------------|---------------|
| President | _____ | _____ | _____ | _____ | _____ |
| President Elect | _____ | _____ | _____ | _____ | _____ |
| Vice President | _____ | _____ | _____ | _____ | _____ |
| Treasurer | _____ | _____ | _____ | _____ | _____ |
| Secretary | _____ | _____ | _____ | _____ | _____ |
| RP Chair | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |

* If a position is not filled, write "N/A" for Officer's Name

Please make sure these items are completed:

Full Circle:

- Individual's name listed
- \$100 given (min)
- Completed by November 15

Full Circle Plus:

- Full Circle completed
- Officer listed on CIQ
- Completed by November 15

This form must be submitted to Headquarters by November 15 in e

Send to your RVC and:

ASHRAE RP
 180 Technology Parkway
 Peachtree Corners, GA 30092
 E-mail: RP@ashrae.org

Tips:

- Show your personal support and the chapter's support to your fellow donors!
- Plan on asking for BOG support at your next chapter Meeting so the completion may be announced ASAP. [Extra points for Full Circle +!](#)
- Highlight the accomplishment and support in your chapter's newsletter or webpage!

Week One

| Action Item | Estimated time |
|--|----------------|
| Run Donor Detail Report | 10 minutes |
| Update list of donors for chapter newsletter and webpage | 20 minutes |
| Merge and send thank you notes | 30 minutes |

Materials Needed

- Username and password
- Contact and deadline info for newsletter and webmaster
- Notecards or letterhead

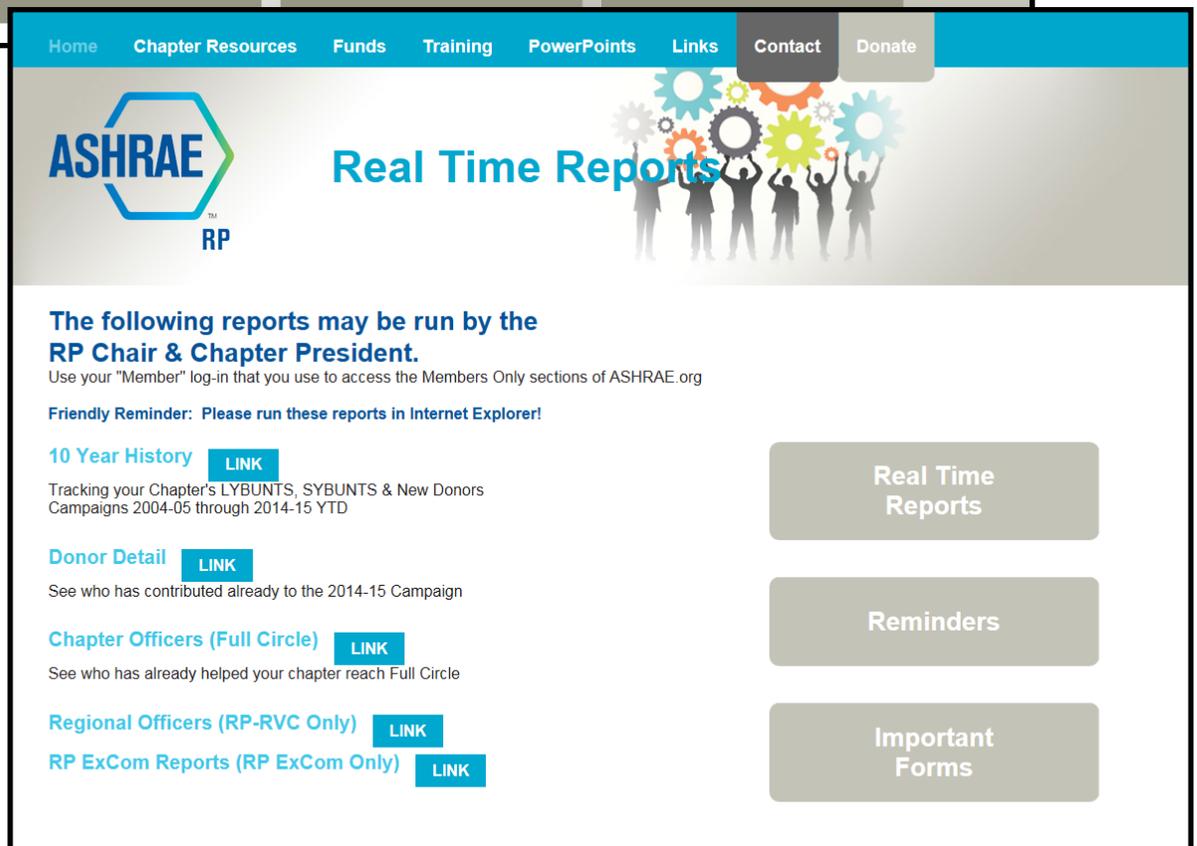
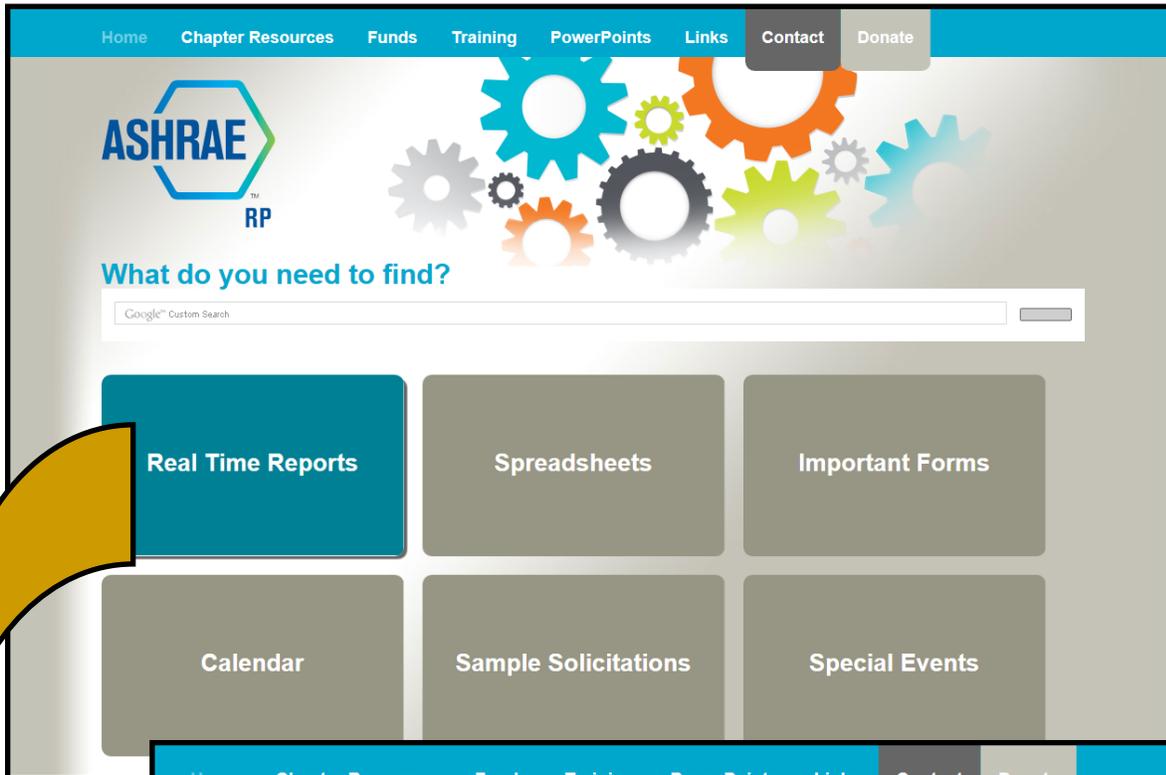
Suggestions

- Order RP notecards from Headquarters
- Bring thank you notes to chapter planning meetings for signature by chapter BOG or officers
- Wording may be found on www.ashraerp.com

Donor Reports

Running your donor reports is something you will do multiple times a month. Luckily, it's quick and easy!

Go to the private RP page - www.ashraerp.com - and select the box labeled *Donor Reports*



Chapter Thank You Notes

Dear Tom,
Thank you so much for your recent gift to help support the Northeast Chapter's RP campaign! We look forward to recognizing your gift at our Chapter Meeting on Tuesday and seeing your name in the Honor Roll, published in the October ASHRAE Journal. We know we can always count on your support - financial and, as importantly, your unending support to the Chapter and to ASHRAE as a whole.
Thanks again for everything,
Northeast Chapter 2015-16 Officers:
Alex John Brian Elizabeth Carl

Tips:

- Samples on www.ashraerp.com
- The idea is to THANK, not ask for more
- Need supplies? Let RP Staff know!

Dear xxxxxx,

Thank you!!

Your recent contribution to ASHRAE Research is greatly appreciated. As the RP Chair and a fellow member of the xxxxxx Chapter, I wanted to personally thank you for your support. Not only will it help us meet our chapter RP goal this year, but you're making an investment in our Region and the future of our industry.

I bet you didn't know that your contribution will go to directly support Research being conducted in our own Region. It's not just supporting Research in Region xxxx but projects and students, through the Grant-in-Aid program, in our own area. Region xxxxx currently has more than xxxxx worth of active research projects. Over all, your support and the support from thousands of members like you, is helping to fund more than \$14million worth of research worldwide this year.

Last year, Region xxxxx raised xxxxxxx. That's xxxx for every \$1 given by a regional donor. I don't know about you but I find that a great return on my investment!

If you'd like a list of research projects being conducted in the region or about specific topics, please let me know.

Thanks again for all your support and I look forward to seeing you at the next xxxxxxxx Chapter Meeting.

BOG member/ RP Chair

PS. Your 'official' tax letter will be coming directly from ASHRAE Headquarters in Atlanta.

Chapter Newsletter and Webpage



Next Chapter Meeting:
May 13, 2015
Spokane Convention Center
334 W. Spokane Falls Blvd.
Spokane, WA.

Home Membership Students Events RP YEA Newsletter Sponsors Contacts
Meeting RSVP

Research Promotion

| Inland Empire - ASHRAE Research Promotion Campaign 2014-15 | | |
|---|--|---|
| INDIVIDUAL DONORS | CONTRIBUTIONS TO DATE | COMPANY DONATIONS |
| HR - Honor Roll Participants \$150 min Major Donors (Bronze) \$500-\$999: Honor Roll Donors \$150-\$249: Michael Moskback - \$100 Robert Dixon - \$120 Randy Seaman - \$100 Mike Hudson - \$100 Michael Natvig - \$100 Jerry Van Guilder - \$100 Chris Ogden - \$100 David Reames - \$100 Chris Robinson - \$100 Matt Landon - \$100 Ed Langebartel - \$100 David Nesbitt - \$50 | Major Donors (Silver) \$1000+: Colmac Coil - \$1000 Inland Empire Chapter 078 \$100 Scholarship Donation to RP RP CAMPAIGN THERMOMETER \$4,000 \$3,300 \$1,000 \$2,300 \$2,000 \$1,000 \$500 \$0 | Major Donors (Bronze) \$500-\$999: Klemke & Hagood - \$500 ATS Inland NW - \$500 Major Donors (Antique) \$250-\$499: Energy Control, Inc. (Al Leech) - \$250 Honor Roll Donors \$150-\$249: |
| Campaign Goal - \$3,150.00 Current Campaign Total - \$3,220.00 118.1% of Goal | | |

Updated 4/30/15

Since 1919, ASHRAE has supported research to improve the quality of life. ASHRAE Research impacts the industry by improving the way HVAC&R systems work, how they are applied and allow development of technical information to create standards and guidelines, which serve as the basis for testing and design practices around the world.

Research Promotion Fund Raising Supports:
 Research
 Young Engineers in ASHRAE (YEA)

- ### Tips:
- List your donors from last year and thank them for the chapter's success
 - List donors from the current year and show how close the chapter is to making goal
 - Explain how research is used in every day life and in the industry -- make it relevant for the donor



EVENTS PUNCH LIST RESEARCH PROMOTION TAC JOBS ABOUT US

Research Promotion

Since 1919, ASHRAE has supported research to improve the quality of life. ASHRAE Research impacts the industry by improving the way HVAC&R systems work, how they are applied and allow development of technical information to create standards and guidelines, which serve as the basis for testing and design practices around the world.

The Society funds thousands of projects addressing topics such as sound, duct design, the effect of oil in refrigerants, load calculations, thermal conductivity, simplified energy analysis procedures, weather data, refrigerant property data, fire and smoke control and solar design. The most significant ASHRAE research is in the areas of human comfort and the properties of materials and systems used in buildings and refrigeration systems.

Research and Your Health

- Prevent more than 70,000 surgical site infections that occur each year
- Decrease the spread of airborne diseases
- Improving cancer treatment methods

Research in Your Workplace

ASHRAE Research is learning more about how commercial buildings can:

- Conserve energy in hot and humid climates
- Select boilers for efficient heat use
- Allow drifting temperatures to save energy

At Home and At School

- Exploring whether temperature and air quality improve the performance
- Understanding the relationship between occupant health and ventilation rates
- Evaluating how food preservation is influenced by storage conditions

For more information please visit the ASHRAE Society's Research Promotion website:
<https://www.ashrae.org/standards-research-technology/research>

RP DONATION TRACKING



Help us meet our goal!

Raised so far: \$2,550

HELP US MEET OUR 2014-15 RP CAMPAIGN GOAL

Donate!

Be sure to include "Puget Sound" in the ASHRAE Chapter box.

Search

Committees

- Membership
- Scholarship
- Research Promotion

Extras

- ASHRAE Society
- Chapter History
- Newsletter Archives
- Chapter Library
- Links
- Gallery

Sponsors

Platinum Sponsors

Gold Sponsors

Silver Sponsors

Research Promotion

The Cleveland Chapter would like to recognize Rick Zbin and Ann Stockmaster for agreeing to the 10th challenge in Cleveland! What is this you ask? They have agreed to donate 10% of our chapter's RP campaign, potentially \$2500 for the 5th year in a row. These donors are a rare find, and we hope to make them proud of our accomplishments this year!

ASHRAE would like to extend a special thank you to all of those who generously donated to Research Promotion so far this year and invite others to add their name to this list!

The Cleveland chapter has raised just over \$7,500.00 with our goal of \$15,000!

To support and invest in ongoing efforts of ASHRAE that provide our engineering community with the tools and knowledge for successful designs, go to www.ashrae.org/rp.

Mr. Dominic Cacolici, PE

Mr. Douglas A. Barnes

Mr. Frank Mastroianni

Mr. Frederick H. Holman

Mr. Harold R. Lewis, PE

Mr. James Duft

Mr. James G. MacMillan

Mr. Jerald K. Cohen

Mr. Kendall Lewis

Mr. Kristopher Wayne Haycock

Mr. Louis A. Bentzen

Mr. M. James Karpinski, PE

Mr. Matthew D. Morgan

Mr. Michael T. Deak

Mr. Mick Spillane

Mr. Mike Quinn

Mr. Richard A. Zbin

Mr. Robert Chmielewski

Air Control Products - Cleveland

Armor & Associates

David Lefrancis & Co

Home About Us Membership Newsletter Meetings & Events Students YEA Announcements Research Promotion

Research Promotion

How to Donate to ASHRAE Research

Donors List

[-] Get to Know ASHRAE Research

Research and You

Because of Your Support Today...

Research and Sustainability

Consumer Center - IAQ

We Built This City

Region X Your Money at Work - List of Projects

Local Research Projects

Research Promotion

Welcome to Golden Gate Chapter's ASHRAE Research Promotion Committee Home Page.

For 2013-2014 campaign, committee chair is Zberri Avi. Sub-pages within Research section are intended to provide information on ASHRAE Research, Local Research Projects, Golden Gate Chapter's Contribution List, and How to Donate.

Please feel free to contact me with any questions

Jason Lesser
jesser@ami-hvac.com
(510) 455-0002

The History of ASHRAE Research

Since 1910, ASHRAE has supported research to improve the quality of life. ASHRAE Research impacts the industry by improving the way HVAC&R systems work, how they are applied and allow development of technical information to create standards and guidelines, which serve as the basis for testing and design practices around the world.

The Society funds thousands of projects addressing topics such as sound, duct design, the effect of oil in refrigerants, load calculations, thermal conductivity, simplified energy analysis procedures, weather data, refrigerant property data, fire and smoke control and solar design. The most significant ASHRAE research is in the areas of human comfort and the properties of materials and systems used in buildings and refrigeration systems.

Research and Your Health - ASHRAE Research is working in the health arena to help:

- Prevent more than 70,000 surgical site infections that occur each year
- Decrease the spread of airborne diseases
- Improving cancer treatment methods

Research in Your Workplace - ASHRAE Research is learning more about how commercial buildings can:

- Conserve energy in hot and humid climates
- Select boilers for efficient heat use
- Allow drifting temperatures to save energy

At Home and At School - ASHRAE Research is:

- Exploring whether temperature and air quality improve the performance
- Understanding the relationship between occupant health and ventilation rates
- Evaluating how food preservation is influenced by storage conditions

For more information please explore the subpages listed to the left, or visit the ASHRAE Society's Research Promotion website: <https://www.ashrae.org/standards-research-technology/research>

Press Terms of Use Privacy Policy Member Area Site Map Admin

Home

Next Meeting

Newsletter

Membership

Students

Calendar

Employment

Library

Utah BOG

Bylaws

History

Online Store

Links

Research

The funds collected through ASHRAE Research Promotion provide all of us the technical information in the ASHRAE Handbooks we need to do our jobs. The funds are also used to support the ASHRAE Learning Institute program which provides excellent training for anyone in the industry who wants to sign up for the 'online' education courses. If you wish to see what one of the ASHRAE Handbooks would contain 'without' the support received from ASHRAE Research, click [here](#).

June 30, 2015 is our final deadline to have all contributions sent to ASHRAE Headquarters.

THANK YOU TO ALL WHO HAVE ALREADY CONTRIBUTED TO OUR CHAPTER'S SUCCESS!!

If you wish to support your Chapter with a contribution to ASHRAE Research, you may do so in one of three ways:

- Go online to <https://x20.ashrae.org/secure/researchpromotion/rp.htm> and make your contribution with a credit card or PayPal.
- Call Tom Colvin, RP Chair, at 801-631-8234 or any one of the RP Committee members listed below and give them your credit card information or send them a check made payable to ASHRAE Research.
- Bring your check or credit card to an ASHRAE meeting and one of the RP Committee will be available to accept your contribution.

Many Chapter members have asked "How much?" is a reasonable contribution to ASHRAE Research. My answer is "It depends." If you divide our Chapter goal by the entire membership, it is an "average" of \$52/member but not everyone is able to contribute. So the following information may help you decide based on "historic" contribution levels in our Chapter:

- Large Engineering firm, Contractor or Supplier = \$500-\$1000
- Smaller Engineering firm, Contractor or Supplier = \$200-\$400
- Individuals - Principals/Owner/Partners = \$100
- Individuals - Project Managers/Outside Salesperson = \$50
- Individuals - Engineers/Inside Salesperson = \$25
- Endowment - It Keeps giving every year - Minimum = \$2,500

Our Utah Chapter Research Promotion Committee is comprised of 10 Utah Chapter Past Presidents and several others who have been very supportive of the Chapter for many years.

RP Committee Members:

Brandon Briggs (VBFA), Brett Christiansen (Palmer-Christiansen), Chuck Lush (Advanced Concept Engineering), Dan Goulding (Trane), Dan Rollins (Michael Baker Corporation), Doug Wilkinson (LONG Building Environments), Gary Anthon (Alliance Energy Integration), Joe Touhuni (Applied Product Solutions), Keith Gritton (Gritton & Associates), Knute Peterson (PVE), Larry Veigel (Heath Engineering), Lyn Fellon (Scorpion Restraint Systems), Matt DeGooyer (Midgley-Huber), Mitch Tervort (Olsen & Peterson Engineering), Ray Coleman (Certified Testing & Balancing), Steve Connor (Colvin Engineering), Trent Hunt (Intermountain Mechanical Products)

One of these individuals will be calling on you and your companies for support of the Research Promotion fundraising.

We have a very strong Chapter and it SHOWS!

Thanks for your support!

Tom Colvin - RP Chair 2014-15 and Brandon Karren - RP Co-Chair
801-631-8234 801-262-5664

Week Two

Action Item

Estimated time

Follow up on outstanding pledges

20 minutes

Follow up with volunteer committee on their outstanding pledge calls

20 minutes

Call five past, current, or potential donors

20 minutes

Materials Needed

- 10 Year History Donor Report
- Volunteer committee
- Donor call sheets

Suggestions

- Use a mix of past officers, BOG Members, long time members, and new members to form your volunteer committee! This is a great way to introduce new people to RP and take advantage of previous experience!
- Follow up verbal pledges with an email thanking, restating pledge, giving a suggested due date, and offering help.

Volunteer Committee

ASHRAE RP: Volunteer Committee

Please use this form to list the members of your *Volunteer Committee*.

RP Chair: _____

Chapter: _____

Date: _____

VOLUNTEER NAME

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____
- 6) _____
- 7) _____
- 8) _____
- 9) _____
- 10) _____
- 11) _____
- 12) _____
- 13) _____
- 14) _____
- 15) _____

The *Volunteer Committee* can be used for your chapter's Calling Campaigns (in November, March and May), special events, and for researching or contacting prospective donors.

This form must be submitted to Headquarters by October 15 in order to qualify for PAOE Points.

Send to:

RP@ashrae.org

Tips:

- Word Document at ashraerp.com
- A great way to involve different types of members with different levels of RP experience!
- Outline the different tasks throughout the year and expected time commitment, and let the volunteers choose how they want to help.

Donor Detail vs 10 Year History Reports

When, Why, and How To Use

- Donor Detail: Point of view of the **gift**
 - ⇒ Date of the gift, how it was submitted, what fund it was designated for, and what chapter receives the credit
- 10 Year History: Point of view of the **donor**
 - ⇒ Year-to-date giving total, lifetime giving history, contact information, home chapter

Home Chapter Resources Funds Training PowerPoints Links Contact Donate

ASHRAE
RP

Real Time Reports

The following reports may be run by the
RP Chair & Chapter President.
Use your "Member" log-in that you use to access the Members Only sections of ASHRAE.org

Friendly Reminder: Please run these reports in Internet Explorer!

10 Year History [LINK](#)
Tracking your Chapter's LYBUNTS, SYBUNTS & New Donors
Campaigns 2004-05 through 2014-15 YTD

Donor Detail [LINK](#)
See who has contributed already to the 2014-15 Campaign

Chapter Officers (Full Circle) [LINK](#)
See who has already helped your chapter reach Full Circle

Regional Officers (RP-RVC Only) [LINK](#)
RP ExCom Reports (RP ExCom Only) [LINK](#)

Real Time Reports

Reminders

Important Forms

Donor and Potential Donor Call Sheets

DONOR CALL SHEETS – Volunteer's Name: _____

DONOR INFORMATION: «Acknowledgement_Name» ID#: «ID_» CHAPTER: «Chapter»

Contact: «Contact_Name»

ADDRESS:

«Address1»

«Address2»

«City», «State» «Zip»

Phone: «Phone»

Email: «Pref_Email»

| DONOR'S GIVING HISTORY | | | | | |
|------------------------|--------------|----------------|----------------|----------------|---------------------|
| 2014-15 | 2013-14 | 2012-13 | 2011-12 | 2010-11 | ASK FOR THIS AMOUNT |
| «M_20142015» | «M_20132014» | \$«M_20122013» | \$«M_20112012» | \$«M_20102011» | \$«ASK» |

CALL RESULTS:

| CALL | DATE | TIME | CODE | NOTES |
|------|------|------|------|-------|
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |

CODES: NA: No Answer P: Made a Pledge DEC: Declined / No
 CB: Call Back AC: Already Contributed NO\$: Can't afford
 X: Disconnected/Wrong# UP: Unspecified Pledge DNT: Don't Call Again
 LD: Long Distance Call WC: Will consider NO/D: Deceased

PLEDGE: \$ _____ **SPECIFIED BILLING DATE:** _____

CHARGE: \$ _____ / / VISA / / AMEX / / MC (other than Canada)

CARD NUMBER: _____ **EXP DATE:** _____

NAME ON CARD: _____

Thank you for your support!

Thank you for your pledge of support in the amount of \$ _____

You may use a credit card to fulfill your pledge by completing the charge information on the inside flap of the reply envelope.

Please return this reminder slip with your payment for proper crediting.

ID#: «ID_» Chapter: «Chapter»

«Acknowledgement_Name»

«Contact_Name»

«Address1»

«Address2»

«City», «State» «Zip»

Tips:

- Word Document at www.ashraerp.com
- Set to merge with 10 Year History Report
- Not sure how to create or use a mail merge with Word and Excel? Check out the instructional videos at www.ashraerp.com
- Need outside, return or pledge envelopes? Let RP Staff know!

Week Three

Action Item

Estimated time

Complete paperwork for collected gifts and mail to Headquarters. Enter credit cards online.

30 minutes

Update RP-RVC and RP Staff on PAOE points and chapter activities

20 minutes

Ensure chapter calendar reflects upcoming RP events and activities

10 minutes

Materials Needed

- Summary form
- RP-RVC contact info

Suggestions

- Instead of collecting online gifts via your chapter's Paypal account, direct donors to ASHRAE's online RP form. It's free, easy to use, and the chapter still receives the credit.
- Your RVC and RP staff are great resources if you have questions or issues. Reach out!

Submitting Gifts

You've raised the money, now what?

Send it in to Headquarters ASAP!

But first, a few things to keep in mind:

- Please include a completed form with gifts. You may use either the Comprehensive Summary Form or the Abbreviated Summary Form. Both are available online - www.ashraerp.com/important_forms.
- Be sure to indicate chapter name and date at the top of the form.
- Please list all donor names and ID numbers in full.
- If this is a new donor, please include the complete address and contact information.
- Indicate the amount of the gift for each donor.
- **PLEASE DO NOT MAIL CASH TO ASHRAE.** Instead, deposit the cash in a local account and write a check to *ASHRAE RP*. Note the name of the donor on the summary form.
 - * *If the name of the donor is not provided, ASHRAE will assume that the contribution is from the checking account holder.*

IMPORTANT

Checks received with a date older than 3 months are “stale-dated” and are NOT accepted at the bank. Stale-dated checks mailed to Headquarters will be returned to you.

DO NOT HOLD CHECKS!

Holding checks:

- May cause issues with a donor's tax records.
- May cause a donor to receive solicitations after they've already given.
- Makes donors question how urgently ASHRAE needs their gift.

Send gifts to:

ASHRAE RP
180 Technology Parkway
Peachtree Corners, GA 30092

Online Gift Form

Invest in ASHRAE and Help Shape our Future

I would like to financially support ASHRAE's mission, programs, and member services indicated below: (indicate the amount you wish to contribute in U.S. dollars to any or all resources below)

U.S.\$ ASHRAE Research ASHRAE Research Canada

U.S.\$ ASHRAE Learning Institute and educational programs

U.S.\$ Endowed Research via ASHRAE Foundation.

* By checking the box, I indicate that I understand that these are endowed funds and permanently restricted for the support of ASHRAE Research.

Existing Fund Name (If known):

[Click here to see existing endowments](#)

U.S.\$ ASHRAE Scholarships (endowed scholarship support)
 Select One

U.S.\$ ASHRAE General Fund

U.S.\$ Young Engineers in ASHRAE (YEA) Support

U.S.\$ **Total** contribution to be charged to credit card

Please check one:

Personal Contribution Company Contribution
 (Honor Roll level contributions listed in ASHRAE's October Journal Iss individuals and \$150.00 for companies.)

Payment Method (Note - all fields are required)

Charge my gift to:

Name as Appears On Card:

Credit Card Type:

Credit/Charge Card Number:

Expiration Date:

By completing this transaction, you agree to ASHRAE's Privacy Policy

Contributor Information Fields in red are required

Donor Name (Individual / Company to be Recognized): *

ID # (if known):

Assigned ASHRAE Chapter (if known):

Address 1: *

Address 2:

City: *

Tips:

- Select the fund to support
- Unsure if your chapter has an Endowed Fund? Check the pop-up box!

Credit Card Type:

Credit/Charge Card Number:

Expiration Date:

By completing this transaction, you agree to ASHRAE's Privacy Policy

Contributor Information Fields in red are required

Donor Name (Individual / Company to be Recognized): *

ID # (if known):

Assigned ASHRAE Chapter (if known):

Address 1: *

Address 2:

City: *

State or Province:

Zip Code:

Country: *

Phone:

E-mail (to receive confirmation): *

Would you like to make this gift in Memory or Honor of an Individual?

Memorial Honorarium No, thank you.

Fields with a star (*) below are required if 'In Memory Of' or 'In Honor Of' is selected.

Name of person to be recognized: *

Send Gift Acknowledgement to:

Relationship to Person Being Remembered:

Acknowledgement Address 1:

Acknowledgement Address 2:

Acknowledgement City:

Acknowledgement State or Province:

Acknowledgement Zip Code:

Acknowledgement Country:

If you do not receive a confirmation email after submitting your gift, please contact Patricia Adelmann, RP Manager, at 678-539-1114 or padelmann@ashrae.org

- Donor's Name is who receives the credit and whose member # should be included.
- Remember - gifts aren't automatic. Please give us 2-3 days to process.

Goal, High Five and Challenge Goal

Goal: The amount set by your DRC and RVC based on past results, chapter leadership, and Regional needs

High Five: The largest amount of money for your chapter over a five year period *PAOE Points!*

Apex Award: Increasing the amount of money your chapter raised for five years in a row *PAOE Points!*

Challenge Goal: A chapter's High Five (the highest amount raised in five years) plus 5% *PAOE Points!*

Myths About RP Goals:

Goals automatically go up every year!

False! While the needs of ASHRAE continue to increase, the DRC and RVC set the Regional and chapter goals according to the chapter's ability. If you think your goal is unreasonable, talk to your RVC about your concerns.

A large one-time gift will sink the chapter for the next five years!

False! The RP committee understands that chapters may receive one-time gifts during the campaign. Tell your RVC and they can petition the RP committee to adjust High Five and challenge goals appropriately.

We're hosting the CRC, we can't support RP!

False! Your CRC is a great opportunity to galvanize the chapter and reach out to new donors. Discuss strategies and tips for success with your RVC. Your CRC year can be your best RP year yet!

Week Four

Action Item

Estimated time

Plan for upcoming RP events and chapter meetings, including ordering items

40 minutes

Reach out to donors you haven't spoken to yet

20 minutes

Materials Needed

- Campaign order form
- Fund specific brochures, PowerPoint presentations, posters

Suggestions

- Check out the materials on www.ashraerp.com. These can be built upon for your particular chapter meeting or event. If you need help, please reach out to RP staff!
- **You are doing a fantastic job!**

Special Events

Special event fundraisers are something that every chapter does to help raise money for RP. If done correctly, they can be both fun and profitable.

- **Income must exceed expenses.** A rule to a successful fundraising special event is your profit should be at least 50% of your total funds raised. Of those profits, **75% (minimum \$500)** must be donated to ASHRAE in order to receive RP PAOE points.
- **Donated and sponsored services (gift-in-kind)** can keep costs down. The chapter should consider making a cash donation in a gift-in-kind donor's name to ASHRAE so their support can be publicly recognized.
- **Impact on the annual campaign:** There is the possibility of donors feeling “over-asked” with special events. If your current RP donors are the people you expect to support your event, you may find they feel that they have already provided enough support to your campaign and are not interested in giving more.
- **Special events should be part of your overall campaign plan.** Don't rely on one event to reach your RP goals.
- **Competition with other fundraising events:** Remember to find out what is happening in your community and other professional associations on the dates you are considering for your special event. If you find too many conflicts, consider a joint fundraiser. This introduces new members to ASHRAE, brings in a new donor base, and is often a win-win for both organizations.
- **The time a special event takes to organize is enormous.** If the net payoff does not justify the time and money required to succeed, another approach should be chosen.

For information on ASHRAE's special event insurance and other tips, visit www.ashraerp.com/special_events.html

Submitting Gifts from Special Events

1. Submit a summary form as normal, including contributor numbers, full donor names, and complete contact information for new donors.
2. Be sure to give all donors credit for their gifts. Not dividing a large special event check can cause issues with a donor's tax records and can upset a donor who expects to see their name in the Honor Roll and receive their recognition items. Also, a donor will continue to be solicited by Headquarters because there is no record of their contribution.
3. Build in a minimum of an Honor Roll level contribution (\$150 for individuals and \$500 for companies) when setting hole fees, registration, etc.
4. If you receive donated items and services the chapter should consider making a contribution in the donor's name so they can receive recognition at the local and national level.
5. **If a minimum of an Honor Roll contribution or even dollar amount does not “mathematically” work out from your special event proceeds, consider making a gift in the donor’s name from the chapter treasury.** For example, if seven corporate donors are each to receive credit for gifts of \$487.53, consider writing a check for \$87.29. That will give each company credit for an additional \$12.47 and bring them up to an even Honor Roll level as \$500 donors.

How to Set-up a Virtual Meeting or Event

1. What type of event are you having? What kind of participation do you want or expect from your attendees? Is it important that everyone who attends gets the chance to participate with video and audio, or is it more important that attendees watch a speaker? The type of event will inform what meeting platform you use.
2. Solicit sponsors. Your annual donors will still want to participate in events/meetings and you can still give them the time or space they are wanting virtually. You can involve them as speakers, on slideshow presentations, or just with their logo on a virtual sign.
3. Make sure you have access to a computer or another device with a microphone and webcam.
4. Choose a meeting platform.
 - There are many hosting platforms out there to choose from, with pricing ranging from free to monthly or yearly subscription plans. Check to see if any of your chapter officers already have a subscription to a meeting platform.
 - Zoom is a popular option (www.zoom.us). It's an easy-to-use and robust platform supported by many operating systems, and it's free for up to 100 attendees for a 40-minute meeting. For unlimited time during your event, you can subscribe to a yearly plan. Zoom is popular right now in education and community events and it's easy to find online resources to help you plan your Zoom meeting.
 - Skype (www.skype.com) is another popular app that almost everyone has on their business device, and it supports group calls of up to 50 participants for free.
 - ASHRAE also has the capability to host your meeting or event on GoToMeeting or GoToWebinar. To schedule, or for more information, email Regioninfo@ashrae.org.
5. Invite your attendees. Make sure to include registration instructions, if any, and information about logging in. Set the invite to remind participants the day of the event/meeting. If that is not an option, be sure to send out a reminder shortly before the event/meeting begins.
6. Practice. Get familiar and comfortable with your platform to minimize the risk of hiccups during your event. Set up a short meeting with your chapter board or volunteer committee and have everyone test the various features of your chosen platform.
7. Recognize your sponsors or donors. You can be as elaborate or simple as you want. Use PowerPoint or another program to create slides thanking sponsors or donors and run it during your event. You can also mention your event is "sponsored by" in your invite or follow-up communications.
8. On the day of the event, assign one person to deal with any issues from attendees like trouble logging in, sending the link, issues with their interface, etc.
9. Follow-up. Send a thank you to the attendees and sponsors. Ask for feedback so you can correct anything before your next event or meeting and keep the attendee involved. If you already have the next one scheduled, include that information.

Virtual event ideas

- Virtual chapter meetings
- Cooking club or wine tasting
- Crafting tutorial
- Book group
- Virtual 5K
- Lecturer
- Virtual Golf Tournament
- Paint & Sip
- Cocktail tutorial
- Game Show
- Karaoke
- Ted Talks
- Happy Hour (BYOB)
- Professional Dev Session
- Virtual Murder Mystery Dinner

Campaign Order Form

ASHRAE RP: Campaign Order Form

All Items Must Be Used to Profit ASHRAE RP.

Chapter: _____

Event: _____ Date of Event: _____

Documents to Promote ASHRAE Research at Meetings and Events:

ASHRAE Research Honor Roll
(October Journal Reprint) _____
Specialty Research Topic Fliers _____

Promotional Items for Chapter Meetings and/or Events:

RP Hero Sticker _____
ASHRAE RP Pens _____
ASHRAE RP Golf Tees/Marker Pack _____
ASHRAE RP Sunscreen _____
ASHRAE Koozie _____
Heating without Research Matches _____
RP Oval Window Decals _____
ASHRAE RP Band-Aid _____
ASHRAE RP Hand Sanitizer *New!* _____

Please Note:

These giveaways are limited quantity. Please choose only one item to order for your event. If you would like a variety of items, please contact Staff and we will try to accommodate your request.

NEW!

We now have ASHRAE RP Hand Sanitizer. You can add as many as you need to any order!

Items to Assist with Calling Campaigns and Solicitations:

ASHRAE RP Letterhead _____
ASHRAE #10 Envelopes _____
ASHRAE RP #9 Return Envelopes _____
Notecards & Envelopes _____
Calling Kit *Now on-line!* _____

For Special Guests or Major Donors visiting the Chapter:

RP Ceramic Mug *limit 3 _____

Please Note:

These items are only to be ordered for special guests, speakers, or recognition of a Major Donor. Please contact Staff if you need more than 3.

SHIP TO:

Phone Number (for Shipping): _____

Tips:

- Please order at least four weeks prior to your event
- No need to order ahead for the entire year; we'll be happy to send you items as you need them.
- Samples and photos of most items may be found on www.ashraerp.com under *Chapter Resources*

Please note: Some items may be out of stock. We will communicate this with you as quickly as possible.

Important Form Tips and Suggestions

- All forms are available on www.ashraerp.com under *Important Forms*.
- Please type or write neatly. If most people can't read your handwriting, we probably can't either!
- If the form earns the chapter PAOE points, please send it to both your RP-RVC and RP Staff.
- If you think there should be a form but can't find it, have any suggestions on how to make the RP Campaign forms easier to use or see a mistake, please let the RP Staff know. We're always willing to help and want it to be easy and intuitive for the volunteers.

ASHRAE RP: Campaign Order Form

All Items Must Be Used to Profit ASHRAE RP.

Chapter: _____

Event: _____ Date of Event: _____

Documents to Promote ASHRAE Research at Meetings and Events:

ASHRAE Research Honor Roll
(October Journal Reprint)

Specialty Research Topic Fliers _____

Promotional Items for Chapter Meetings and/or Events:

RP Hero Sticker _____

ASHRAE RP Pens _____

ASHRAE RP Golf Tees/Marker Pack _____

ASHRAE RP Sunscreen _____

ASHRAE Koozie _____

Heating without Research Matches _____

RP Oval Window Decals _____

ASHRAE RP Band-Aid _____

ASHRAE RP Hand Sanitizer *New!* _____

Please Note:

These giveaways are limited quantity. Please choose only one item to order for your event. If you would like a variety of items, please contact Staff and we will try to accommodate your request.

Items to Assist with Calling Campaigns and Solicitations:

ASHRAE RP Letterhead _____

ASHRAE #10 Envelopes _____

ASHRAE RP #9 Return Envelopes _____

Notecards & Envelopes _____

Calling Kit *Now on-line!* _____

For Special Guests or Major Donors visiting the Chapter:

RP Ceramic Mug *limit 3 _____

Please Note:

These items are only to be ordered for special guests, speakers, or recognition of a Major Donor. Please contact Staff if you need more than 3.

SHIP TO:

Phone Number (for Shipping): _____

EMAIL ORDER TO:

RP@ashrae.org

ASHRAE RP: Chapter Full Circle

Please use this form to list the chapter officers giving for Full Circle.

Chapter Name _____ Date _____

Online?

| <u>Title</u> | <u>Officer's Name*</u> | <u>Date</u> | <u>ID #</u> | <u>(Yes/No)</u> | <u>Amount</u> |
|-----------------|------------------------|-------------|-------------|-----------------|---------------|
| President | _____ | _____ | _____ | _____ | _____ |
| President Elect | _____ | _____ | _____ | _____ | _____ |
| Vice President | _____ | _____ | _____ | _____ | _____ |
| Treasurer | _____ | _____ | _____ | _____ | _____ |
| Secretary | _____ | _____ | _____ | _____ | _____ |
| RP Chair | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ | _____ |

* If a position is not filled, write "N/A" for Officer's Name

Please make sure these items are completed:

Full Circle:

- Individual's name listed
- \$100 given (min)
- Completed by November 15

Full Circle Plus:

- Full Circle completed
- Officer listed on CIQ
- Completed by November 15

This form must be submitted to Headquarters by November 15 in order to qualify for PAOE Points.

Send to your RVC and:

ASHRAE RP
 180 Technology Parkway
 Peachtree Corners, GA 30092
 E-mail: RP@ashrae.org

ASHRAE RP: Volunteer Committee

Please use this form to list the members of your *Volunteer Committee*.

RP Chair: _____

Chapter: _____

Date: _____

VOLUNTEER NAME

- 1) _____
- 2) _____
- 3) _____
- 4) _____
- 5) _____
- 6) _____
- 7) _____
- 8) _____
- 9) _____
- 10) _____
- 11) _____
- 12) _____
- 13) _____
- 14) _____
- 15) _____

The *Volunteer Committee* can be used for your chapter's Calling Campaigns (in November, March and May), special events, and for researching or contacting prospective donors.

This form must be submitted to Headquarters by **October 15** in order to qualify for PAOE Points.

Send to:

RP@ashrae.org



Department of the Treasury
Internal Revenue Service
P.O. Box 2508, Room 4010
Cincinnati OH 45201

In reply refer to: 4077989886
Sep. 17, 2019 LTR 4167C 0
13-5675095 000000 00

00025639
BODC: TE

AMERICAN SOCIETY OF HEATING
& A-C ENGINEERS
IR NE
ATLANTA GA 30329-2305

003723

Employer identification number: 13-5675095
Group exemption number: 2475

Dear Taxpayer:

This is in response to your request dated Aug. 26, 2019, for information about your tax-exempt status.

Our records indicate we issued a determination letter to you in November 1973, and you're currently exempt under Internal Revenue Code (IRC) Section 501(c)(3).

We also recognized the subordinates on the list you submitted as exempt from federal income tax under IRC Section 501(c)(3).

For federal income tax purposes, donors can deduct contributions they make to you as provided in IRC Section 170. You're also qualified to receive tax deductible bequests, legacies, devises, transfers, or gifts under IRC Sections 2055, 2106 and 2522.

Because IRC Section 170(c) describes your subordinate organizations, donors can deduct contributions they make to them.

Please refer to www.irs.gov/charities for information about filing requirements. Specifically, IRC Section 6033(j) provides that, if you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked on the filing due date of the third required return or notice.

In addition, each subordinate organization is subject to automatic revocation if it doesn't file a required return or notice for three consecutive years. Subordinate organizations can file required returns or notices individually or as part of a group return.

For tax forms, instructions, and publications, visit www.irs.gov or call 1-800-TAX-FORM (1-800-829-3676).

If you have questions, call 1-877-829-5500 between 8 a.m. and 5 p.m., local time, Monday through Friday (Alaska and Hawaii follow Pacific Time).

DONOR CALL SHEETS – Volunteer’s Name: _____

DONOR INFORMATION: «Acknowledgement_Name» **ID#:** «ID_» **CHAPTER:** «Chapter»

Contact: «Contact_Name»

ADDRESS:

«Address1»
«Address2»
«City», «State» «Zip»

Phone: «Phone»

Email: «Pref_Email»

| DONOR’S GIVING HISTORY | | | | | |
|------------------------|--------------------|--------------------|--------------------|--------------------|---------------------|
| 2016-17 | 2015-16 | 2014-15 | 2013-14 | 2012-13 | ASK FOR THIS AMOUNT |
| \$«M_201620 17» | \$«M_201520 16» | \$«M_201420 15» | \$«M_201320 14» | \$«M_201220 13» | \$«Ask_» |

CALL RESULTS:

| CALL | DATE | TIME | CODE | NOTES |
|------|------|------|------|-------|
| 1 | | | | |
| 2 | | | | |
| 3 | | | | |

CODES:

| | | |
|-------------------------|-------------------------|-----------------------|
| NA: No Answer | P: Made a Pledge | DEC: Declined / No |
| CB: Call Back | AC: Already Contributed | NO/\$: Can't afford |
| X: Disconnected/Wrong # | UP: Unspecified Pledge | DNT: Don't Call Again |
| LD: Long Distance Call | WC: Will consider | NO/D: Deceased |

PLEDGE: \$ _____ **SPECIFIED BILLING DATE:** _____
CHARGE: \$ _____ / / VISA / / AMEX / / MC (other than Canada)
CARD NUMBER: _____ **EXP DATE:** _____
NAME ON CARD: _____

Thank you for your support!

Thank you for your pledge of support in the amount of \$ _____

You may use a credit card to fulfill your pledge by completing the charge information on the inside flap of the reply envelope.

Please return this reminder slip with your payment for proper crediting.

ID#: «ID_» Chapter: «Chapter»

«Acknowledgement_Name»
«Contact_Name»
«Address1»
«Address2»
«City», «State» «Zip»



ASHRAE RP: Endowed Gift

Use this form to give a restricted RP gift via the ASHRAE Foundation

DONOR

Organization Individual

Name: _____ Contributor Number: _____

Address: _____ Phone Number: _____

City, State, Zip: _____

Restricted RP Fund

New Fund Existing Fund

benefiting Research YEA Education General Scholarships

If no fund is selected, the endowed gift will default to Research

Name of Fund: _____

Chapter to Credit: _____

Amount of Gift*: _____

* Please note that the minimum gift amount is \$3,000, payable over 3 years. For gifts less than this amount, please contact staff for details.

- Check enclosed
- Please charge my credit card:

Name on the card: _____

____ American Express ____ MasterCard ____ Visa

Card #: _____ Exp. Date: _____

Credit card contributions may be faxed to (678) 539-2147.

Please send your gift to:

ASHRAE RP
180 Technology Parkway
Peachtree Corners, GA 30092

I understand that this restricted RP Campaign gift will be invested by Foundation BOT and 5% income on invested funds benefiting the fund noted above.

Signature: _____

Donor Recognition

Saying Thank You! to 2021-22 Donors

- Run your chapter Donor Detail report for 2022 to view your donors from last year.
- Schedule a donor recognition event at an upcoming meeting! If an in-person meeting isn't possible this year, try a virtual meeting or write an article about your donors for the chapter newsletter.
- Choose the activities of your donor recognition meeting carefully to encourage attendance. Consider an approachable technical topic, honoring other chapter members, or a 100% celebratory meeting.

Need a copy of your list? Contact RP staff!



Questions? Comments? Concerns? Need help?

CALL YOUR RP STAFF!

Your Headquarters staff is here to make sure your campaign is successful. Let us know what we can do to help you and your chapter!

Julia Mumford, RP Manager

JMumford@ashrae.org
(404)636-8400 ext. 1114

Megan Gotzmer, RP Assistant Manager

MGotzmer@ashrae.org
(404)636-8400 ext. 1112

Headquarters Mailing Address:

180 Technology Parkway
Peachtree Corners, GA 30092
(404) 636-8400 - main switchboard

www.ashrae.org/rp

www.ashrae.org/contribute

www.ashraerp.com