



2003-2004 PRESIDENTIAL NEWSLETTER

DATE: April 2003

TO: Chapter Presidents
ASHRAE Membership Promotion Committee
ASHRAE Student Activities Committee
ASHRAE Resource Promotion Committee
ASHRAE Technical, Energy and Government Activities Committee
ASHRAE Chapter Programs Committee
Regional Historians
Assistant Regional Chairs
Board of Directors

FROM: Richard Rooley

SUBJECT: 2003-2004 PRESIDENTIAL AWARD OF EXCELLENCE

Our chapters play a vital role in helping the Society achieve its goals. This year's PAOE has been revised to reflect the recommendations made by Regions Council based on input from motions received from the Chapters Regional Conferences and from the grass roots committees. It recognizes its "Diversity" of our members and Society as follows:

Chapter Programs

- 25 points for joint meetings with more than two other associations
- 25 points for a minimum of two programs on business, management or legal education (50 points if it is a separate half-day event)
- 25 points for a program which is a debate on a controversial ASHRAE related issue

Membership Promotion

- 25 points for each new "non-traditional HVAC&R" chapter member (e.g., business, management, medical or legal professionals, code officials, building owners, etc.)
- 25 points for events where stay-at-home parents can participate with their children (e.g., tour of an ice cream plant, etc.)

TEGA

- 25 points for each article published on business, management or legal education

2003-2004 PRESIDENTIAL NEWSLETTER CONT'D

The major revisions include:

- PAOE will be based on Area Assigned Members (AAM) – Defined as the “Paid Member” count as of July 1. This figure will include all member grades, except students.
- Multiple options for reporting have been removed from all categories.
- Bonus points have been removed from all categories and have been incorporated into the Criteria for PAOE to give more opportunities for reaching minimum.
- Chapter Operations: Points for mentoring have been moved to Membership Promotion.
- Student Activities formula was revised based on recommendation from the Student Activities Committee.
- Chapter Programs: Restructured points for presenting an ALI Course into three hour segments. Points for social events moved to Chapter Operations.
- Historical: No major revisions.
- Membership Promotion: No major revisions except for using Area Assigned Members as the benchmark instead of chapter dues paying members.
- Resource Promotion: No major revisions (increased points for renewing each Golden Circle Investor from 150 points to 500 points).
- TEGA: No major revisions.

There are seven categories included in this year’s PAOE: Chapter Operations, Chapter Programs, Historical, Membership Promotion, Resource Promotion, Student Activities and TEGA. To achieve PAOE, the requirement is to achieve the minimum points in five of the following six categories: Chapter Operations, Chapter Programs, Membership Promotion, Resource Promotion, Student Activities and TEGA. Please refer to the criteria specified in each of the categories for guidelines in calculating the PAOE points. For additional information or clarification, please check the PAOE Frequently Asked Questions (FAQ) section on the ASHRAE website.

For the Region-At-Large (RAL) to achieve PAOE, the requirement is to achieve points in three of the following four categories: Membership Promotion, Student Activities, Chapter Programs and Chapter Operations.

I appreciate your dedication, enthusiasm and hard work in improving our great Society. I look forward to working with each of you during this Society year.

2003-2004 PAOE AWARDS

Chapters must meet “minimum” by obtaining points in the PAOE categories, there are no maximum limits on points earned.

PAOE	Minimum in five of the following six categories: Chapter Operations, Chapter Programs, Membership Promotion, Resource Promotion, Student Activities and TEGA (Note: For the Region-At-Large (RAL) to achieve PAOE, the requirement is to achieve points in three of the following four categories: Membership Promotion, Student Activities, Chapter Programs and Chapter Operations.)
Special Citation	Minimum in 5 of 6 categories, with a minimum of 4600 points
STAR	PAR in all categories
Honor Roll	PAOE for at least four consecutive years
High Honor Roll	STAR for at least four consecutive years
Premier	PAOE every year since the chapter's inception or since 1970; minimum of four years; chapter's first year is excluded
Highest Points	Highest point total for the category by size, last year's Area Assigned Members. Level 1 = Less than 100, Level 2 = 100-249, Level 3 = 250-499, Level 4 = 500 or more



2003-04 ASHRAE PAOE REPORTING

CHAPTER REPORTING

The Chapter President is responsible for reporting the points for the Chapter Operations category. Each Chapter Committee Chair is responsible for reporting the points for his/her respective category. The PAOE points will be entered directly on forms on the ASHRAE website by the Chapter Presidents and Chapter Committee Chairs by using their chapter PIN. The Chapter President and the Chapter Committee Chairs are responsible for ensuring that the data is entered and that the initial reporting is completed by November 1, 2003 and final report completed by July 30, 2004. The Regional Vice Chairs may access the website to obtain information for chapters in their Region and to enter points as indicated below. There will be no need for monthly or quarterly reports to the Regional Vice Chairs by the Chapter Committee Chairs.

On the homepage, you may access the PAOE by selecting "ASHRAE Activities and Membership" (on the left side of the screen) then click on PAOE in the Members section (on the right side of the screen). You are then prompted to enter your ASHRAE member number and PIN number (this information is on your membership card). This will bring you to the Presidential Award of Excellence page. The PAOE screen will allow you to make the following selections: (1) View the 2003-04 PAOE Newsletter (2) Update PAOE Chapter Totals and (3) View Reports. In order to view reports (read only), you will be prompted to enter in the chapter number in the appropriate field. Listed below is the PAOE Reporting Schedule for updating the PAOE points on the website.

Table with 2 columns: Month and Description. Rows include November (Reflects October 31 results), January (Reflects December 31 results), March (Reflects February 28 results), April (Reflects March 31 results), May (Reflects April 30 results), June (Reflects May 31 results), and July 30 (Final Entry of Reported Points).

DRCs and RVCs REPORTING

- Points for Planning Sessions with DRCs or RVCs resulting in setting chapter goals for the upcoming year have been established. Planning Sessions may be held in the spring before the chapter year starts (i.e. during spring President Elect Training meetings). Points to be assigned by DRC/RVC by October 1.
Points for achieving chapter goals have been established. Points within a range are to be assigned by DRC/RVC by June 30.
50 Bonus Points in each category will be given to the first chapter in each region to reach PAR. Points will be given by the DRC or RVC and will be based upon their reviewing points reported on the Society webpage.
25 Points for initial reporting by November 1, 2003. Points to be assigned by DRC for Chapter Operations and by RVC for other categories.

ASHRAE HEADQUARTERS REPORTING

The PAOE Point Summary data can be obtained for each chapter in the Region from the ASHRAE website. Resource Promotion points will be calculated at Headquarters.

PAOE REPORTING PROCEDURES

INSTRUCTIONS ON ACCESSING THE ASHRAE HOME PAGE TO ENTER YOUR PAOE POINTS

1. Log onto the ASHRAE site: <http://www.ashrae.org>.
2. On the homepage, you may access the PAOE by selecting “ASHRAE Activities and Membership” (on the left side of the screen) then click on *PAOE* in the Members section (on the right side of the screen).
3. You are then prompted to enter your ASHRAE membership number and your PIN number (this information is on your membership card). Click on Submit.
4. This will take you to the Presidential Award of Excellence (PAOE) page.
5. The PAOE screen will allow you to make three selections. To enter PAOE points, select Update PAOE Chapter Totals (Authorized Users Only).
6. Enter your chapters’ Logon ID number and the chapters’ password in the areas provided and click on Log In. Your chapter ID number and password are available from your chapter president or secretary.
7. When you reach the next page, select the category and click on Add Points to Selected Form.
8. The PAOE form screen has basic instructions for the user. Make note of the paragraph, which states that: “All calculations must be done before entering points.”
9. Enter your points in the New Points column in the space provided, following the instructions on the website to submit the associated points.
10. Once you have entered all of your totals in the selected category, click Submit.
11. If you would like to view your report, you can return to the Presidential Award of Excellence page and click on view reports. You will only need your chapter number. Then select the category to see what your chapter report will look like.
12. Please remember that all PAOE points reflect “Society Member Activity,” not Chapter Member activity.
13. Also, as you walk through these procedures on the website, some of the pages have a “link” to Help and Frequently Asked Questions. Please access this link for more information.

CHAPTER OPERATIONS: CRITERIA	MINIMUM	PAR										
<p><u>25</u> points for each chapter officer who attends the CRC</p> <p>* Points for each chapter member serving on at least one committee at chapter, regional or Society level including TCs, TGs, SPCs, Standing Committees and Society Presidential appointed committees:</p> <table border="0"> <thead> <tr> <th><u># of Area Assigned Members</u></th> <th><u>* Points</u></th> </tr> </thead> <tbody> <tr> <td>Level 1 = <100</td> <td>10</td> </tr> <tr> <td>Level 2 = 100-249</td> <td>8</td> </tr> <tr> <td>Level 3 = 250-499</td> <td>6</td> </tr> <tr> <td>Level 4 = 500+</td> <td>4</td> </tr> </tbody> </table> <p><u>50</u> points for conducting chapter planning meeting prior to August 1st (all officers and committee chairs)</p> <p><u>50</u> points for establishing or maintaining an operating chapter section (each section)</p> <p><u>25</u> points for establishing an Attendance Committee</p> <p><u>25</u> points for establishing a Reception Committee</p> <p><u>25</u> points for all chapter committees organized and 1st meeting of each committee held by August 31st and reported to RVC or DRC</p> <p><u>50</u> points for an active chapter website</p> <p><u>10</u> points for publishing each chapter newsletter, hardcopy or electronically</p> <p><u>25</u> points for news releases, feature stories, TV and Radio appearances and articles published promoting the work of ASHRAE</p> <p><u>25</u> points if a chapter officer hosts a visit by Regional Officer, Society Officer or Society Board of Directors Member to conduct employer dialogue/roundtable/recognition event (per key employer office visited)</p> <p><u>25</u> points for the CRC Action Committee meeting and bringing completed Executive Session worksheet to the Caucus</p> <p><u>25</u> points for each separate social event (limit 2)</p> <p><u>5</u> points for each chapter meeting with name tags</p> <p><u>DRC Reports:</u></p> <p><u>25</u> points for initial reporting by November 1st</p> <p><u>50</u> points for the first chapter in each region to reach PAR (points to be given based upon DRC reviewing points reported on the Society webpage)</p> <p><u>25</u> points for chapter nominating committee report (with all chapter officers & committee chair positions filled) distributed by the April 2004 chapter meeting (Points assigned by May 15, 2004)</p> <p><u>25</u> points for President-Elect attendance at President-Elect Training</p> <p><u>75</u> points for a planning/goal setting session with DRC resulting in written measurable objectives. (points assigned by DRC by October 1)</p> <p><u>0 to 75</u> points for achieving goals established in planning session (points to be assigned by DRC by June 30)</p> <p>Explanation to reach Minimum for CIQ: An additional criteria (other than points) for Minimum is the completed 2003-2004 Chapter Information Questionnaire (CIQ) sent to the DRC and Society by July 1st. DRC is responsible for determining if criteria is met. Note: All individuals serving in a chapter position must be an ASHRAE Member or Associate Member – except Webmaster and Newsletter Editor who can be a student member. No person can serve in more than one officer position (two positions for chapter less than 75 members). A chapter officer may also serve in one chapter chair position.</p>	<u># of Area Assigned Members</u>	<u>* Points</u>	Level 1 = <100	10	Level 2 = 100-249	8	Level 3 = 250-499	6	Level 4 = 500+	4	<p><u>200</u> Points plus 2003-2004 CIQ in by July 1 – Exception may be made by the DRC</p>	<p><u>400</u> Points</p>
<u># of Area Assigned Members</u>	<u>* Points</u>											
Level 1 = <100	10											
Level 2 = 100-249	8											
Level 3 = 250-499	6											
Level 4 = 500+	4											

CHAPTER PROGRAMS: CRITERIA	MINIMUM	PAR										
<p>100 points if annual attendance at chapter program meetings exceeds that of previous year (Attendance includes total for dinner, lunch or breakfast seminars or other meetings where minimum 45 minute business or technical presentation or panel discussion is held. HVAC&R courses for continuing education, technical sessions, tours and social events are excluded.)</p> <p>25 points for holding each lunch, breakfast or other meetings, in a geographical location different than the monthly meeting, in addition to eight monthly meetings (minimum 45 minute program)</p> <p>25 points for each chapter program, technical session or seminar on low temp or industrial refrigeration (minimum 45 minute presentation)</p> <p>25 points for presenting each 3-hour segment of an ASHRAE Learning Institute (ALI) course. (Example: a 3-hour course qualifies for 25 points...a 6-hour course qualifies for 50 points...a 9-hour course qualifies for 75 points, a 12-hour course qualifies for 100 points etc.)</p> <p>15 points for completing the Chapter Program Evaluation Summary form (per meeting) and submitting to RVC within two months of meeting</p> <p>100 points if the total attendance for the year at all Chapter Program meetings exceeds * percent of area assigned members</p> <table border="0" data-bbox="69 568 966 738"> <thead> <tr> <th data-bbox="69 568 546 592"><u># of Area Assigned Members</u></th> <th data-bbox="546 568 966 592"><u>* Percent</u></th> </tr> </thead> <tbody> <tr> <td data-bbox="69 625 546 649">Level 1 = <100</td> <td data-bbox="546 625 966 649">200%</td> </tr> <tr> <td data-bbox="69 657 546 682">Level 2 = 100-249</td> <td data-bbox="546 657 966 682">160% with a minimum of 200 attendees</td> </tr> <tr> <td data-bbox="69 690 546 714">Level 3 = 250-499</td> <td data-bbox="546 690 966 714">140% with a minimum of 399 attendees</td> </tr> <tr> <td data-bbox="69 722 546 747">Level 4 = 500+</td> <td data-bbox="546 722 966 747">125% with a minimum of 699 attendees</td> </tr> </tbody> </table> <p>Chapter Program meetings are tech sessions, technical tours, dinner, lunch, breakfast, seminars or other chapter meetings which include a business or technical presentation or panel discussion (minimum 45 minutes). More than one meeting may be held any month. HVAC&R courses for Continuing Education and social events are excluded.</p> <p>50 points for completing and publishing a plan for monthly chapter programs with invited speakers by October 1st</p> <p>50 points for holding at least eight monthly chapter meetings per year with at least six including ASHRAE industry related programs</p> <p>15 points for sending announcements of each chapter monthly meeting at least 5 working days prior to monthly meeting (per monthly meeting)</p> <p>25 points for holding each joint meeting with other industry related societies (limit 2)</p> <p>25 points for joint meetings with more than two other associations</p> <p>25 points for a minimum of two programs on business, management or legal education (50 points if it is a separate half-day event)</p> <p>25 points for a program which is a debate on a controversial ASHRAE related issue</p> <p>10 points for each hour of a chapter technical session or seminar</p> <p>25 points for the committee chair (incoming for spring CRCs) attending the committee CRC workshop</p> <p>15 points for a summary report in Chapter Newsletter on previous month's program (per monthly meeting, Social Events do not count)</p> <p>10 points for chapter program announcements (including title of presentation) in the local "Community Meetings Announcements" (or equivalent) section in local newspaper (points per monthly meeting)</p> <p><u>RVC Reports:</u></p> <p>25 points for initial reporting by November 1st (RVC to assign)</p> <p>50 points for the first chapter in each region to reach PAR (points to be assigned by RVC and will be based upon RVC reviewing points reported on the Society webpage)</p> <p>50 points for planning/goal setting session with RVC (points assigned by RVC by October 1)</p> <p>0 to 50 points for achieving goals established in goal-setting session with RVC (points assigned by RVC by June 30)</p>	<u># of Area Assigned Members</u>	<u>* Percent</u>	Level 1 = <100	200%	Level 2 = 100-249	160% with a minimum of 200 attendees	Level 3 = 250-499	140% with a minimum of 399 attendees	Level 4 = 500+	125% with a minimum of 699 attendees	<p>250 Points</p>	<p>500 Points</p>
<u># of Area Assigned Members</u>	<u>* Percent</u>											
Level 1 = <100	200%											
Level 2 = 100-249	160% with a minimum of 200 attendees											
Level 3 = 250-499	140% with a minimum of 399 attendees											
Level 4 = 500+	125% with a minimum of 699 attendees											

2003-2004 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

APRIL 2003

HISTORICAL: CRITERIA	MINIMUM	PAR
<p><u>50</u> points for chapter archives indexed and maintained</p> <p><u>50</u> points for chapter historical display at CRC with emphasis on ASRE Centennial (updated annually)</p> <p><u>50</u> points for publishing article on chapter, company or member history in chapter newsletter, Society publication or chapter website</p> <p><u>50</u> points for the original history and for each one year of chapter history written in current year (i.e., Society Gold Ribbon Award)</p> <p><u>50</u> points for each history of a system, person, event or a company significant to the Chapter's history (Society Gold Ribbon Award)</p> <p><u>50</u> points for each leadership recall interview</p> <p><u>50</u> points for program on history at monthly chapter meeting (limit of one)</p> <p><u>25</u> points for committee chair (incoming for spring CRCs) attending the committee CRC workshop</p> <p>Note: Histories about a system, person, event or a company, outside the realm of the chapter, are not acceptable for PAOE points or the Society Gold Ribbon Award.</p> <p>Histories for the Gold Ribbon Award shall be written by the Chapter Historian or a member of the Historical Committee from information obtained by interviewing a person knowledgeable of the history being written or from personal knowledge of the history of the system, person, event or company. Information obtained from electronic material is not acceptable.</p> <p><u>Regional Historian Reports:</u></p> <p><u>25</u> points for initial reporting by November 1st (Regional Historian to assign)</p> <p><u>50</u> points for the first chapter in each region to reach PAR (points to be assigned by Regional Historian and will be based upon the Regional Historian reviewing points reported on the Society webpage)</p>	<p><u>100</u> Points</p>	<p><u>200</u> Points</p>

2003-2004 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

APRIL 2003

MEMBERSHIP PROMOTION: CRITERIA		MINIMUM	PAR
<p><u>100</u> points if net area assigned members exceeds that of previous year</p> <p><u>50</u> points if committee size is 15 or 3% of chapter members (whichever is less)</p> <p><u>10</u> points for each upgrade from associate to member</p> <p><u>10</u> points for retention of each new member (dues paid second year)</p> <p><u>50</u> points for appointing telephone committee and conducting follow-up calls on delinquents and Society members not member of the chapter</p> <p><u>50</u> points for mentoring program (all new Society members assigned to chapter personally contacted within 60 days by letter or email with follow-up phone contact and offered mentoring)</p> <p><u>100</u> points if net area assigned members exceeds that of previous year by * Percent</p> <p><u># of Area Assigned Members</u> <u>* Percent</u></p> <p>Level 1 = <100 6%</p> <p>Level 2 = 100-249 5.0% with a minimum of 6 members</p> <p>Level 3 = 250-499 4.5% with a minimum of 12 members</p> <p>Level 4 = 500+ 4.0% with a minimum of 23 members</p> <p><u>25</u> points for membership promotion night at chapter meeting (limit of one)</p> <p><u>20</u> points for each nomination for the honor of Fellow with the appropriate documentation in accordance with the procedures as directed in the Manual for Chapter Operations (MCO)</p> <p><u>10</u> points for each nomination for the Distinguished Service Award or Exceptional Service Award with the appropriate documentation in accordance with the procedures as directed in the MCO</p> <p><u>15</u> points for each nomination for any other Society awards with the appropriate documentation in accordance with the procedures as directed in the MCO</p> <p><u>5</u> points for recognizing each new member at a monthly meeting</p> <p><u>25</u> points for publishing roster of industry representatives in hardcopy or on chapter website</p> <p><u>25</u> points for each upgrade from student member within 2 years of graduation</p> <p><u>25</u> points for the committee chair (incoming for spring CRCs) attending the committee CRC workshop</p> <p><u>25</u> points for surveying employers to identify new employees that are recent (within two years) engineering undergraduates or technical school graduates</p> <p><u>25</u> points for each new “non-traditional HVAC&R” chapter member (e.g., business, management, medical or legal professionals, code officials, building owners, etc.)</p> <p><u>25</u> points for events where stay-at-home parents can participate with their children (e.g., tour of an ice cream plant)</p> <p><u>25</u> points for each new chapter member whose age is between 23-35 (not to be combined with upgrade from student member points)</p> <p><u>RVC Reports:</u></p> <p><u>25</u> points for initial reporting by November 1st (RVC to assign)</p> <p><u>50</u> points for the first chapter in each region to reach PAR (points to be assigned by RVC and will be based upon the RVC reviewing points reported on the Society webpage)</p> <p><u>50</u> points for planning/goal setting with RVC (points assigned by RVC by October 1)</p> <p><u>0 to 50</u> points for achieving goals established in goal-setting session with RVC (points assigned by RVC by June 30)</p>		<p><u>200</u> Points</p>	<p><u>500</u> Points</p>

2003-2004 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

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RESOURCE PROMOTION: CRITERIA	MINIMUM	PAR
<p>• Contributions to Society for Education, Research, Foundation or for ASHRAE’s general support are counted towards Goal.</p> <p><u>150</u> points for reaching new High Five OR</p> <p><u>150</u> points for surpassing the Chapter’s Goal¹ by 5% OR</p> <p><u>150</u> points may be reached by reaching at least 80% of the Chapter’s Goal¹ and meeting at least three of the following categories:</p> <ul style="list-style-type: none"> • Full Circle • Training Workshop Attendance • Donor Recognition • Volunteer Committee <p>¹ Chapter Goal equals the higher of last year’s results (but not higher than that year’s Challenge Goal) or the 3-year modified average which is the two highest results in the last three years. (Campaign <i>results</i> for purposes of the PAOE formula will not include the Golden Circle Investors.)</p> <p><u>50</u> points for resource promotion nights at chapter meetings if held after January 1st <u>and</u> if in addition to having held a Donor Recognition meeting.</p> <p><u>50</u> points for creating a chapter volunteer team of 5% of chapter members with a minimum of 3 members and a maximum of 10 members required. List must be submitted to headquarters by November 1st in order to qualify.</p> <p><u>50</u> points for formal recognition of all Honor Roll level contributors. [Note: Recognition item must be <u>ordered</u> from headquarters by November 30th.]</p> <p><u>50</u> points for each special event that specifies at least 50% of the net proceeds raised are for Society-level resources. [Note: A copy of the event’s promotional literature and/or the event’s criteria must be submitted to headquarters BEFORE the event is held.]</p> <p><u>100</u> points for new High Five</p> <p><u>100</u> points for High Five Award</p> <p><u>200</u> points for Full Circle</p> <p><u>250</u> points for reaching Challenge goal (105% of High Five)</p> <p><u>50</u> points for the committee chair’s attendance at a minimum 4-hour Resource Promotion Training Workshop</p> <p><u>300</u> points for each endowed honor roll level contribution that is in addition to the donor’s current fiscal year honor roll level contribution</p> <p><u>1000</u> points for each new Golden Circle Investor acquired</p> <p><u>500</u> points for renewing each Golden Circle Investor</p> <p><u>50</u> points for an ad in chapter newsletter or website thanking and recognizing honor roll donors with a copy sent to headquarters. (limit 50 points)</p> <p>Each chapter receives a portion of the region’s allocated bonus points based on its percentage of the total region’s contributions.</p> <p>Regional / Chapter Bonus: $(C/RC) \times [(RT/CT) \times 15,000]$ C = Chapter results current year (total dollars contributed) RC = Regional result for current year RT = Regional result for prior year CT = Campaign results for prior year 15,000 = Campaign bonus points available for reallocation</p> <p><u>RVC Reports:</u></p> <p><u>50</u> points for the first chapter in each region to reach PAR (points to be awarded based on the Headquarters summary report)</p> <p><u>50</u> points for planning/goal setting session with RVC (points assigned by RVC by October 1)</p> <p><u>0 to 50</u> points for achieving objectives established in planning session with RVC (points assigned by RVC by June 30)</p>	<p align="center"><u>150</u> Points</p>	<p align="center"><u>400</u> Points</p>

2003-2004 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

APRIL 2003

STUDENT ACTIVITIES: CRITERIA	MINIMUM	PAR
<p>$5\sqrt{SMG}$ where SMG = new student member</p> <p>$30\sqrt{D/M}$ for chapter investment in student activities</p> <p>D = Dollars contributed M = Area Assigned Members</p> <p><u>25</u> points if net student membership exceeds that of previous year <u>25</u> points for each engineering college undergraduate or tech school student placed in an ASHRAE related summer intern job or part-time job during school <u>50</u> points for each active student branch where the faculty advisor is a chapter member <u>25</u> points for each K-12 student activity in which one or more chapter BOG, chapter committee or chapter member participates (other than advisor) <u>25</u> points for each post H.S. activity in which one or more chapter BOG, chapter committee or chapter member participates (other than advisor) <u>25</u> points for each teach-in by members of chapter BOG, chapter committee or chapter member per class or to an organized student group <u>25</u> points for each Students' Night at chapter meeting (limit of two) <u>50</u> points for each chapter activity with student branch including meetings, technical programs and technical tours <u>25</u> points for each student project funded <u>50</u> points for each entry in the student design competition <u>50</u> points for each scholarship to a tech or undergraduate engineering student <u>10</u> points for each student member attending a chapter monthly meeting <u>25</u> points for the committee chair (incoming for spring CRCs) attending the committee CRC workshop <u>25</u> points for each National Engineering Week Activity <u>50</u> points for sponsorship of Future Cities Competition (National Engineering Week Activity)</p> <p><u>RVC Reports:</u> <u>25</u> points for initial reporting by November 1st (RVC to assign) <u>50</u> points for the first chapter in each region to reach PAR (points to be assigned by RVC and will be based upon the RVC reviewing points reported on the Society webpage) <u>50</u> points for an individual planning/goal setting session with RVC (points assigned by RVC by October 1) <u>0 to 50</u> points for achieving goals established in goal-setting session with RVC (points assigned by RVC by June 30)</p>	<p><u>150</u> Points</p>	<p><u>400</u> Points</p>

2003-2004 PRESIDENTIAL AWARD OF EXCELLENCE (PAOE)

APRIL 2003

TEGA: CRITERIA	MINIMUM	PAR
<p><u>10</u> points for each Technology Award entry into chapter competition</p> <p><u>50</u> points for chapter Government Activities Award entry into regional competition</p> <p><u>100</u> points for hosting a Society satellite teleconference or industry related, non-commercial satellite teleconference as approved by the TEGA Committee on research or technical activities</p> <p><u>25</u> points for each presentation (minimum 15 minutes) by an ASHRAE Technical Committee (TC) or Technical Group (TG) member on status of TC or TG efforts (Research activities, Standards activities, Handbook activities, etc.) to the local chapter (one per meeting, limit 4 talks per year)</p> <p><u>25</u> points for each handbook chapter reviewed by a chapter member, review submitted through ASHRAE website and presentation (minimum 15 minutes) made to local chapter</p> <p><u>25</u> points for each chapter Technology Award entry into Regional competition</p> <p><u>50</u> points for each chapter Technology Award entry into Society competition</p> <p><u>25</u> points for each standard or guideline reviewed by a chapter appointed committee of at least three people and review submitted to cognizant group</p> <p><u>25</u> points for each Government Activities Chapter Program (limit of two)</p> <p><u>25</u> points for each article published in chapter newsletter or chapter website with a refrigeration, technical, energy or government activities emphasis</p> <p><u>25</u> points for each article published on business, management or legal education</p> <p><u>25</u> points for each contact (meeting) with government officials (all government levels including school boards) or business and professional groups on ASHRAE related subjects by a member of the chapter BOG or chapter committee member</p> <p><u>100</u> points for establishing and maintaining an ASHRAE library for technology transfer (includes display at chapter meetings and local access to materials such as handbooks, standards, technical papers, information on ASHRAE and information on ordering materials)</p> <p><u>50</u> points for TEGA Committee with a minimum of four members (Chair, Refrigeration member, Technology Transfer member and Government Activities member)</p> <p><u>25</u> points for the committee chair (incoming for spring CRCs) attending the committee CRC workshop</p> <p><u>25</u> points for each low temp or industrial refrigeration program, seminar or tour</p> <p><u>25</u> points for any chapter that submits an entry for the Milton Garland Award</p> <p><u>RVC Reports:</u></p> <p><u>25</u> points for initial reporting by November 1st (RVC to assign)</p> <p><u>50</u> points for the first chapter in each region to reach PAR (points to be assigned by RVC and will be based upon the RVC reviewing points reported on the Society webpage)</p> <p><u>50</u> points for an individual planning/goal setting session with RVC (points assigned by RVC by October 1)</p> <p><u>0 to 50</u> points for achieving goals established in goal-setting session with RVC (points assigned by RVC by June 30)</p>	<p><u>150</u> Points</p>	<p><u>400</u> Points</p>

**PAOE 2003-2004
CHAPTER OPERATIONS SAMPLE REPORTING FORM
(MINIMUM = 200 POINTS PLUS 2003-2004 CIQ IN BY JULY 1,
EXCEPTION MAY BE MADE BY DRC, PAR = 400 POINTS)**

The Chapter President and the Chapter Committee Chair are responsible for ensuring that the data is entered and that the reporting is completed by June 30, 2004. **"SAMPLE COPY - DO NOT USE FOR REPORTING - ALL REPORTING MUST BE DONE VIA THE WEBSITE ON THE INTERACTIVE FORMS. PRINTED COPIES MAILED, FAXED OR EMAILED WILL NOT BE ACCEPTED."**

MINIMUM POINTS	YEAR-TO-DATE										
For each chapter officer who attends the CRC – 25 points											
* Points for each chapter member serving on at least one committee at chapter, regional or Society level including TCs, TGs, SPCs, Standing Committees and Society Presidential appointed committees: <table style="width: 100%; border: none;"> <tr> <td style="text-align: left;"><u># of Area Assigned Members</u></td> <td style="text-align: center;"><u>* Points</u></td> </tr> <tr> <td>Level 1 = <100</td> <td style="text-align: center;">10</td> </tr> <tr> <td>Level 2 = 100-249</td> <td style="text-align: center;">8</td> </tr> <tr> <td>Level 3 = 250-499</td> <td style="text-align: center;">6</td> </tr> <tr> <td>Level 4 = 500+</td> <td style="text-align: center;">4</td> </tr> </table>	<u># of Area Assigned Members</u>	<u>* Points</u>	Level 1 = <100	10	Level 2 = 100-249	8	Level 3 = 250-499	6	Level 4 = 500+	4	
<u># of Area Assigned Members</u>	<u>* Points</u>										
Level 1 = <100	10										
Level 2 = 100-249	8										
Level 3 = 250-499	6										
Level 4 = 500+	4										
For conducting chapter planning meeting prior to August 1 st (all officers and committee chairs) – 50 points											
For establishing or maintaining an operating chapter section (each section) – 50 points											
For establishing an Attendance Committee – 25 points											
For establishing a Reception Committee – 25 points											
For all chapter committees organized and 1 st meeting of each committee held by August 31 st and reported to RVC or DRC – 25 points											
For an active chapter website - 50 points											
For publishing each chapter newsletter, hardcopy or electronically – 10 points											
For news releases, feature stories, TV and Radio appearances and articles published promoting the work of ASHRAE – 25 points											
If a chapter officer hosts a visit by Regional Officer, Society Officer or Society Board of Directors Member to conduct employer dialogue/roundtable/recognition event (per key employer office visited) – 25 points											
For the CRC Action Committee meeting and bringing completed Executive Session worksheet to the Caucus – 25 points											
For each separate social event (limit 2) – 25 points											
For each chapter meeting with name tags – 5 points											
<u>DRC REPORTS:</u>											
For initial reporting by November 1 st – 25 points											

For the first chapter in each region to reach PAR (points to be given based upon DRC reviewing points reported on the Society webpage) – 50 points	
For the chapter nominating committee report (with all chapter officers & committee chair positions filled) distributed by April 2004 chapter meeting (Points assigned by May 15, 2004) – 25 points	
For President-Elect attendance at President-Elect Training – 25 points	
For a planning/goal setting session with DRC resulting in written measurable objectives. (points assigned by DRC by October 1) – 75 points	
For achieving goals established in planning session (points to be assigned by DRC by June 30) – 0 to 75 points	
<p>Explanation to reach Minimum for CIQ: An additional criteria (other than points) for Minimum is the completed 2003-2004 Chapter Information Questionnaire (CIQ) sent to the DRC and Society by July 1st. DRC is responsible for determining if criteria is met. Note: All individuals serving in a chapter position must be an ASHRAE Member or Associate Member – except Webmaster and Newsletter Editor who can be a student member. No person can serve in more than one officer position (two positions for chapter less than 75 members). A chapter officer may also serve in one chapter chair position.</p>	
ENTER TOTAL POINTS (THERE IS NO LIMIT TO THE MAXIMUM NUMBER OF POINTS EARNED.)	

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**PAOE 2003-2004
CHAPTER PROGRAMS SAMPLE REPORTING FORM
(MINIMUM = 250 POINTS, PAR = 500 POINTS)**

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MINIMUM POINTS	YEAR-TO-DATE										
If annual attendance at chapter program meetings exceeds that of previous year (Attendance includes total for dinner, lunch or breakfast seminars or other meetings where minimum 45 minute business or technical presentation or panel discussion is held. HVAC&R courses for continuing education, technical sessions, tours and social events are excluded.) – 100 points											
For holding each lunch, breakfast or other meetings, in a geographical location different than the monthly meeting, in addition to eight monthly meetings (minimum 45 minute program) – 25 points											
For each chapter program, technical session or seminar on low temp or industrial refrigeration (minimum 45 minute presentation) – 25 points											
For presenting each 3-hour segment of an ASHRAE Learning Institute (ALI) course. (Example: a 3-hour course qualifies for 25 points...a 6-hour course qualifies for 50 points...a 9-hour course qualifies for 75 points, a 12-hour course qualifies for 100 points, etc.) – 25 points											
For completing the Chapter Program Evaluation Summary form (per meeting) and submitting to RVC within two months of meeting – 15 points											
<p>If the total attendance for the year at all Chapter Program meetings exceeds * percent of area assigned members – 100 points</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;"><u># of Area Assigned Members</u></th> <th style="text-align: left;"><u>* Percent</u></th> </tr> </thead> <tbody> <tr> <td>Level 1 = <100</td> <td>200%</td> </tr> <tr> <td>Level 2 = 100-249</td> <td>160% with a minimum of 200 attendees</td> </tr> <tr> <td>Level 3 = 250-499</td> <td>140% with a minimum of 399 attendees</td> </tr> <tr> <td>Level 4 = 500+</td> <td>125% with a minimum of 699 attendees</td> </tr> </tbody> </table> <p>Chapter Program meetings are tech sessions, technical tours, dinner, lunch, breakfast, seminars or other chapter meetings which include a business or technical presentation or panel discussion (minimum 45 minutes). More than one meeting may be held any month. HVAC&R courses for Continuing Education and social events are excluded.</p>	<u># of Area Assigned Members</u>	<u>* Percent</u>	Level 1 = <100	200%	Level 2 = 100-249	160% with a minimum of 200 attendees	Level 3 = 250-499	140% with a minimum of 399 attendees	Level 4 = 500+	125% with a minimum of 699 attendees	
<u># of Area Assigned Members</u>	<u>* Percent</u>										
Level 1 = <100	200%										
Level 2 = 100-249	160% with a minimum of 200 attendees										
Level 3 = 250-499	140% with a minimum of 399 attendees										
Level 4 = 500+	125% with a minimum of 699 attendees										
For completing and publishing a plan for monthly chapter programs with invited speakers by October 1 st – 50 points											
For holding at least eight monthly chapter meetings per year with at least six including ASHRAE industry related programs – 50 points											
For sending announcements of each chapter monthly meeting at least 5 working days prior to monthly meeting (per monthly meeting) – 15 points											
For holding each joint meeting with other industry related societies (limit 2) – 25 points											
For joint meetings with more than two other associations – 25 points											

For a minimum of two programs on business, management or legal education (50 points if it is a separate half-day event) – 25 points	
For a program which is a debate on controversial ASHRAE related issue – 25 points	
For each hour of a chapter technical session or seminar – 10 points	
For the committee chair (incoming for spring CRCs) attending the committee CRC workshop – 25 points	
For a summary report in Chapter Newsletter on previous month’s program (per monthly meeting, Social Events do not count) – 15 points	
For chapter program announcements (including title of presentation) in the local “Community Meetings Announcements” (or equivalent) section in local newspaper (points per monthly meeting) – 10 points	
<u>RVC REPORTS:</u>	
For initial reporting by November 1 st (RVC to assign) – 25 points	
For the first chapter in each region to reach PAR (points to be assigned by RVC and will be based upon RVC reviewing points reported on the Society webpage) – 50 points	
For planning/goal setting session with RVC (points assigned by RVC by October 1) – 50 points	
For achieving goals established in goal-setting session with RVC (points assigned by RVC by June 30) – 0 to 50 points	
ENTER TOTAL POINTS (THERE IS NO LIMIT TO THE MAXIMUM NUMBER OF POINTS EARNED)	

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**PAOE 2003-2004
HISTORICAL SAMPLE REPORTING FORM
(MINIMUM = 100 POINTS, PAR = 200 POINTS)**

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MINIMUM POINTS	YEAR-TO-DATE
For chapter archives indexed and maintained – 50 points	
For chapter historical display at CRC with emphasis on ASRE Centennial (updated annually) – 50 points	
For publishing article on chapter, company or member history in chapter newsletter, Society publication or chapter website – 50 points	
For the original history and for each one year of chapter history written in current year (i.e., Society Gold Ribbon Award) – 50 points	
For each history of a system, person, event or a company significant to the Chapter’s history (Society Gold Ribbon Award) – 50 points Note: Histories about a system, person, event or a company, outside the realm of the chapter, are not acceptable for PAOE points or the Society Gold Ribbon Award. Histories for the Gold Ribbon Award shall be written by the Chapter Historian or a member of the Historical Committee from information obtained by interviewing a person knowledgeable of the history being written or from personal knowledge of the history of the system, person, event or company. Information obtained from electronic material is not acceptable.	
For each leadership recall interview – 50 points	
For program on history at monthly chapter meeting (limit of one) – 50 points	
For committee chair (incoming for spring CRCs) attending the committee CRC workshop – 25 points	
<u>REGIONAL HISTORIAN REPORTS:</u>	
For initial reporting by November 1 st (Regional Historian to assign) – 25 points	
For the first chapter in each region to reach PAR (points to be assigned by Regional Historian and will be based upon the Regional Historian reviewing points reported on the Society webpage) – 50 points	
ENTER TOTAL POINTS (THERE IS NO LIMIT TO THE MAXIMUM NUMBER OF POINTS EARNED.)	

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**PAOE 2003-2004
MEMBERSHIP PROMOTION SAMPLE REPORTING FORM
(MINIMUM = 200 POINTS, PAR = 500 POINTS)**

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MINIMUM POINTS	YEAR-TO-DATE										
If net area assigned members exceeds that of previous year – 100 points											
If committee size is 15 or 3% of chapter members (whichever is less) – 50 points											
For each upgrade from associate to member – 10 points											
For retention of each new member (dues paid second year) – 10 points											
For appointing telephone committee and conducting follow-up calls on delinquents and Society members not member of the chapter – 50 points											
For mentoring program (all new Society members assigned to chapter personally contacted within 60 days by letter or email with follow-up phone contact and offered mentoring) – 50 points											
<p>If net area assigned members exceeds that of previous year by * Percent – 100 points</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; border-bottom: 1px solid black;"><u># of Area Assigned Members</u></th> <th style="text-align: left; border-bottom: 1px solid black;"><u>* Percent</u></th> </tr> </thead> <tbody> <tr> <td>Level 1 = <100</td> <td>6%</td> </tr> <tr> <td>Level 2 = 100-249</td> <td>5.0% with a minimum of 6 members</td> </tr> <tr> <td>Level 3 = 250-499</td> <td>4.5% with a minimum of 12 members</td> </tr> <tr> <td>Level 4 = 500+</td> <td>4.0% with a minimum of 23 members</td> </tr> </tbody> </table>	<u># of Area Assigned Members</u>	<u>* Percent</u>	Level 1 = <100	6%	Level 2 = 100-249	5.0% with a minimum of 6 members	Level 3 = 250-499	4.5% with a minimum of 12 members	Level 4 = 500+	4.0% with a minimum of 23 members	
<u># of Area Assigned Members</u>	<u>* Percent</u>										
Level 1 = <100	6%										
Level 2 = 100-249	5.0% with a minimum of 6 members										
Level 3 = 250-499	4.5% with a minimum of 12 members										
Level 4 = 500+	4.0% with a minimum of 23 members										
For membership promotion night at chapter meeting (limit of one) – 25 points											
For each nomination for the honor of Fellow with the appropriate documentation in accordance with the procedures as directed in the Manual for Chapter Operations (MCO) – 20 points											
For each nomination for the Distinguished Service Award or Exceptional Service Award with the appropriate documentation in accordance with the procedures as directed in the MCO – 10 points											
For each nomination for any other Society awards with the appropriate documentation in accordance with the procedures as directed in the MCO – 15 points											
For recognizing each new member at a monthly meeting – 5 points											
For publishing roster of industry representatives in hardcopy or on chapter website – 25 points											
For each upgrade from student member within 2 years of graduation – 25 points											
For the committee chair (incoming for spring CRCs) attending the committee CRC workshop – 25 points											
For surveying employers to identify new employees that are recent (within two years) engineering undergraduates or technical school graduates – 25 points											

For each new “non-traditional HVAC&R” chapter member (e.g., business, management, medical or legal professionals, code officials, building owners, etc.) – 25 points	
For events where stay-at-home parents can participate with their children (e.g., tour of an ice cream plant) – 25 points	
For each new chapter member whose age is between 23-35 (not to be combined with upgrade from student member points) – 25 points	
<u>RVC REPORTS:</u>	
For initial reporting by November 1 st (RVC to assign) – 25 points	
For the first chapter in each region to reach PAR (points to be assigned by RVC and will be based upon the RVC reviewing points reported on the Society webpage) – 50 points	
For planning/goal setting with RVC (points assigned by RVC by October 1) – 50 points	
For achieving goals established in goal-setting session with RVC (points assigned by RVC by June 30) – 0 to 50 points	
ENTER TOTAL POINTS (THERE IS NO LIMIT TO THE MAXIMUM NUMBER OF POINTS EARNED)	

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**PAOE 2003-2004
RESOURCE PROMOTION
(MINIMUM = 150 POINTS, PAR = 400 POINTS)**

THE RESOURCE PROMOTION POINTS ARE ENTERED DIRECTLY FROM HEADQUARTERS.

RVC REPORTS: FOR THE FIRST CHAPTER IN EACH REGION TO REACH PAR. (POINTS TO BE AWARDED BASED ON THE HEADQUARTERS SUMMARY REPORT.) – 50 POINTS

RVC REPORTS: FOR PLANNING/GOAL SETTING SESSION WITH RVC (POINTS ASSIGNED BY RVC BY OCTOBER 1) – 50 POINTS

RVC REPORTS: FOR ACHIEVING OBJECTIVES ESTABLISHED IN PLANNING SESSION WITH RVC (POINTS ASSIGNED BY RVC BY JUNE 30) – 0 TO 50 POINTS

PLEASE SEE THE PAOE POINT SUMMARY REPORT ON THE WEBSITE FOR THE RESOURCE PROMOTION POINTS.

THE RESOURCE PROMOTION REPORT IS SENT TO THE CHAPTER RESOURCE PROMOTION CHAIR AT THE END OF EACH MONTH AND TO THE CHAPTER PRESIDENTS FOUR TIMES DURING THE CAMPAIGN (DECEMBER, MARCH, MAY, JULY).

**PAOE 2003-2004
STUDENT ACTIVITIES SAMPLE REPORTING FORM
(MINIMUM = 150 POINTS, PAR = 400 POINTS)**

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MINIMUM POINTS	YEAR-TO-DATE
$5\sqrt{SMG}$ where SMG = new student member $30\sqrt{D/M}$ for chapter investment in student activities D = Dollars contributed M = Area Assigned Members	
If net student membership exceeds that of previous year – 25 points	
For each engineering college undergraduate or tech school student placed in an ASHRAE related summer intern job or part-time job during school – 25 points	
For each active student branch where the faculty advisor is a chapter member – 50 points	
For each K-12 student activity in which one or more chapter BOG, chapter committee or chapter member participates (other than advisor) – 25 points	
For each post H.S. activity in which one or more chapter BOG, chapter committee or chapter member participates (other than advisor) – 25 points	
For each teach-in by members of chapter BOG, chapter committee or chapter member per class or to an organized student group – 25 points	
For each Students' Night at chapter meeting (limit of two) – 25 points	
For each chapter activity with student branch including meetings, technical programs and technical tours – 50 points	
For each student project funded – 25 points	
For each entry in the student design competition – 50 points	
For each scholarship to a tech or undergraduate engineering student – 50 points	
For each student member attending a chapter monthly meeting – 10 points	
For the committee chair (incoming for spring CRCs) attending the committee CRC workshop – 25 points	
For each National Engineering Week Activity – 25 points	
For sponsorship of Future Cities Competition (National Engineering Week Activity) – 50 points	

RVC REPORTS:

For initial reporting by November 1 st (RVC to assign) – 25 points	
For the first chapter in each region to reach PAR (points to be assigned by RVC and will be based upon the RVC reviewing points reported on the Society webpage) – 50 points	
For an individual planning/goal setting session with RVC (points assigned by RVC by October 1) – 50 points	
For achieving goals established in goal-setting session with RVC (points assigned by RVC by June 30) – 0 to 50 points	
ENTER TOTAL POINTS (THERE IS NO LIMIT TO THE MAXIMUM NUMBER OF POINTS EARNED.)	

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**PAOE 2003-2004
TEGA SAMPLE REPORTING FORM
(MINIMUM = 150 POINTS, PAR = 400 POINTS)**

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MINIMUM POINTS	YEAR-TO-DATE
For each Technology Award entry into chapter competition – 10 points	
For chapter Government Activities Award entry into regional competition – 50 points	
For hosting a Society satellite teleconference or industry related, non-commercial satellite teleconference as approved by the TEGA Committee on research or technical activities – 100 points	
For each presentation (minimum 15 minutes) by an ASHRAE Technical Committee (TC) or Technical Group (TG) member on status of TC or TG efforts (Research activities, Standards activities, Handbook activities, etc.) to the local chapter (one per meeting, limit 4 talks per year) – 25 points	
For each handbook chapter reviewed by a chapter member, review submitted through ASHRAE website and presentation (minimum 15 minutes) made to local chapter – 25 points	
For each chapter Technology Award entry into Regional competition – 25 points	
For each chapter Technology Award entry into Society competition – 50 points	
For each standard or guideline reviewed by a chapter appointed committee of at least three people and review submitted to cognizant group – 25 points	
For each Government Activities Chapter Program (limit of two) – 25 points	
For each article published in chapter newsletter or chapter website with a refrigeration, technical, energy or government activities emphasis – 25 points	
For each article published on business, management or legal education – 25 points	
For each contact (meeting) with government officials (all government levels including school boards) or business and professional groups on ASHRAE related subjects by a member of the chapter BOG or chapter committee member – 25 points	
For establishing and maintaining an ASHRAE library for technology transfer (includes display at chapter meetings and local access to materials such as handbooks, standards, technical papers, information on ASHRAE and information on ordering materials) – 100 points	
For TEGA Committee with a minimum of four members (Chair, Refrigeration member, Technology Transfer member and Government Activities member) – 50 points	
For the committee chair (incoming for spring CRCs) attending the committee CRC workshop – 25 points	
For each low temp or industrial refrigeration program, seminar or tour – 25 points	
For any chapter that submits an entry for the Milton Garland Award – 25 points	

RVC REPORTS:

For initial reporting by November 1 st (RVC to assign) – 25 points	
For the first chapter in each region to reach PAR (points to be assigned by RVC and will be based upon the RVC reviewing points reported on the Society webpage) – 50 points	
For an individual planning/goal setting session with RVC (points assigned by RVC by October 1) – 50 points	
For achieving goals established in goal-setting session with RVC (points assigned by RVC by June 30) – 0 to 50 points	
ENTER TOTAL POINTS (THERE IS NO LIMIT TO THE MAXIMUM NUMBER OF POINTS EARNED.)	

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