

ASHRAE REGION IX LEADERSHIP NEWSLETTER

October 2021

LEADERS,

Thanks for your diligence in following through with my requests from last week. Hopefully these newsletters keep your ASHRAE commitments and longer-term goals top of mind as we are officially rolling into the 2021-2022 season. It may be hard to believe, but you need to start now with selecting the leadership for next session. I would challenge your chairs to think about whether they are staying on another year or need to search out a replacement or more co-chairs and developing them through Leadership Weekends or [Chapter Leadership Academy](#) (as soon as possible). A reminder that each chapter needs to have a nominating committee for board positions (that does not comprise the board or current committee members). See more info in the Chapter Operations Manual.

President Elects!!! Please mark your calendars for **April 29th and 30th (Friday and Saturday) for IN-PERSON President Elect Training in Salt Lake City, UT**. We will start on noon Friday and end at noon Saturday with some kind of fun outing on Friday night. I will send you more information direct once everything is finalized. Regional Leaders, we will follow up with a meeting Saturday afternoon.

I have not yet resumed scheduling RVC visits, however if your chapter would like a specific RVC or myself to visit your chapter please let me know and I will arrange. A reminder that DL travel is still on, however it is at the discretion of the DL. Especially with air travel now, please be sure you have a back-up plan for any presenters traveling in.

Finally, we are coming up on the fall board of directors meeting and grand opening of the new HQ which I am looking very forward to attending. Not long after that, ASHRAE is on for hosting the Winter Conference in Las Vegas, NV!! Please see more info in the link below and promote to your membership. A virtual option is also being offered.

<https://www.ashrae.org/conferences/2021-virtual-winter-conference>

Keep up with your PAOE and feel free to contact me or your other regional leadership with any issues. And be sure to continue to endorse attendance at our first EVER [Regional Technical Session](#) on Thursday at noon CST. Register at the link FOR FREE and be entered to win one of four \$50 gift cards!

~Tyler

TO-DO LIST

1. Full Circle -For all chapter and regional leadership, please remember that Full Circle RP contributions are due November 15th. This is an important part of the RP campaign to demonstrate support at all levels of leadership.
2. File your chapter taxes. **Due Nov 15th.** Copy our treasurer, Mike Dallon (mdallon@cea-ut.com). The non-profit status of the entire society depends on it.
3. Start selecting chapter leadership for next session and form your nominating committee.

PAOE Spotlight (new feature!!)

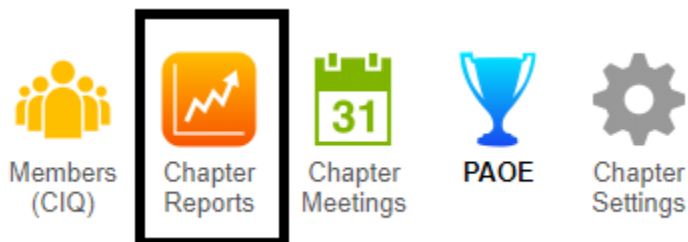
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500 points for establishing or 300 points for updating annually a **Chapter Long-Term Strategic Plan** (min 3 years, 5 suggested). Plan to be submitted to DRC for approval not later than January 1

A strategic plan ensures the legacy and continuation of good practices from your leadership and completion of longer term goals. There are many tools and guides to developing a strategic plan. If this is your first one, focus on smaller achievable goals and how specifically you can achieve them. ASHRAE society strategic plan is linked below:

<https://www.ashrae.org/about/strategic-plan>

For any PAOE points where you have to assess member's information there is probably a pre-established report for that. Under PAOE, select Chapter Reports. I wanted to highlight Committee Participants report that will list all your members that are involved with an ASHRAE society committee. This report (while highly informational) will help with a number of PAOE point calculations.



| Report (XLS) | Description |
|--|---|
| YEA Members | Affiliates, Associates and Members who are 35 years of age or younger based on the age demographics they included in their member bio. |
| Cancellation List | Real-time report: Cancelled in the last 36 months from today. This is for chapters who plan to do a recruitment campaign by contacting previously cancelled members. |
| Rejoined or Reinstated List for PAOE | This is a PAOE report by checking for previous memberships and report back if someone rejoined or reinstated. |
| Chapter Master List fast | The data selected is from the end of the previous day.* |
| Chapter Master List | Real-time report outputs member dates in yyyy-mm-dd format. Takes a few minutes to process.* |
| Chapter Master List Condensed | Condensed version of Chapter Master List. |
| Non-Member Prospects | Contact to join ASHRAE |
| Chapter Sign In Sheet | Create a Chapter Sign in Sheet |
| Committee Participants | Participants by Chapter |
| Chapter Officer Roster | This report lists the chapter positions for the current Society year. CIQ_questions@ashrae.org |
| Chapter Information Questionnaire | Chapter positions for the future society year. (Ex: If CIQ entered on April 5, the dates are the following society year: 7/1/20XX thru 6/30/20XX): use the current date to run report CIQ_questions@ashrae.org |
| New & Canceled Detailed | Shows the member # of each person who contributes to the total count of the member dashboard. NEW |
| Lifetime Membership Status | Notice Of Lifetime Membership Change NEW |
| Students in Branches | Shows students in the branches in the chapter NEW |
| Chapter - Branch Mapping | Shows chapter to branch mapping sorted by chapter NEW |
| Chapter Member Listing with Section | Complete Chapter Member Listing with Section NEW |