



# QUICK GUIDE TO: IMPORTANT INFORMATION

Kick off your campaign with ease!

## Important Dates:

Donor Rec Request: September 1  
Volunteer Committee - October 15  
Full Circle - November 15  
30% of Goal - December 1  
Scholarship Goal - March 31  
60% of Goal – March 31  
Succession Form - April 1  
100% of Goal - June 15  
Campaign Ends/All Donations Due - June 30

## Electronic Resources:

[www.ashraerp.com](http://www.ashraerp.com)

- All things RP!

### Spreadsheets

- Track your campaign: year-to-date, goal, scholarship goal, PAOE points, etc.

### Real Time Reports

- Run these reports to find out who has given, year-to-date totals, scholarship totals, previous donors (calling campaigns), etc.
- To access these reports, you will need to be listed as the RP Chair on your chapter roster (CIQ)

### Training

- Download the RP Training Manual
- Electronic Resources

### Important Forms

- PAOE Reporting Links
- Other important forms related to the RP Campaign

### ASHRAE STAFF:

Julia Mumford, Manager  
[JMumford@ashrae.org](mailto:JMumford@ashrae.org)  
678.539.1114

Sami Rowan  
[SRowan@ashrae.org](mailto:SRowan@ashrae.org)

Megan Gotzmer  
[MGotzmer@ashrae.org](mailto:MGotzmer@ashrae.org)

### YOUR RVC:

Name \_\_\_\_\_

E-mail \_\_\_\_\_

Phone \_\_\_\_\_

### YOUR CHAPTER GOAL:

\$ \_\_\_\_\_



# QUICK GUIDE TO: SENDING IN CONTRIBUTIONS

Be sure to include a breakdown of gifts (even if it is just one gift) with all donations so it is clear who the donor is (including ID number), what fund to support, and the total amount of the gift.

## Mail

ASHRAE RP  
Attn: Julia Mumford  
180 Technology Parkway  
Peachtree Corners, GA 30092

Plan to mail all checks through express mail if you are coming up on a deadline like 30% Goal, 60% Goal, 100% Goal, and June 30.

## Online

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

This will be the fastest and easiest way to ensure your gift has made it to Headquarters before a deadline.

When multiple donors are giving via one credit card, please type "See Breakdown" in the Donor Name field. Email us the summary form or a listing of donors (please include the correct donor numbers) with the donors who should receive credit as soon as, if not before, the gift is made. If you are using a chapter debit card you will likely have to call the bank to approve any large contributions.

## E-mail

You can e-mail any contributions to Julia and/or Megan.

## Wire Transfer

E-mail Staff for the instructions to make a wire transfer.

## Call

You can reach Julia at 678-539-1114 or Megan at 678-539-1112. Please note, going on-line or e-mailing a contribution is a better method to submit donations, but calling is an option if preferred.



## **RP SPECIFIC**

**RP:** Research Promotion

**RVC:** Regional Vice Chair

**PAOE:** Presidential Award of Excellence (recognition for your hard work)

**Volunteer Committee:** Chapter members who will help you reach or exceed Goal

**Full Circle:** Financial support from your Chapter Board; leadership giving

**Donor Recognition:** Saying thank you to recent donors

**Challenge Goal:** 120% of Goal, or 105% of High Five (lower of the two)

**High Five:** The highest amount raised in five years

**APEX Award:** Hitting a new high for 4 of the past 5 years

**Succession Plan:** Planning ahead for your chapter to make the transition from one year to the next easier

## **FUNDRAISING SPECIFIC**

**Endowment or Endowed Fund:** Donations held in the Foundation to generate interest. The interest is then spent on the fund being supported by the endowment. The 5% interest does count in your Chapter RP Campaign each year.

**Scholarship:** A type of endowed fund, this is held by the Foundation and supported by donations. Interest is awarded to a student – the 5% does NOT count in your Chapter RP Campaign.

**LYBUNT:** Donors who gave Last Year, But Unfortunately Not This (year)

**SYBUNT:** Donors who gave Some Years, But Unfortunately Not This (year)

## **FUNDS OF THE RP CAMPAIGN**

Research/ ASHRAE Research Canada

Endowed Research

Scholarships

Education/ ASHRAE Learning Institute (ALI)

Young Engineers in ASHRAE (YEA)

RP General Fund



## **[www.ashraerp.com/training](http://www.ashraerp.com/training)**

Visit this site to find all the important information learned during this training and more!

### **Mini Trainings**

- Copies of the various mini trainings that will take place throughout the year will be uploaded here
  - o Current training videos available: RP Quick Start Training and Soliciting Corporate Donors

### **Training Manual**

- The RP Training Manual is a PDF containing anything you may need to have a successful campaign!
- We also have this manual separated into easy-to-access sections:
  - o Overview
  - o Events and Sponsorships
  - o PAOE and Calendar
  - o Donor Rec
  - o Sample Asks and Thank yous

### **Presentations**

- Several helpful presentations are available as a reminder of what was talked about during Training

### **Special Event Guides**

- You can find a variety of special event guides to help you plan and execute your next event for RP

# ANNUAL GIVING LEVELS

## Honor Roll Donor

\$150 - \$250 (*Honor Roll: Individual*)

- Antique Coin
- Listing in Annual Funds Honor Roll

## Major Donor – Antique

\$250 - \$499

- Blue Coin Holder
- Antique Coin
- Listing in Annual Funds Honor Roll

## Major Donor – Bronze

\$500 - \$999 (*Honor Roll: Organization*)

- Wooden Coin Holder
- Bronze Coin
- Listing in Annual Funds Honor Roll
- Listing on Wall of Honor (HQ)

## Major Donor – Silver

\$1,000 - \$2,499

- Wooden Coin Holder
- Silver Coin
- Listing in Annual Funds Honor Roll
- Listing on Wall of Honor (HQ)

## ASHRAE Associate

\$2,500 - \$4,999

- Wooden Coin Holder
- Gold Coin
- Listing in Annual Funds Honor Roll
- Listing on Wall of Honor (HQ)

## ASHRAE Partner

\$5,000 - \$9,999

- Wooden Coin Holder with Base
- Gold Coin
- Listing in Annual Funds Honor Roll
- Listing on Website
- Listing on Wall of Honor (HQ)

## Golden Circle

\$10,000 - \$19,999

- Trophy the first year, crystal coin following years
- Listing in Annual Funds Honor Roll
- Listing on Website
- Listing on Wall of Honor (HQ)
- Invitation and Reserved Seating to the President's Luncheon during Winter Meeting for Two Representatives
- Group Photo and Article in Insights
- Poster displaying name in Registration at Winter and Annual Meeting
- Giving level logo for e-mail signature block
- Name listed in Research Report (if applicable)

## Platinum Circle

\$20,000 - \$29,999

- Same benefits as Golden Circle
- Two Welcome Party tickets at Winter Meeting
- Two Members Night Out tickets at Winter Meeting
- Recognition on all social platforms

## Benefactor

\$30,000 - \$49,999

- Same benefits as Platinum Circle
- Badge for donor's social platforms
- Invitation and Reserved Seating to the President's Luncheon during Winter Meeting for Four Representatives
- One Full registration at Winter Meeting
- Four Welcome Party tickets at Winter Meeting
- Four Members Night Out tickets at Winter Meeting

## Patron

\$50,000 - \$99,999

- Same benefits as Benefactor
- Glass Trophy the first year, crystal coin following years
- One full registration at Winter and Annual Meeting
- Four Welcome Party tickets at Winter and Annual Meeting
- Four Members Night Out tickets at Winter and Annual Meeting
- Recognition on ASHRAE's podcast one time (corporate only)

# ONE TIME GIVING LEVELS

## Leader

\$100,000 - \$249,999

- Glass Trophy presented at the President's Luncheon
- Listing in Annual Funds Honor Roll
- Listing on Wall of Honor (HQ)
- Acknowledgement on website
- Recognition on all social platforms
- Recognition on ASHRAE's podcast two times (corporate only)
- Giving level logo for e-mail signature block
- Badge for donor's social platforms
- Name listed in Research Report (if applicable)
- Photo and article in Insights
- Two Full Registrations at Winter and Annual Meeting for one Society Year
- Two tickets to all Social events at Winter and Annual Meeting for one Society Year
- Invitation and Reserved seating at the President's Luncheon for one Society Year
- 1-2 min recognition speech at President's Luncheon at Annual Meeting

## Innovator

\$250,000 - \$499,999

- Same benefits as Leader
- Recognition on ASHRAE's podcast four times (corporate only)
- Presidential Member hosted table at Members Night Out for Two for one Society Year

## Visionary

\$500,000 - \$999,999

- Same benefits as Innovator
- 3-5 min recognition speech at President's Luncheon at Winter Meeting
- Two Full Registrations at Winter and Annual Meeting for two Society Years
- Two tickets to all Social events at Winter and Annual Meeting for two Society Years

## Pinnacle

\$1,000,000+

- Same benefits as Visionary
- Crystal Trophy presented at the President's Luncheon
- Recognition on ASHRAE's podcast five times (corporate only)
- One-time honorary Foundation Trustee
- Lifetime Full Registrations at Winter and Annual Meeting for Two
- Lifetime tickets to all Social events at Winter and Annual Meeting for Two
- Reserved seats at the Plenary session for Two
- ASHRAE to produce a two-minute appreciation video to run on website and HQ building

# 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 Fund\*:** \_\_\_\_\_

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

**Amount of This Gift (if less than fund total):** \_\_\_\_\_

- 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 678-539-2111*

## **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: \_\_\_\_\_

# Electronically Managing your RP Campaign

## **The Main Sites:**

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

- Public information
- Links to brochures and informational items
- Research projects by topic
- Contribute on-line link

[www.ashraerp.com](http://www.ashraerp.com)

- Mainly for RP Chairs
- Real Time reports and the Spreadsheet
- Training Manuals
- Important forms
- Chapter support information

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

- Contribute on-line!

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

- Technical activities reports
- Projects for bid
- Final reports for research projects
- How to submit a proposal

## ***Have Questions? Need Help?***

**Julia Mumford, RP Manager**

[JMumford@ashrae.org](mailto:JMumford@ashrae.org)

678-539-1114

## **Run your Real Time Reports**

- Go to [www.ashraerp.com](http://www.ashraerp.com)
- Select “Real Time Reports” on the left
- Log-in using your member e-mail and password (*if you need this info, contact Staff or go through “Forgot Password” on ashrae.org*)

### **Available Reports**

#### 10 Year History:

- Used to find LYBUNTs and SYBUNTs
  - Send letters and conduct calling campaigns
- Past giving history
- How and when a donor gave
- Finding ID/member numbers

#### Donor Detail:

- Year-To-Date donors
- Run monthly
- Credited properly
- On-line gifts

#### Chapter Officers:

- Used for Full Circle and FC+
- Contact information for your board

### **Make Note:**

- The 10 Year History report is based on the Home chapter. If a donor with your chapter listed as the Home chapter, but gives to another chapter, this will reflect on your 10 Year History even though your chapter is not receiving credit for this gift.
- Your Donor Detail report is the best report to use when trying to find your year-to-date total. This report pulls by gift, not donor.
- These are updated as gifts are entered into the Accounting database.

## **The Spreadsheet**

- Found on [www.ashraerp.com](http://www.ashraerp.com)
- Updated once a month through March then twice a month through the end of the Campaign
- Tracks your campaign to date and compares to last year’s results
- Tracks your chapter’s PAOE totals