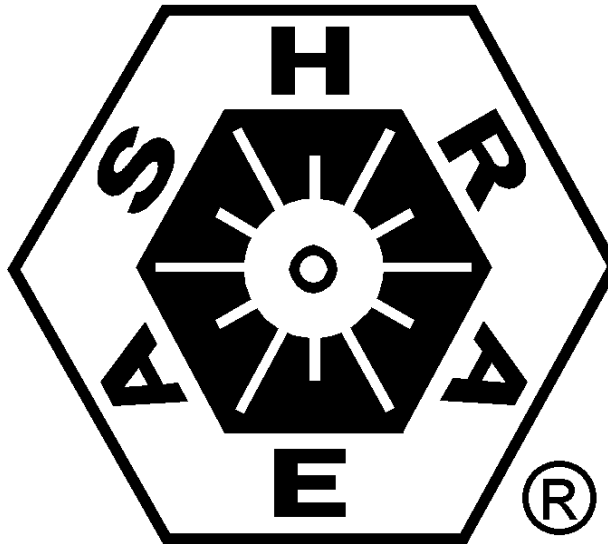


CRC MANUAL

(MANUAL FOR CONDUCTING CHAPTERS REGIONAL CONFERENCES)



*This Manual Is The Property Of The
AMERICAN SOCIETY OF HEATING, REFRIGERATING AND
AIR-CONDITIONING ENGINEERS, INC
1791 TULLIE CIRCLE, NE - ATLANTA, GA 30329*

*Completely Revised Manual – Approved by Members Council
June 27, 2006/06-27-06-64*

WHAT'S NEW IN THE CRC MANUAL

This CRC Manual has been completely revised in an effort to provide a more useful document for Regional and Chapter members to prepare for, and administer the Chapters Regional Conference. The primary objectives for this rewrite included the:

- elimination of unnecessary duplication;
- revision of outdated material;
- inclusion of examples from other regions;
- incorporation of planning tools to make more efficient use of volunteer time;
- provision of guidance rather than directives; and,
- improvement of the transition of CRC to the incoming host chapter.

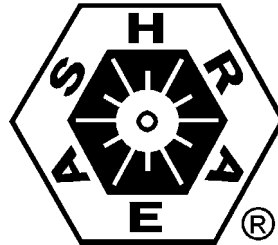
The organization of this document includes information groups. These groups are designed to provide easily obtainable information based on successful past conferences, and the ASHRAE Rules of the Board. The text is grouped to provide information on:

- Chapters Regional Conference Organization;
- Meetings and Programs;
- Accommodations and FUN; and,
- Administration and Documentation.

Sample forms and guidelines are provided in usable formats and are also grouped into functional categories. This information is designed to provide available tools, guidelines and prior examples that have helped others to administer successful events. Attachments to prior editions of this manual have been revised or eliminated as needed. In addition, new tools have been added which include:

- A flexible calendar of events for CRC administration and planning for the CRC Chairman;
- A revised Director and Regional Chairman calendar of events; and,
- A management check sheet for use by the CRC Chairman with subordinate check sheets for each functional activity assigned to CRC committee members.

It is the intent of the following document to comply with ASHRAE's Rules of the Board while recognizing the diversity that each region of this society offers its members and the CRC process. Each CRC is expected to incorporate the flavor of particular regional influences as well as individual dynamics of its members.



ASHRAE

Technology for a Better Environment

ASHRAE Mission Statement

To advance the arts and sciences of HVAC&R to serve humanity and promote a sustainable world.

ASHRAE's Core Values

Advancement - We are committed to the advancement of the arts and sciences of HVAC&R for the benefit of society through research, technology development and transfer, and education and training.

Leadership - We are committed to providing leadership within our industry, and developing leadership qualities in our members.

Integrity - We are committed to honesty in the practice of our profession as embodied in the ASHRAE Code of Ethics.

Service - We are committed to service to our members and to the public.

Excellence - We are committed to the achievement of technical quality and excellence in our programs, publications, courses and other activities.

ASHRAE Vision

ASHRAE will be the global leader, the foremost source of technical and educational information, and the primary provider of opportunity for professional growth in the arts and sciences of heating, ventilating, air conditioning and refrigerating.

ASHRAE Principal Strategic Directions

1. ASHRAE will lead the advancement of sustainable building design and operations.
2. ASHRAE will be a world-class provider of education and certification programs.
3. ASHRAE will position itself as a premier provider of HVAC&R expertise.
4. ASHRAE will be a global leader in the HVAC&R community.

Approved by the Board of Directors March 20, 2006

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INTRODUCTION

Chapters Regional Conference

Scope

The Chapters Regional Conference (CRC) is intended to provide a forum for the dissemination of information pertaining to chapter and regional activities.

Purpose

To provide a medium for:

- A. Chapters to report their activities for the previous year and establish goals for the coming year.
- B. Regional officers to report their activities and plans.
- C. Society officers to inform the region of Society plans, review chapter activities within the region and participate in workshops.
- D. Chapter delegates to submit motions for proper review.
- E. Chapter delegates to present nominees for Society and regional offices and candidates for honors and awards.
- F. Conducting chapter workshops that will educate and prepare officers and committee members to fulfill their responsibilities.
- G. Conducting technical sessions on subjects that will educate as well as increase attendance.
- H. Organizing social activities that will increase attendance and promote camaraderie.
- I. Recognizing and presenting awards to chapter and regional members.

General

The boundaries of the designated regional area served by the Chapters Regional Conference (CRC) are shown on the regional map, Appendix A.

Attendance at meetings of the CRC is expected of all Chapter Delegates and Alternates, Director & Regional Chair, Regional Historian, Regional Refrigeration Chair (optional), Regional Webmaster, Regional Vice Chairs for Membership Promotion, Student Activities,

Chapter Technology Transfer, Research Promotion, Regional Member, Alternate and Reserve Alternate to the Nominating Committee, Regional Program (optional) and chapter committee chairs of the above-mentioned committees. In addition, any Society member residing in the region is encouraged to attend these meetings. The attendance of chapter officers and committee chairs, although not mandatory, is strongly encouraged.

Each CRC is held once a year at least 30 days before the annual meeting of the Society for spring conferences. Those regions having fall conferences should schedule them prior to November 1 of each year. The time and place of each conference will be selected by the Director Regional Chair (DRC) and submitted to Members Council at least three years in advance of the selected date.

Bylaws and Rules of the Board

The information contained in this manual is in accordance with Society Bylaws and ROBS.

CHAPTERS REGIONAL CONFERENCE ORGANIZATION

Chapters Regional Conference

The term Chapters Regional Conference (“CRC”) defines a meeting of all the chapters of the region. The Chapters Regional Committee conducts the orientation session, caucus, executive session and business meetings. The conference also includes workshops, technical sessions, technical tours, addresses by Society officers, regional award presentations and offers opportunities for regional fellowship. (see ROB 600-130-001)

Chapters Regional Committee

The Chapters Regional Committee consists of the delegates and alternates of the chapters. The Director and Regional Chair shall be the chair of the committee. The Chapters Regional Committee participates in the orientation session, caucus, executive session and business meetings. (see ROB 520-116-001)

Director and Regional Chair

The Director and Regional Chair (“DRC”) is ultimately responsible for the CRC and should direct the host chapter in its planning efforts for the conference. The DRC should outline the rotational sequence for regional conferences to ensure that proper invitations are extended for the conference.

The DRC is specifically responsible for conducting the business meetings of the CRC.

- A. The DRC shall notify the Society-assigned presidential representative and vice president (the official representatives to the Chapters Regional Conference) of the time they are scheduled to address the meeting. It is customary that the presidential message be presented by the presidential representative at the presidential luncheon. The vice president will speak on current ASHRAE activities and should speak at a luncheon, if practical, or time should be provided for the vice president's message early in the first business session.
- B. The DRC shall prepare and issue the agenda.
- C. The DRC shall invite Society officers and distinguished guests such as past presidents of the Society in their region, to attend the conference. He shall also invite chapter committee chairs to special workshop sessions. DRC should also request that regional vice chairs invite chapter

committee chairs to their respective workshops.

- D. The DRC shall edit meeting minutes and forward approved minutes within 60 days to Headquarters for reproduction and distribution within 90 days to the DRC, chapter president, chapter secretary, regional vice chairs, Nominating Committee member and alternate, and chapter delegates and alternates.
- E. The DRC shall schedule required chapter workshops.

A review session should be held following the CRC in order to assess its effectiveness and to identify opportunities for improvement. The DRC, Society-assigned presidential representative and vice president shall attend. Others, such as the Chapters Regional Conference General Chair, next year's Chapters Regional Conference General Chair, the Assistant Regional Chair (ARC) and other Society officers in attendance, may be invited to attend. The review session should be an open forum between the Society officers and the regional representative(s). A written review of the CRC shall be prepared by the Society-assigned vice president, with counsel from the Society-assigned presidential representative.

Host Chapter

The host chapter, under the direction of the DRC, is responsible for planning and encouraging attendance at the CRC. It is the responsibility of the host chapter to provide physical facilities for the meeting which include:

- A. A hotel with suitable and reasonably-priced accommodations. The location of the hotel should be considered from the standpoint of easy access to the local airport and major facilities.
- B. Adequately sized meeting rooms for all meetings and functions.
- C. Audio and video equipment as required by the speakers. Equipment should be set-up and tested prior to the meeting to ensure that it works properly.
- D. A member of the host chapter must be available at each meeting and function for handling lights and to attend to any unforeseen problems.

General Chair

The chapter assigned as host chapter to the Chapters Regional Conference (CRC) shall appoint/elect a CRC General Chair who shall serve as the Chapters Regional

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Conference (CRC) coordinator and shall organize and direct the host chapter Conference Arrangements Committee as defined in this manual (see Conference Arrangements Committee in the next section). The CRC General Chair shall be responsible to the “Director and Regional Chair” (DRC).

The CRC General Chair should maintain an outline of the planning and activities of the conference, which should be given to the General Chair of next year’s conference. The General Chair should note carefully the timing suggested by the conference schedule.

The General Chair should appoint subcommittee chairs, delegate responsibilities, and prepare a committee duty roster for all scheduled events and committee functions during the actual course of the conference.

Copies of all materials pertaining to the meeting, especially the program brochure, should be sent to the Director of Member Services at Headquarters.

Within 30 days following the conference the General Chair shall submit a written report, including a financial report, of the conference activities to the DRC, the next CRC General Chair and the president of the next host chapter.

Conference Arrangements Committee

The host chapter shall form a Conference Arrangements Committee with subcommittees as may be required to handle details as outlined in this manual. This committee will be expected to confer frequently with the DRC.

The Conference Arrangements Committee is charged with planning, developing, and supervising all technical sessions, special events, sports, entertainment, and companions’ activities. Recommended members of the Conference Arrangements Committee under the direction of the General Chair include:

- Vice chair (one or more)
Responsible for general support of the Chairman. The Vice Chairman should be able and willing to assume the full duties of the Chairman in the event he cannot fulfill his duties.
- Honorary chair/chairs (if appointed)
A distinguished member of the chapter may be designated as an Honorary Chair. Once designated, notice should be made at appropriate functions to recognize the Honorary Chair.
- Secretary
A secretary should be provided to keep minutes of

the CRC business meetings. After the DRC edits and/or approves the draft, the secretary should type and forward the final minutes to the DRC who, in turn, is responsible for submitting the minutes to the Director of Member Services at Headquarters within 60 days of the conference. Staff will distribute the minutes to the DRC, chapter president, chapter secretary, regional vice chairs, Nominating Committee member and alternate, delegates and alternates within 90 days of the CRC. These minutes should include the names of regional award winners. It is mandatory that a tape recording of the session not be the only record of proceedings. The secretary shall take general notes of the meeting and shall not be expected to provide a verbatim transcript of the proceedings.

- Attendance Chair
Responsible for having a monitor at each business session and workshop of the CRC to ensure that the name, chapter affiliation and chapter position of each person present is recorded. The attendance sheets are to be turned over to the DRC at the end of the CRC. (See Appendix D, p. 11 for a recommended attendance report form.)
- Accommodations Chair
To enhance cooperation and coordination with the hotel staff, one person should be responsible for all contact with the hotel management.
- Hospitality Chair
Responsible for coordinating facilities and refreshments within hotel guidelines, Society rules, and scheduling constraints of the CRC. This chair is responsible for maintaining the hospitality budget within guidelines established by the General Chair.
- Finance / Treasurer
Responsible for preparing a preliminary budget as soon as the program of special events is established. Committee chairs should furnish the Finance Chair with an estimate of anticipated expenses in connection with each event for which they are responsible. At the conclusion of the CRC, a complete financial report shall be sent to the DRC for attachment to the CRC minutes.
- Reception and Registration Chair
Responsible for staffing registration area at host hotel. Should ensure all registrants and guests are welcomed and provided with orientation and any hospitality tokens in an organized manner.

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- **Publicity Chair**
Responsible for solicitation of CRC and event participation. Includes any printing, mailing, and development of promotional collateral.
- **Sponsorship Chair**
Responsible for solicitation of sponsorships from regional businesses and organizations to offset the cost of putting on the conference. This can include solicitation of in-kind gifts and loans of equipment to reduce the costs to the host chapter.
- **Webmaster**
Responsible for creating and maintaining a website for the CRC. This may include the development of web content in cooperation with the Publicity Chair. This may include the development of web based registration packages with society or the chapter's own financial organizations.

Additional suggested activities that may be delegated to a specific chair and/or subcommittee may include responsibilities for:

- Banquet
- Companions
- Decorations
- Entertainment
- Social
- Sports
- Technical
- Transportation

ASHRAE Headquarters Staff

Although the location of the CRC is designated by the DRC, ASHRAE Headquarters will officially advise the host chapter of its selection as the host for the regional conference.

A minimum of three months prior to the conference, Society will send the following information and supplies to the host chapter: (Please note that fall CRC information is not always available three months prior to the conference due to changes in the chapter officers at the beginning of the fiscal year.)

- A. Registration cards, identifications cards with clear plastic holders, one current Board of Directors roster and ribbons to be presented to distinguished guests, including all Society officers, committee chairs, regional chairs and vice chairs in attendance at the meeting.
- B. Biographical sketches and photos of Society assigned officers.

- C. A basic letter to the host chapter General Chair concerning supplies and information on Society officers, preparation of minutes and other pertinent information.
- D. Permanent meeting venue signs, chapter identification card holders and software and instructions for printing the inserts

Chapter CRC Committee

Each chapter's CRC Committee shall be responsible for the following:

- A. To solicit and develop motions and general discussion items to be submitted to the CRC.
- B. To encourage the general chapter membership to attend and participate at the CRC.
- C. The Chapter CRC Action Committee shall solicit from the chapters, sections and student branches within their respective regional areas, recommendations concerning the policies, procedures and operations of the Society, its chapters, sections and student branches. These recommendations will be reviewed and submitted to Members Council through their respective delegates.

Chapter Delegate

The delegate is the voting member of the CRC and is selected from the chapter's Board of Governors. The delegate shall be the chapter president, the president-elect, vice president or immediate past president. The delegate shall take office on July 1 and serve for a period of one year. The delegate shall be present at all committee meetings and participate in the deliberations. No individual is allowed to serve for more than two consecutive years in this position and not more than four consecutive years as a delegate or alternate. (see ROB 520-116-002) Society-approved transportation costs (only) are reimbursed in accordance with current Society policy.

Each chapter delegate is required to:

- A. Attend the orientation session, caucus, executive session and all business sessions.
- B. Prepare the chapter report.
- C. Present the chapter's motions and discussion items.
- D. Vote on behalf of the chapter.

Chapter Alternate

The alternate shall be present at all committee meetings and participate in the deliberations but shall not vote except in the absence of the chapter delegate. The alternate shall take

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office on July 1 and serve for a period of one year. The alternate must be a member of the chapter Board of Governors. No individual is allowed to serve for more than two consecutive years and not more than four consecutive years as a delegate or alternate. (see ROB 520-116-002) Society-approved transportation costs (only) are reimbursed in accordance with current Society policy.

Each chapter alternate is required to:

- A. Attend the orientation session, caucus, executive session and all business meetings.
- B. Assist the delegate and vote in the delegate's absence.
- C. Present the items of discussions submitted by the chapters and officers.

Directors-At-Large

Each Director-At-Large is encouraged to attend his/her CRC and the regional planning session. If requested by the DRC, the Directors-At-Large are encouraged to participate in the CRC as follows:

- Orientation Session
- Chapter Workshops
- Technical Programs
- Other as requested by the DRC

Protocol Regarding Society Representatives

It is customary to treat Society representatives and staff with special courtesy and attention. This includes the president, president-elect, treasurer, vice presidents, other regional chairs, directors, Society-assigned visiting officers and permanent staff members.

It is customary for these Society officers, staff and their companions to be met upon arrival and to be driven to their departing transportation. Similarly, special treatment in room allocation and seating at the business sessions and luncheons or banquets are courtesies usually extended. The DRC and Conference Arrangements Committee are responsible for making room reservations for the official visitors.

The Society-assigned officers and staff (who are the official visitors) will expect to pay normal registration fee.

Visitors to your CRC, who are there in an unofficial capacity, should always be recognized at social or business functions.

When planning the schedule for Society officers attending the CRC, time should be allotted for them to visit significant architectural and/or engineering and/or manufacturing firms

in the area to encourage local ASHRAE participation.

The Publicity Subcommittee should utilize the presence of the Society President, Society officers, the DRC and Headquarters staff. (see ROB Book 2, MOP for O&D, Paragraph 5.3.1) Society-approved transportation costs (only) are reimbursed in accordance with current Society policy.

Interviews arranged with the press, radio and television media should give priority where possible and practical

Companions should be encouraged to attend the awards functions, banquet, welcome parties and other scheduled CRC functions. Separate companions' activities should not conflict with the CRC events.

MEETINGS AND PROGRAMS

Business Meetings

The business meetings, held during the CRC, will be general meetings of the Society serving the designated region and shall consist of a chair, who is the Director and Regional Chair and one delegate and one alternate selected by each chapter in the region. The business meetings are the official meetings of the Chapters Regional Committee (see Chapters Regional Committee Rules). This committee receives and reviews:

- Reports on chapter operations
- Suggestions concerning Society policies and procedures
- Problems concerning chapter operations

CRC Workshops

Chapter workshops are specific periods set aside for the purpose of training incoming chapter committee chairs and officers, exchanging ideas between chapters on committee activities and discussing any problems a chapter may have. The respective regional vice chairs should be assigned subjects relating to their area of duty and expertise by the DRC. Chapter Operation Workshops shall not conflict with other required CRC events, workshops or technical programs.

The required workshops for all chapter committee chairs are:

- Chapter Operations Workshop for all officers and members of the Board of Governors
- Membership Promotion Workshop
- Student Activities Workshop
- Chapter Technology Transfer Workshop

The current chapter committee chairs and incoming chairs are expected to participate in the workshops.

In addition, the following workshops are recommended for consideration:

- Research Promotion Workshop
- Public relations
- Web Site Management
- Historical
- Chapter newsletter
- Student Branch Operation Workshop
- Honors and Awards
- Secretary
- Treasurer
- Preparation of CRC Motions (Action Items)

Orientation Session

Prior to the caucus, an orientation session may be held, open to all in attendance. All visiting officers to the CRC shall be invited to attend the orientation session prior to the caucus. At this session the DRC will inform the alternates and delegates of the positions to be filled and recommend that names of potential candidates be submitted for consideration. Questions pertaining to a candidate's eligibility or qualifications may be answered by anyone in attendance. The attendance of delegates and alternates is mandatory.

Caucus (Executive Session)

Only the chapter delegates and alternates and the regional Nominating Committee member, alternate and reserve alternate may attend the Caucus, which is held under Executive Session (limited attendance) (06-26-06-28). Any current Society Board member shall not attend a Regional Caucus or Executive Session held in any region (see Chapters Regional Committee Rules).

The Caucus of the CRC must be held when so instructed by the DRC. It is during this session that recommendations for future leaders of our Society are made. The regional delegates have a responsibility to seek out Society leaders within the region, to recommend technically competent specialists for Society committees and to recommend honors and awards for those who have contributed time, talent and energy to further the technology of our industry. ASHRAE business is *not* to be discussed in the Caucus.

The regional Nominating Committee member shall be chair of the CRC Caucus. The Society Nominating Committee alternate, along with the delegates and alternates from the chapters, shall be present at this meeting. The DRC may conduct an orientation session at the beginning of the Caucus, but must then leave the meeting and shall not attend the Executive Session, but shall be available to answer any questions on procedure.

The purposes of this meeting are:

- A. To elect a member and alternate to serve on the Society Nominating Committee.
- B. To make recommendations for appointments to Society Membership Promotion, Student Activities, Research Promotion and Chapter Technology Transfer Committees. (*Nominating Committee BAR: 91-06-23-01/01-01-28-01*)
- C. If a CRC-elected Member cannot attend either

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Society meeting of the Committee, the CRC-elected Alternate shall become the Member. If willing and able, the originally elected Member may then serve as the Alternate. If not, the CRC-elected "reserve" Alternate shall become the Alternate representing the region. (*Nominating Committee BAR: 91-06-23-01/01-01-28-01*)

- D. If neither the Member nor the Alternate elected by the CRC can serve, the CRC-elected "reserve" Alternate, shall become the Member representing the region. If no one elected by the CRC is able to serve, the DRC may appoint a Member to represent the region. (*Nominating Committee BAR: 91-06-23-01/01-01-28-01*)
- E. To make recommendations for Society elective offices, such as president-elect, treasurer, vice presidents and directors-at-large.
- F. To recommend nominees for DRC.
- G. To suggest appointments to Society committees.
- H. To recommend candidates to receive Society honors and awards.
- I. To select recipients of regional awards of merit.

Complete information on the candidates listed above, biographical forms, instructions to delegates and alternates and other pertinent information will be furnished by Headquarters several months prior to the CRC.

The election of the member and alternate from the region to serve on the Society Nominating Committee and the selection of the region's nominee for DRC shall be by majority vote at the Executive Session. The procedures for obtaining a majority vote shall be as outlined in the Manual of Procedures for the Society's Nominating Committee:

1. After the first ballot, if positions still remain to be filled, all candidates receiving less than a majority but at least two votes shall remain candidates.
2. After the second ballot, if positions still remain to be filled, all candidates receiving less than a majority but at least four votes shall remain candidates.
3. After the third ballot, if positions still remain to be filled, all candidates receiving less than a majority but at least six votes shall remain candidates.
4. After the fourth and succeeding ballots, if positions still remain to be filled, the committee, through a vote may call for the number of votes for each candidate to be reported.
5. In the event of a stalemate, the committee chairman may suggest an alternate voting method.

Recommendations for election to Society offices should not

be made public but should be forwarded, accompanied by biographical data, directly to the Society Executive Vice President at Headquarters by the regional Nominating Committee Member.

Other items may not be discussed in the Executive Session.

Guidelines for CRC Motions

Chapter members have the right and the responsibility to present to the chapter CRC Action Committee motions to enhance regional, chapter or Society activity. These motions will be presented by the delegate during the business session at the CRC where they can be discussed and voted on, following Robert's Rules of Order. Motions and resolutions coming out of the CRC can be most effective if presented in proper form.

A fine conceptual resolution can be lost in the legislative process at Society level for want of proper wording, background explanation or research. The purpose of this document is to furnish suggestions for proper development of motions and procedures to funnel the motion into the correct committees.

All CRC motions are brought to the Members Council by the DRC for action. Members Council will approve, disapprove, postpone, amend or refer these motions in accordance with the Rules of the Board.

- A. Committees and Councils to which Members Council refers a motion must report the disposition of the motion to Members Council.
- B. CRC motions affecting the Presidential Award of Excellence will be reviewed and discussed by the Members Council and recommendations forwarded to the President-Elect.
- C. The DRC has the responsibility of monitoring all CRC motions from his/her region and reporting at the next CRC the status of those motions.
- D. Status of Motions is maintained by society staff on the ASHRAE website.

Technical Programs

A major purpose of this Society is the dissemination of technical information for the benefit of all members and the general public. These programs provide the latest information in the fields of interest of Society, obtained through experience and research. A minimum of three hours at the regional conference must be devoted to programs of a technical nature.

The host chapter should send invitations to all Student Branches in the Region encouraging students and advisors to

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attend the technical sessions.
Types of Technical Programs

- A. **Technical Talks** - This is the most general type of program. Topics are selected and speakers assigned. Speakers may be local, or if feasible, a speaker of national repute may be invited to present a technical topic. The speaker should always be advised of the exact subject to be discussed, suggested points of interest to be covered and the time allotted for his/her presentation. The speaker's outline should be requested by the Technical Committee prior to the presentation in time to allow the Technical Committee time to review and to ensure that the contents of the requested information is covered and is in conformance with the program.

The Chapter Technology Transfer Committee is responsible for reviewing the contents of the technical session at the CRC and may provide a list of speakers that may be available and of interest.

- B. **Panel Programs or Forums** - The panel-type program offers an interesting medium for exchanging ideas. The purpose of the forum is to offer as much open discussion as possible and the subject matter selected is usually of a controversial nature. The panel members are usually selected from the region and should be experienced in the particular field being discussed. The selection of the moderator is extremely important. Keeping order during a forum or panel discussion can sometimes be difficult. The moderator should also be experienced in the field being discussed, but should remain neutral, simply guiding the discussion and maintaining control of the proceedings. A person who is well respected by all participating parties would be a logical choice for a moderator.
- C. **Technical Tours** - In order for a technical tour to qualify as part of the required three hour technical session, it must be approved by the DRC. Since a considerable amount of planning and time is required for a successful technical tour, it is not advisable to have more than one such trip per conference. Timing of the technical tour is very important and must be arranged not to conflict with other forums or technical sessions. The Transportation Subcommittee will make all arrangements for buses or other means of transportation.
- D. **Treatment of Speakers** - As with any invited

speaker, follow the guidelines described in the Manual of Chapter Operations regarding equipment, introduction techniques, commercialism requirements, and courtesy.

- E. **Equipment Expositions** - Chapters are encouraged to sponsor equipment expositions of products, equipment and systems subject to the Society's guidelines. (see ROB 600-120-001)

Host chapters should consider equipment expositions reflecting a single theme technical session such as "thermal storage" held in conjunction with the technical session.

A suggested time to hold an all-day technical session/equipment exposition is the day before the business and workshop sessions of the CRC so as not to interfere with these sessions.

ACCOMMODATIONS AND FUN

Headquarters Hotel

The headquarters hotel should be selected on the basis of adequate facilities, affordable guest rooms and appropriately-sized meeting rooms for technical and business sessions.

Complimentary rooms supplied by the hotel should be assigned to the CRC General Chair and DRC.

Meeting Rooms

Rooms should be air-conditioned, have good, easily controlled lighting that is compatible with visual aids, good acoustics or PA system and an acceptable fire safety system.

Designated seats should be provided at the head of the table for the DRC, meeting secretary and visiting dignitaries. The table should be large enough to allow delegates and alternates to be seated comfortably. The rooms should be large enough to accommodate visitors. Identification cards should be provided for persons seated at tables. Names should be large enough to be easily read by those in attendance. Recommended arrangements for the business sessions are provided as attachments to this manual.

Hospitality Room

A hospitality room should be provided for the use of companions while members are in meetings and as a meeting place during free periods.

Daycare/Babysitting Services

The host chapter should investigate the availability of daycare/baby-sitting services at or near the meeting facility and may elect to publish a list of such services containing the following disclaimer as recommended by legal counsel:

“ASHRAE makes no representations as to the quality or suitability of the childcare options available. ASHRAE has done no investigation or inquiry into these options and accordingly assumes no liability for these services. All participants considering these facilities should perform their own investigation into the quality, suitability or desirability of these childcare facilities”.

ASHRAE No Smoking Policy

No smoking is allowed in Technical Sessions, Plenary Session or Committee Meetings. (see Society Smoking Policy, Volume 1, Principles, Policies, and Position

Statements)

Social Functions

An important part of every conference is the opportunity to meet with other ASHRAE members, to exchange ideas and experiences and to make new friendships and renew old ones. The Social Subcommittee may be charged with planning all special functions in which members, their guests and companions participate. If a number of entertainment events are scheduled, it may be best to have a subcommittee formed for each special event. One of the visiting Society officers may be scheduled as the principal speaker at a major social event.

Note: A 15-20 minute time slot should be included during the CRC for the Vice President’s speech. The Vice President’s speech should also be at a well attended venue other than the Business Session, “if possible,” (i.e., Awards Luncheon or Banquet).

Schedules of sightseeing tours, church services in close proximity to the hotel and other interesting functions should be made available to attending guests. The Host Subcommittee is encouraged to be original and inventive in program planning.

The following suggestions are given only as a guideline.

President’s Luncheon and Banquet

The subcommittee’s responsibilities for these functions are:

- A. The selection of a master of ceremonies.
- B. The selection of a menu.
- C. The seating arrangement of the head table (if applicable). Place cards for the head table will be furnished by the host chapter.
- D. For the President’s Luncheon, the speaker is the presidential representative of the Society who will report on the activities of ASHRAE. If the Banquet is to include a speaker, he/she should preferably be a Society officer, someone prominent with the industry, or a person able to relate to our profession.
- E. To assess the total costs and ticket charges proposed, all of which will become a part of the general budget and subject to the General Chair’s approval.
- F. The printing of tickets.

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Awards Function

The Society and regional awards are presented at this function by the presidential representative and the DRC. Because of the length of the awards program it is suggested that there be no additional speaker at the awards function.

Companions' Activities

A separate subcommittee should be established with the responsibility of providing a suitable program for entertaining companions during the conference, particularly during the times when the members are attending technical sessions or meetings.

Suggested programs for the members' companions could include sightseeing tours, fishing trips, shopping trips, lectures, manufacturing plants. Activities should be offered that are unique to the area, if any exists (museum, art gallery or historical points of interest).

Charges for companions' functions, as all other activities, should be kept to a minimum to encourage participation and should be carefully planned so as not to interfere with attendance at the luncheons, banquets, etc.

Companions should be encouraged to attend the President's Luncheon, awards functions, banquet, welcome parties and similar CRC scheduled functions.

Check with prior CRC General Chair's reports to determine the average number of Companions that attend your CRC and allocate resources accordingly

Sports

Suggestions for sports activities include any locally popular sport such as fishing, golfing, skiing, etc. Comparisons in procedures apply to any option, however, golf will be highlighted as an example here. Regardless of the proposed sport, a designated chair should be appointed to coordinate the function.

Green fees and allowance for prizes should be included in the costs presented to the CRC General Chair for inclusion in the general budget and for determining golf ticket charges.

Arrangements may be made with one or more local clubs to accommodate visiting members who may wish to play golf on the days before or after the conference.

Employer Recognition (optional)

ASHRAE visiting officers host a recognition breakfast/lunch

at each CRC to acknowledge as many employers in the local area as possible for their support of the host chapter and its programs. These are employers that financially support their employees to be members/officers of the local chapter, support the chapter's research promotion program, etc. A second purpose is to invite employers that have not supported the chapter but whose support is desirable. At the event, the visiting officers make brief remarks about current ASHRAE activities and give the attendees an opportunity to suggest improvements/new activities to the officers that would be valuable to companies in the industry.

It is strongly encouraged that one or more of the following events be:

1. Employer Recognition Breakfast or Lunch (breakfast preferred) attended by:
 - a) Employers who sponsor an individual member in ASHRAE
 - b) Employers who contribute to Research
 - c) Employers who are potential sponsors and contributors
2. Invitation for employers to attend:
 - a) Business sessions
 - b) Technical seminar
 - c) Socials

Prior to scheduling the event the CRC Host Committee should:

1. Prepare a list of potential attendees and obtain a preliminary head count. Potential attendees are the principals or their designated representatives of the following:
 - a) Consulting engineering firms
 - b) Power companies
 - c) Mechanical contracting firms
 - d) Colleges and universities
 - e) Manufacturers
 - f) Building owners and managers
 - g) Hospitals
 - h) Government
2. Call or write the senior ASHRAE officer assigned to the CRC to:
 - a) Ask his/her preference for the type of event and format.
 - b) Obtain the budget amount per attendee.
3. At least one month prior to scheduled event and/or events the CRC chair should prepare and distribute invitations to all potential attendees.

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The invitation should include:

- a) Purpose of the invitation
- b) Attending senior ASHRAE officer's name and position
- c) Time, date and place of event and/or events

Designation of general responsibilities is as follows:

- a) The CRC Host Chapter shall complete items A, B and C listed above.
- b) Name badges shall be provided for each attendee.
- c) The DRC shall host the breakfast or luncheon meeting and make the introductions.
- d) The Senior Society officer in attendance shall make the recognition remarks.
- e) The CRC General Chair, the Host Chapter President, and the Membership Promotion and Research Promotion Regional Vice Chairs should also attend.
- f) The names, addresses, titles, companies and how they support ASHRAE of all employer attendees will be forwarded to the senior officer by the DRC for use in sending follow-up *Thank you* letters and in preparation of awards.

ASHRAE Regional and Chapter Alcohol Policy

ASHRAE Regions and Chapters when conducting Regional or Chapter meetings or other events that would warrant having alcohol on the premises shall adopt these policies.

If alcoholic beverages are to be sold or served at a Regional or Chapter meeting or other function on the Establishment's premises (or elsewhere under the Establishment's alcoholic beverage license), such beverages shall be dispensed only by the Establishment's employees and bartenders. The term "Establishment" shall mean the hotel, restaurant, club or other organization providing the meeting space to the ASHRAE Region or Chapter.

The Establishment represents and warrants that it carries adequate liquor and dram shop liability insurance to protect itself against claims arising from the Establishment's negligent activities where alcohol is served.

The Establishment agrees to comply with ASHRAE's request to discontinue all alcoholic service at any particular time during any of the ASHRAE Regional or Chapter events held at the Establishment.

- Service Requirements: The Establishment shall:
 - a) request proper identification (photo ID) of any person of questionable age and refuse alcoholic

beverage service if the person is either under age or proper identification cannot be produced;

b) refuse alcoholic beverage service to any person who, in the Establishment's judgment, appears intoxicated; and

c) instruct it's bartenders not to over pour.

- Training: The Establishment represents and warrants that all Establishment personnel have undergone adequate training to prevent any incidents which could result in claims for liquor liability.
- Indemnification: Notwithstanding any other provisions of this contract, the Establishment shall defend, indemnify and hold ASHRAE, the ASHRAE Region or Chapter, officers, directors, employees, agents and members harmless from and against any and all losses, damages, claims, expenses and liabilities of any kind, including costs of defense thereof, caused by or arising from the Establishment's sale or service of alcoholic beverages.

ADMINISTRATION AND DOCUMENTATION

Financial Overview

CRCs should be self-sustaining from a financial point of view. As high registration fees and function costs will prevent some members (especially local members) from attending, every effort should be made to keep expenses and costs to a minimum.

The host chapter shall use its tax exemption certificate when making payments to the hotel and others to take advantage of ASHRAE's nonprofit status.

It is customary to charge all attendees, including officers and visiting dignitaries of the Society, a registration fee which should cover most of the prorated expenses. Some regions, based on the number of members in good standing, make an assessment of all chapters within their region to cover general expenses and a portion of the gratuities.

A free room for the DRC and the CRC General Chair for the duration of the CRC should be built into the CRC budget.

Establish a separate checking account for the conference, with the Finance Committee Chair and CRC General Chair authorized to sign checks.

Hotel expenses and out-of-pocket expenses, including meal costs, other than those programmed in the budget, are the individual responsibility of the members, delegates and others attending.

Disposition of CRC Funds

It is not the intent of the CRC to be a fund raising event for chapters. In the event of a surplus or deficit, the following guidelines should be considered with the approval of the DRC.

Excess Funds (alternatives)

- Chapter to keep a portion
- Contribute to regional fund
- Support students to CRC
- Contribute to research promotion
- Return funds to Headquarters
- Return funds to contributors
- Contribute to regional scholarship fund

Deficit Funds (alternatives)

- Host chapter funds
- Special assessment of chapters
- CRC Fund
- Contributions from area sponsors

Some suggestions for ensuring adequate cash reserves are available to cover CRC costs include:

- A. Except for delegates and alternates who are expected to attend, the purchase of tickets for banquets and special events should be on a voluntary basis for all members and guests.
- B. Cocktail parties in connection with receptions and banquets should use separate cash bars and be self-supporting. However, some host chapters sponsor a welcome reception the night preceding the conference for out-of-town delegates and guests.
- C. Many manufacturers and utility companies and some large A&E firms have in-house printing facilities that may be utilized. It is possible the company may prefer to bill the conference, receive payment, and then donate that amount for tax reasons. In this way, printing, which is one of the larger conference expenses, can frequently be appreciably reduced or eliminated.
- D. Corporate sponsorship may be obtained within the guidelines of the Board Approved Rules.

It is often customary for hotels, in addition to donating meeting rooms, to also donate the "presidential suite," which can be used for the welcome reception, press conferences, and hospitality room for the companions. (NOTE: The visiting officers and staff are reimbursed by Society for their expenses at the CRC).

Budget

When preparing the conference budget the following costs should be considered:

- A. Meeting rooms, telephone calls, and other incidental expenses.
- B. The Reception Subcommittee's expenses, such as flowers, companions' favors, etc.
- C. Printing of programs, tickets, etc.
- D. The Entertainment Subcommittee's planned functions, including all gratuities, taxes, etc.
- E. Transportation for functions, technical tours, etc.
- F. Operation of the companions' registration and hospitality room.
- G. Stenographic services in recording meeting proceedings.
- H. Audio-visual equipment.
- I. Incidental costs, such as honorariums, special gifts, postage, etc.
- J. Complimentary tickets for functions.
- K. Coffee and soft drinks at meeting breaks.

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Caution: *When establishing the registration fee and the price for each event, care should be taken to predict “break-even” on realistic attendance forecasts.*

A sample host chapter Sample Budget is provided as an attachment to this manual showing preliminary figures. The final column should be completed following the CRC.

Providing best and worst case estimates for each conference cost category is an excellent technique for forecasting income and expenses.

Tax Exemption

In order to take advantage of ASHRAE’s tax exempt status, US chapters are urged to become part of the Group Exemption. This ensures tax-exempt status at the federal level.

Tax-exempt status at the local level is granted by the individual states. For further information, contact the Chapter Support Section at Society Headquarters.

Publicity in News Media

It is essential that the Publicity Chair make personal contact with all available news media in the area including:

- Newspapers - daily and weekly.
- Television and radio stations.
- Trade publications.
- Other media outside the local area, such as trade magazines, and particularly the *ASHRAE Journal* and *Insights*. The *ASHRAE Journal* and *Insights* editors should be contacted as soon as the program is finalized.
- Publications by the local Chamber of Commerce or other similar associations.

All public relations events should be scheduled so as not to conflict with CRC activities. The following steps should be taken to provide adequate media coverage:

- A. **Announcements** – Mail, or email, announcements with pertinent information concerning the conference to all media as soon as possible. If possible, include biographies and photographs, available through Headquarters, of attending Society officers, staff, and speakers
- B. **News Conference** - A news conference which includes representatives from newspapers, TV and radio produces the best results. The news media is usually interested in interviewing our Society

President if we emphasize the prospects and new developments in the energy and environmental fields within our industry.

- C. **Interviews** - A suitable time for interviews is prior to the welcome luncheon, or, alternatively, when they coincide with the Executive Session.
- D. **Special Invitations** - Consideration should be given to inviting a limited number of members of the press to the welcome luncheon and the technical sessions. Special guests should be met by a member of the Publicity Subcommittee and it is customary to seat such guests at a reserved table.
- E. **Photographs** - Make arrangements for photographs to be taken throughout the proceedings, some of which should be suitable for use in *ASHRAE Insights*. If the host chapter is unable to provide a competent photographer, the DRC should be notified so that other suggestions or arrangements can be made.
- F. **Follow-Up** - Keep a file of all press clippings. Following the conference, a copy should be sent to your DRC, the Regional Historian, and to Headquarters. Note any radio or television coverage.

Promotional Distributions

The official program and all promotional literature should be distributed to chapter officers, delegates and alternates, Headquarters, Society officers, and to all members in the region. The initial distribution should be in the form of an announcement and should be made at least three months prior to the conference for timely inclusion in chapter newsletters and websites. Pre-printed pressure-sensitive mailing labels are available upon request to chapters from Headquarters at no charge.

Copies of all materials pertaining to the meeting, especially the program brochure, should be sent to the Director of Member Services at Headquarters.

Promotional distributions should be made as email links to a designated CRC website, or as attachments to emails. Regional distributions may be made to chapter membership via each chapter’s email distribution and web structure.

If hard copy mailers are required, non-profit organization rates are available to American chapters of ASHRAE for mailings of over 200 identical pieces, including CRC mailings. Application for a permit must be made at your local post office.

Speaking Engagements

MANUAL FOR CONDUCTING CHAPTERS REGIONAL CONFERENCES

Speaking engagements by visiting officers to service organizations and similar groups are encouraged. Coordinate schedule 45 days prior to the CRC along with a request for a speaking engagement through Society Manager of Public Relations.

Welcoming Guests

If possible, each delegate, alternate and official Society visitor and companion should be greeted by a local chapter member and companion to make certain they are made to feel welcome and comfortable.

The Reception Subcommittee should include members who have attended Society meetings and regional conferences and who are acquainted with a broad range of Society members.

On site pre-packaged packets including tickets, name tags, programs and other handouts will expedite registration. Establish a process that will allow for a pleasant welcome to all guests, especially during periods when large numbers of arrivals are expected.

Registration

A registration desk should be located in an obvious location and identified with a large ASHRAE sign which is readily visible to members. Local convention bureaus will sometimes provide people to help with registration.

Each registered member is to provide name, chapter affiliation and position.

Name Badges

Prepare name tags, supplied by Headquarters, with large legible type for all registered members and their companions. Ribbons for delegates, alternates, chapter officers, hosts, Society officers, Regional Chairs and other distinguished guests are furnished by Headquarters and should be affixed to the name tags as applicable.

The registration form should request the name that each registered member and companion wishes to have on the name tag.

Pre-Registration

Pre-registration forms, sent out with one of the early mailings, will give the chapter some idea of how many people to expect and will also bring in some operating funds.

Headquarters staff will, at the CRC Committee's request, provide guidelines and forms necessary to allow credit card

payments. Staff will provide administrative support, provide periodic reports, and forward payments to the CRC Chairman.

Pre-registration forms should be drafted simply and clean so that a person who is not familiar with the form can fill it out satisfactorily without asking questions. Put details, function descriptions, and explanatory information elsewhere. Consider offering a reduced cost on each event for early registration.

Meeting Venue and Identification Signs

Prepare identification cards for business meetings, luncheons and other official functions.

Permanent meeting venue signs, chapter identification signs and software with instructions for printing the name inserts are provided by Headquarters to each Region.

Blank inserts for printing the names of attendees for business sessions and other official functions are provided by Headquarters.

Minutes

The minutes of the CRC shall be forwarded to the Director of Member Services at Headquarters in Atlanta within sixty days from the conclusion of the CRC. Headquarters will forward the final minutes to the delegates and alternates within ninety days of receipt.

Retention of Historical Documents

Each DRC shall give each Regional Historian copies (electronic when available, and hard copies) of the following items, within 120 days of each CRC:

- CRC minutes and motions
- CRC Summary Report
- Regional officers' names and positions
- Regional recipients of Society and regional awards
- Other important items such as photographs, articles, etc.
- CRC meeting history report including total attendance and attendance at each function for future CRCs to use for space planning and social functions food/ beverages guarantees.

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ASHRAE REGIONAL BOUNDARIES AND CHAPTER LOCATIONS

REGION I

001 BOSTON	BOSTON, MA
003 RHODE ISLAND	PROVIDENCE, RI
004 CONNECTICUT	HARTFORD, CT
006 LONG ISLAND	GARDEN CITY, NY
007 NEW JERSEY	NEWARK, NJ
008 NEW YORK	NEW YORK, NY
009 NORTHEAST	ALBANY, NY
010 CENTRAL NEW YORK	SYRACUSE, NY
011 ROCHESTER	ROCHESTER, NY
012 NIAGARA FRONTIER	BUFFALO, NY
111 CHAMPLAIN VALLEY	BURLINGTON, VT
118 MAINE	LEWISTON, ME
129 TWIN TIERS	OWEGO, NY
146 BI-STATE	WHITE PLAINS, NY
152 GRANITE STATE	MANCHESTER, NH

REGION II

013 QUEBEC, LA VILLE DE	QUEBEC, PQ
014 MONTREAL	MONTREAL, PQ
015 OTTAWA VALLEY	OTTAWA, ON
016 TORONTO	TORONTO, ON
037 HAMILTON	HAMILTON, ON
100 HALIFAX	HALIFAX, NS
116 LONDON	LONDON, ON
117 NB/PEI	MONCTON, NB
141 WINDSOR	WINDSOR, ON

REGION III

021 PHILADELPHIA	PHILADELPHIA, PA
022 CENTRAL PENNSYLVANIA	YORK, PA
023 JOHNSTOWN	JOHNSTOWN, PA
024 PITTSBURGH	PITTSBURGH, PA
025 BALTIMORE	BALTIMORE, MD
026 NATIONAL CAPITAL	WASHINGTON, DC
027 HAMPTON ROADS	NORFOLK, VA
028 RICHMOND	RICHMOND, VA
098 LEHIGH VALLEY	ALLENTOWN, PA
112 DELAWARE	WILMINGTON, DE
125 ROANOKE	ROANOKE, VA
134 ANTHRACITE	SCRANTON, PA

REGION IV

029 NORTH PIEDMONT	GREENSBORO, NC
030 SOUTHERN PIEDMONT	CHARLOTTE, NC
031 SOUTH CAROLINA	COLUMBIA, SC
032 ATLANTA	ATLANTA, GA
097 GREENVILLE	GREENVILLE, SC
106 TRIANGLE	RAL / DURHAM, NC
113 CHARLESTON	CHARLESTON, SC

REGION V

038 CLEVELAND	CLEVELAND, OH
039 COLUMBUS	COLUMBUS, OH
040 CINCINNATI	CINCINNATI, OH
041 DAYTON	DAYTON, OH
042 TOLEDO	TOLEDO, OH
043 CENTRAL INDIANA	INDIANAPOLIS, IN
044 EVANSVILLE	EVANSVILLE, IN
045 DETROIT	DETROIT, MI
047 WESTERN MICHIGAN	GRAND RAPIDS, MI
090 AKRON/CANTON	AKRON/CANTON, OH
103 NORTHERN INDIANA	ELKHART, IN
120 FORT WAYNE	FORT WAYNE, IN
121 EASTERN MICHIGAN	FLINT, MI

REGION VI

048 WISCONSIN	MILWAUKEE, WI
049 ILLINOIS	CHICAGO, IL
050 CENTRAL ILLINOIS	PEORIA, IL
051 IOWA	DES MOINES, IA
052 MINNESOTA	MINNEAPOLIS, MN
054 SAINT LOUIS	SAINT LOUIS, MO
095 MADISON	MADISON, WI
107 NE WISCONSIN	GREEN BAY, WI
115 LA CROSSE AREA	LA CROSSE, WI
119 ROCKFORD	ROCKFORD, IL
123 MISSISSIPPI VALLEY	DAVENPORT, IA
159 CEDAR VALLEY	CEDAR RAPIDS, IA

REGION VII

055 LOUISVILLE	LOUISVILLE, KY
056 MEMPHIS	MEMPHIS, TN
057 BIRMINGHAM	BIRMINGHAM, AL
058 MOBILE	MOBILE, AL
059 NEW ORLEANS	NEW ORLEANS, LA
060 BATON ROUGE	BATON ROUGE, LA
061 MISSISSIPPI	JACKSON, MS
088 NASHVILLE	NASHVILLE, TN
099 EAST TENNESSEE	KNOXVILLE, TN
114 TENNESSEE VALLEY	CHATTANOOGA, TN
128 BLUEGRASS	LEXINGTON, KY
130 NORTHWEST FLORIDA	PENSACOLA, FL
133 NORTH ALABAMA	HUNTSVILLE, AL

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REGION VIII

062 ARKANSAS	LITTLE ROCK, AR
063 SHREVEPORT	SHREVEPORT, LA
064 HOUSTON	HOUSTON, TX
065 ALAMO	SAN ANTONIO, TX
066 AUSTIN	AUSTIN, TX
067 DALLAS	DALLAS, TX
068 CENTRAL OKLAHOMA	OKLAHOMA CITY, OK
069 NORTHEASTERN OKLAHOMA	TULSA, OK
070 FORT WORTH	FORT WORTH, TX
071 WEST TEXAS	LUBBOCK, TX
091 EAST TEXAS	TYLER, TX
154 SOUTH TEXAS	CORPUS CHRISTI, TX
165 MEXICO CITY	MEXICO CITY, MEXICO
166 MONTERREY	MONTERREY, MEXICO
173 GUADALAJARA	GUADALAJARA, MEXICO

REGION IX

053 KANSAS CITY	KANSAS CITY, MO
072 EL PASO	EL PASO, TX
073 ROCKY MOUNTAIN	DENVER, CO
074 UTAH	SALT LAKE CITY, UT
075 NEBRASKA	OMAHA, NE
076 WICHITA	WICHITA, KS
077 NEW MEXICO	ALBUQUERQUE, NM
093 SOUTH DAKOTA	SIOUX FALLS, SD
127 BLACK HILLS AREA	RAPID CITY, SD
131 BIG SKY	BILLINGS, MT
135 IDAHO	BOISE, ID
148 PIKES PEAK	COLORADO SPRINGS, CO
150 OZARKS	SPRINGFIELD, KS

REGION X

081 SACRAMENTO VALLEY	SACRAMENTO, CA
082 GOLDEN GATE	SAN FRANCISCO, CA
083 SAN JOAQUIN	FRESNO, CA
084 SOUTHERN CALIFORNIA	LOS ANGELES, CA
085 SAN DIEGO	SAN DIEGO, CA
086 CENTRAL ARIZONA	PHOENIX, AZ
087 TUCSON	TUCSON, AZ
092 SOUTHERN NEVADA	LAS VEGAS, NV
101 SAN JOSE	SAN JOSE, CA
105 ORANGE EMPIRE	ANAHEIM, CA
108 HAWAII	HONOLULU, HI
126 NORTHERN NEVADA	RENO, NV
144 SIERRA DELTA	SIERRA DELTA, CA
155 TRI COUNTY	REDLANDS, CA

REGION XI

017 MANITOBA	WINNIPEG, MB
018 SOUTHERN ALBERTA	CALGARY, AB
019 NORTHERN ALBERTA	EDMONTON, AB
020 BRITISH COLUMBIA	VANCOUVER, BC
078 INLAND EMPIRE	SPOKANE, WA
079 PUGET SOUND	SEATTLE, WA
080 OREGON	PORTLAND, OR
096 REGINA	REGINA, SK
102 SASKATOON	SASKATOON, SK
122 ALASKA	ANCHORAGE, AK
136 MID-COLUMBIA	RICHLAND, WA
145 VANCOUVER ISLAND	VICTORIA, BC

REGION XII

034 JACKSONVILLE	JACKSONVILLE, FL
035 FLORIDA WEST COAST	TAMPA, FL
036 MIAMI	MIAMI, FL
094 CENTRAL FLORIDA	ORLANDO, FL
104 GOLD COAST	FORT LAUDERDALE, FL
109 SPACECOAST	COCOA BEACH, FL
110 PUERTO RICO	SAN JUAN, PR
132 GULFSTREAM	WEST PALM BEACH, FL
139 SOUTHWEST FLORIDA	FORT MEYERS, FL
172 BRASIL	SAO PAULO, BR
178 ARGENTINA	BUENOS AIRES
CENTRAL AMERICA, SOUTH AMERICA	

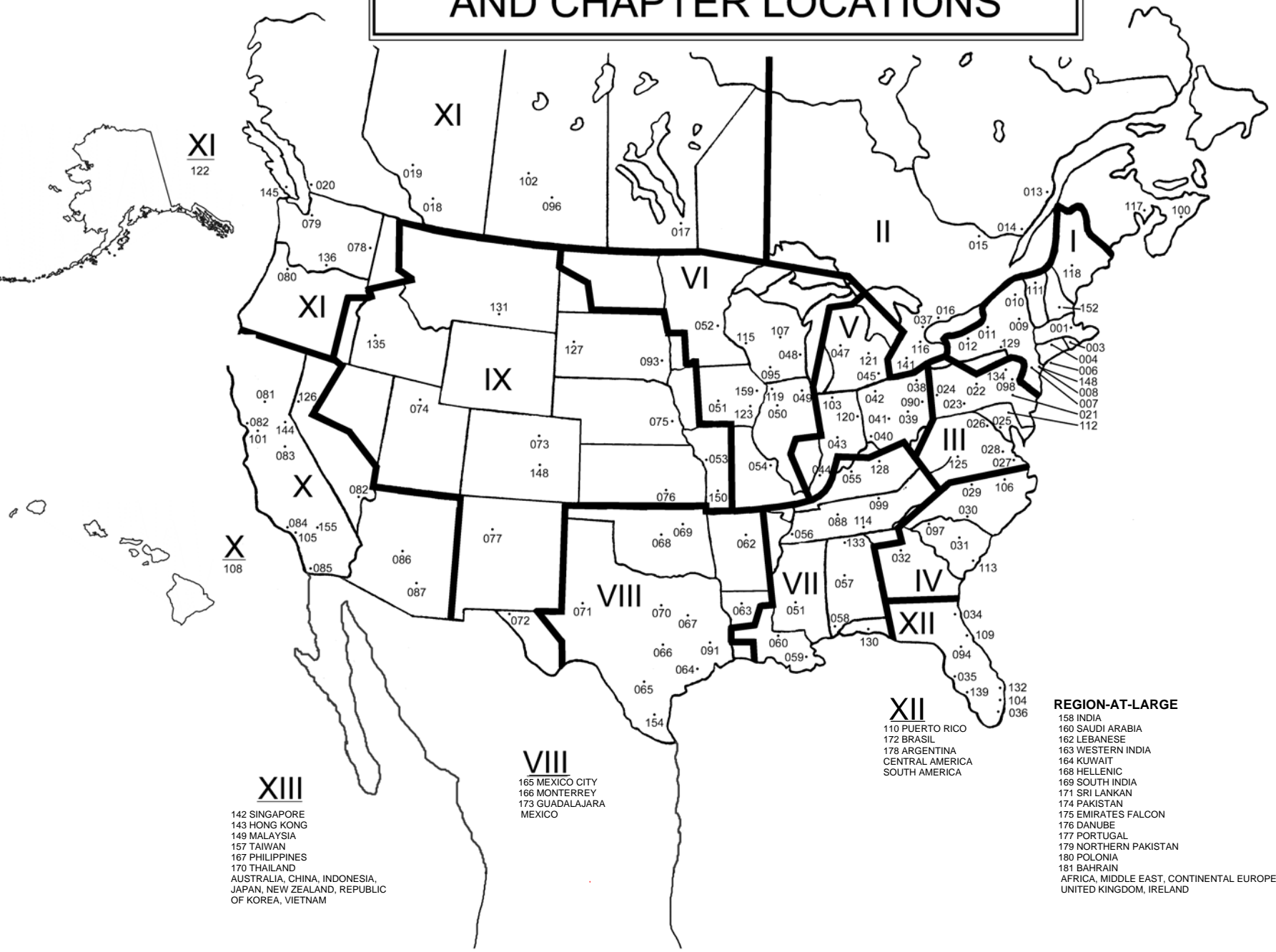
REGION XIII

142 SINGAPORE	SINGAPORE
143 HONG KONG	HONG KONG
149 MALAYSIA	KUALA LUMPUR
157 TAIWAN	TAIPEI
167 PHILIPPINES	MANILA
170 THAILAND	BANGKOK
AUSTRALIA, CHINA, INDONESIA, JAPAN, NEW ZEALAND, REPUBLIC OF KOREA, VIETNAM	

REGION-AT-LARGE

158 INDIA	NEW DELHI
160 SAUDI ARABIA	DHAHRAN
161 CAIRO	CAIRO
162 LEBANESE	BEIRUT
163 WESTERN INDIA	AHMEDABAD
164 KUWAIT	KUWAIT CITY
168 HELLENIC	ATHENS
169 SOUTH INDIA	BANGALORE
171 SRI LANKAN	COLOMBO
174 PAKISTAN	KARACHI
175 EMIRATES FALCON	DUBAI
176 DANUBE	ROMANIA
177 PORTUGAL	LISBON
179 NORTHERN PAKISTAN	ISLAMABAD
180 POLONIA	WARSZAWA
181 BAHRAIN	MANAMA
AFRICA, MIDDLE EAST, WESTERN ASIA, CONTINENTAL EUROPE, UNITED KINGDOM, IRELAND	

ASHRAE REGIONAL BOUNDARIES AND CHAPTER LOCATIONS



- XIII**
- 142 SINGAPORE
 - 143 HONG KONG
 - 149 MALAYSIA
 - 157 TAIWAN
 - 167 PHILIPPINES
 - 170 THAILAND
 - AUSTRALIA, CHINA, INDONESIA,
 - JAPAN, NEW ZEALAND, REPUBLIC
 - OF KOREA, VIETNAM

- VIII**
- 165 MEXICO CITY
 - 166 MONTERREY
 - 173 GUADALAJARA
 - MEXICO

- XII**
- 110 PUERTO RICO
 - 172 BRASIL
 - 178 ARGENTINA
 - CENTRAL AMERICA
 - SOUTH AMERICA

- REGION-AT-LARGE**
- 158 INDIA
 - 160 SAUDI ARABIA
 - 162 LEBANESE
 - 163 WESTERN INDIA
 - 164 KUWAIT
 - 168 HELLENIC
 - 169 SOUTH INDIA
 - 171 SRI LANKAN
 - 174 PAKISTAN
 - 175 EMIRATES FALCON
 - 176 DANUBE
 - 177 PORTUGAL
 - 179 NORTHERN PAKISTAN
 - 180 POLONIA
 - 181 BAHRAIN
 - AFRICA, MIDDLE EAST, CONTINENTAL EUROPE
 - UNITED KINGDOM, IRELAND

TYPICAL CRC AGENDA – 1

Thursday

8:00 AM to 5:00 PM Golf
6:00 PM to 10:00 PM Welcome Party
10:00 PM to ??? Hospitality suite open

Friday

6:45 AM to 7:50 AM Caucus
8:00 AM to 11:45 AM First business meeting
12:00 PM to 1:30 PM President's Luncheon
1:45 PM to 4:45 PM Technical Sessions
6:00 PM to 10:00 PM Banquet
10:00 PM to ??? Hospitality suite open

Saturday

6:45 AM to 7:50 AM Caucus
8:00 AM to 9:00 AM Business meeting
9:10 AM to 11:45 AM Workshops
12:00 AM to 1:45 PM Awards Luncheon
1:45 PM to 3:00 PM Second business meeting
3:00 PM to 4:00 PM Executive Session
5:00 PM to 8:00 PM Social
8:30 PM to ??? Hospitality suite open

TYPICAL CRC AGENDA – 2

Thursday

7:30 AM to 11:00 PMHospitality
10:00 AM to 4:00 PM Sports
10:00 AM to 6:00 PM Technical Session
7:30 PM to 10:00 PM..... Caucus

Friday

7:30 AM to 6:00 PMHospitality
7:45 AM to 11:45 AM..... First business meeting
12:00 PM to 2:00 PM.....President's Luncheon
2:00 PM to 6:00 PM.....Second business meeting
7:00 PM to 10:00 PM..... Welcome Reception
10:00 PM to 11:00 PM..... Hospitality suite open

Saturday

7:30 AM to 8:15 AM..... Caucus, if necessary, with breakfast
8:15 AM to Noon..... Chapter Operations Workshop
8:15 AM to Noon..... Research Promotion Workshop
8:15 AM to Noon..... Student Chapter Workshop
12:00 PM to 2:00 PMAwards Luncheon
2:15 PM to 6:00 PM..... Regional Workshops
6:00 PM to 10:00 PM..... Banquet

TYPICAL CRC AGENDA – 3

Thursday

8:00 AM to 5:00 PM Golf
8:00 AM to 5:00 PM Technical Session(s); at least four hours long
6:00 PM to 10:00 PM Welcome Party (Can be a simple get together or a full meal can be part of the evening.)
10:00 PM to ??? Hospitality suite open

Friday

8:00 AM to 9:30 AM Caucus with continental breakfast
9:45 AM to 11:45 AM First business meeting
12:00 to 4:00 PM Chapter Operations Workshop with lunch.
(Spouses need not attend and thereby have a full day for their activities.)
4:00 PM to 6:00 PM Hospitality suite open
6:00 PM to 10:00 PM President's Dinner
(Following the dinner there could be dancing, comedian, casino night or whatever may suit the region.)
10:00 PM to ??? Hospitality suite open

Saturday

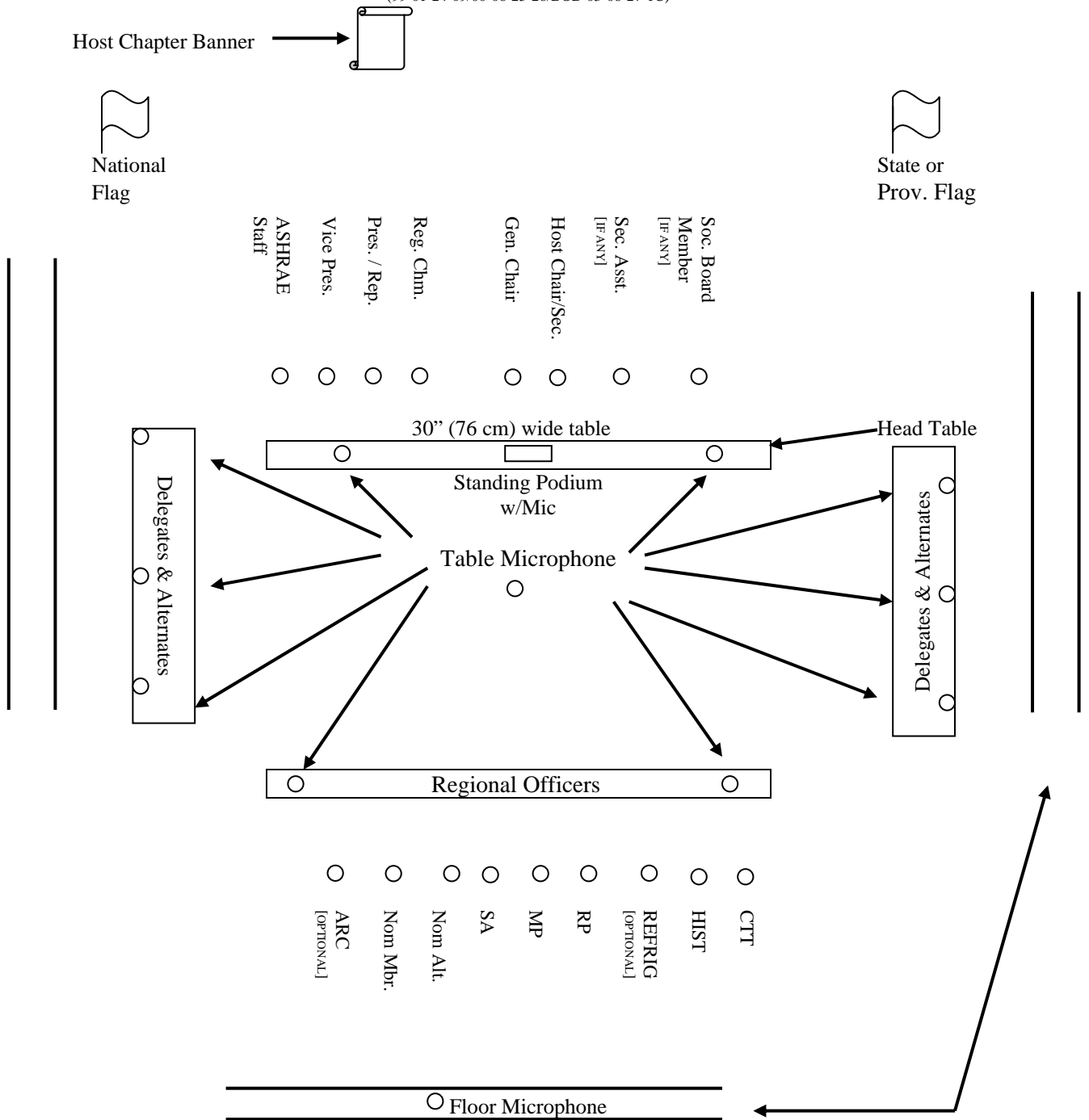
7:00 AM to Finish Executive Session with continental breakfast
7:45 to 11:45 AM Six Workshops with continental breakfasts
12:00 PM to 2:30 PM Awards Luncheon (No conflict with spouses activities)
2:45 PM to Finish Second business meeting
2:45 PM to ??? Hospitality suite open

NOTE:

- These are typical formats with the final agenda set by the Regional Chair.
- Golf/tennis should not conflict with any sessions.
- Concurrent technical sessions and workshops should not be scheduled.
- Presentations by the Vice President and staff representative should be given at the general business session. The Presidential Representative speaks at the President's Luncheon.
- Time is valuable. All comments need to be brief and to the point. Stay on schedule.
- Spouse activities shall not conflict with President's Luncheon or Awards Presentation.

CRC BUSINESS MEETING LAYOUT
(Typical Room Layout for Business Sessions)

(99-01-24-09/00-06-25-26/BOD 03-06-27-1C)

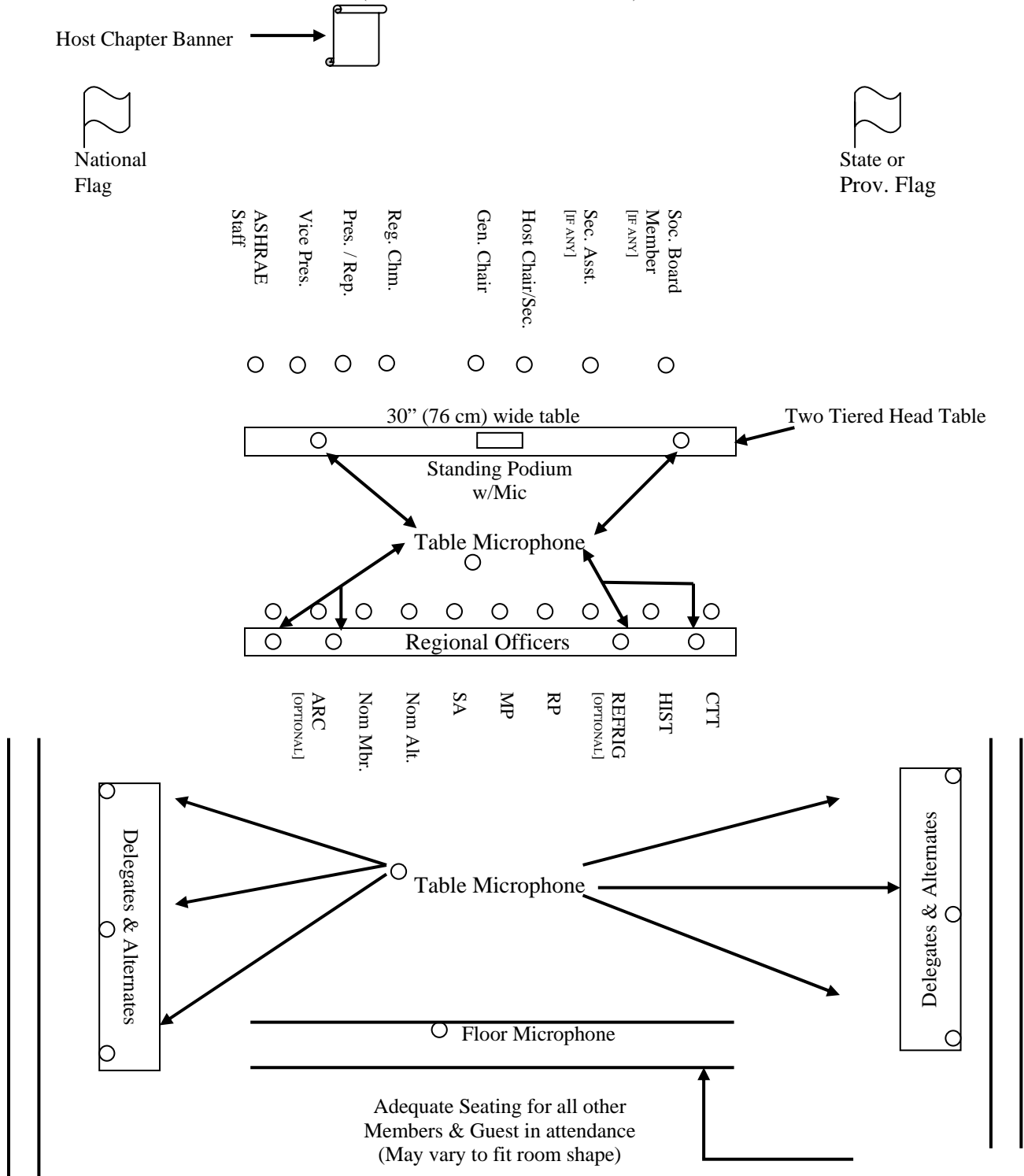


Adequate Seating for all other
 Members & Guest in attendance
 (May vary to fit room shape)

Note: Society Officers who are not official visitors should
 be seated in a place of prominence and recognized.

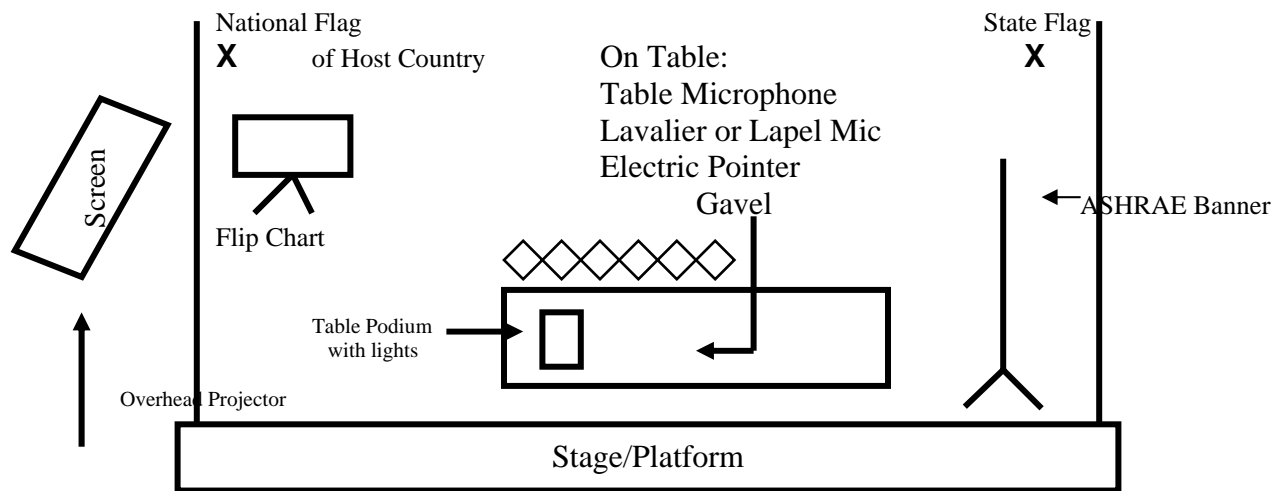
CRC MEETING LAYOUT
(Alternate Typical Room Layout for Business Sessions)

(99-01-24-09/00-06-25-26/BOD 03-06-27-1C)



Note: Society Officers who are not official visitors should be seated in a place of prominence and recognized.

Platform Arrangement Typical Layout for Technical Sessions and Symposiums



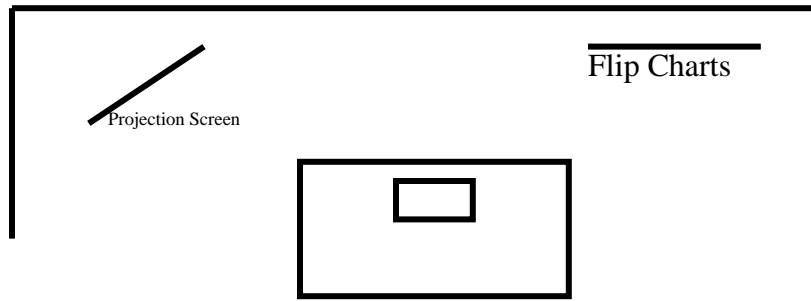
Screen size should be as large as room allows and placed so audience and head table can see

Head Table: Minimum 12 ft. long (3.7 m)
4 to 6 chairs at head table
Stage or platform: 12" high (30cm)

See Manual for suggested screen sizes

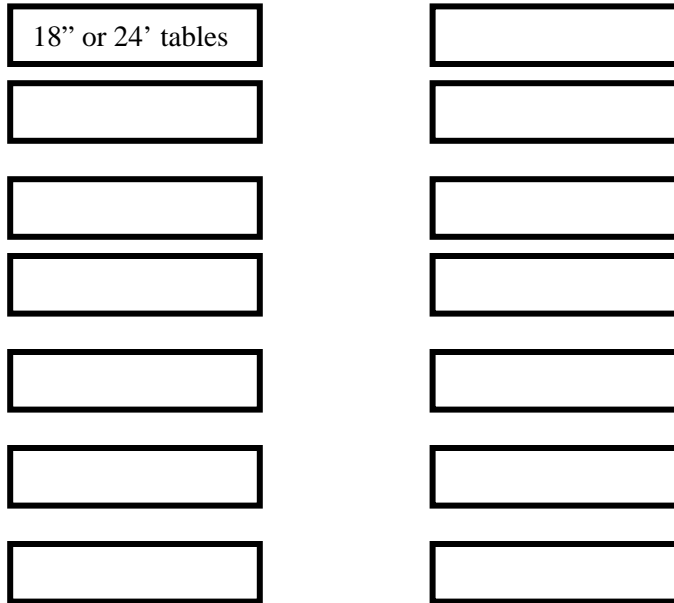
Hotel should supply all equipment for Technical Sessions except ASHRAE Banner and Gavel

**Typical Room Layout for Chapter Operations Workshops
and Technical Seminars**

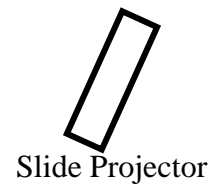


Speaker's table with table podium,
light, microphone and space for
materials and overhead projector.

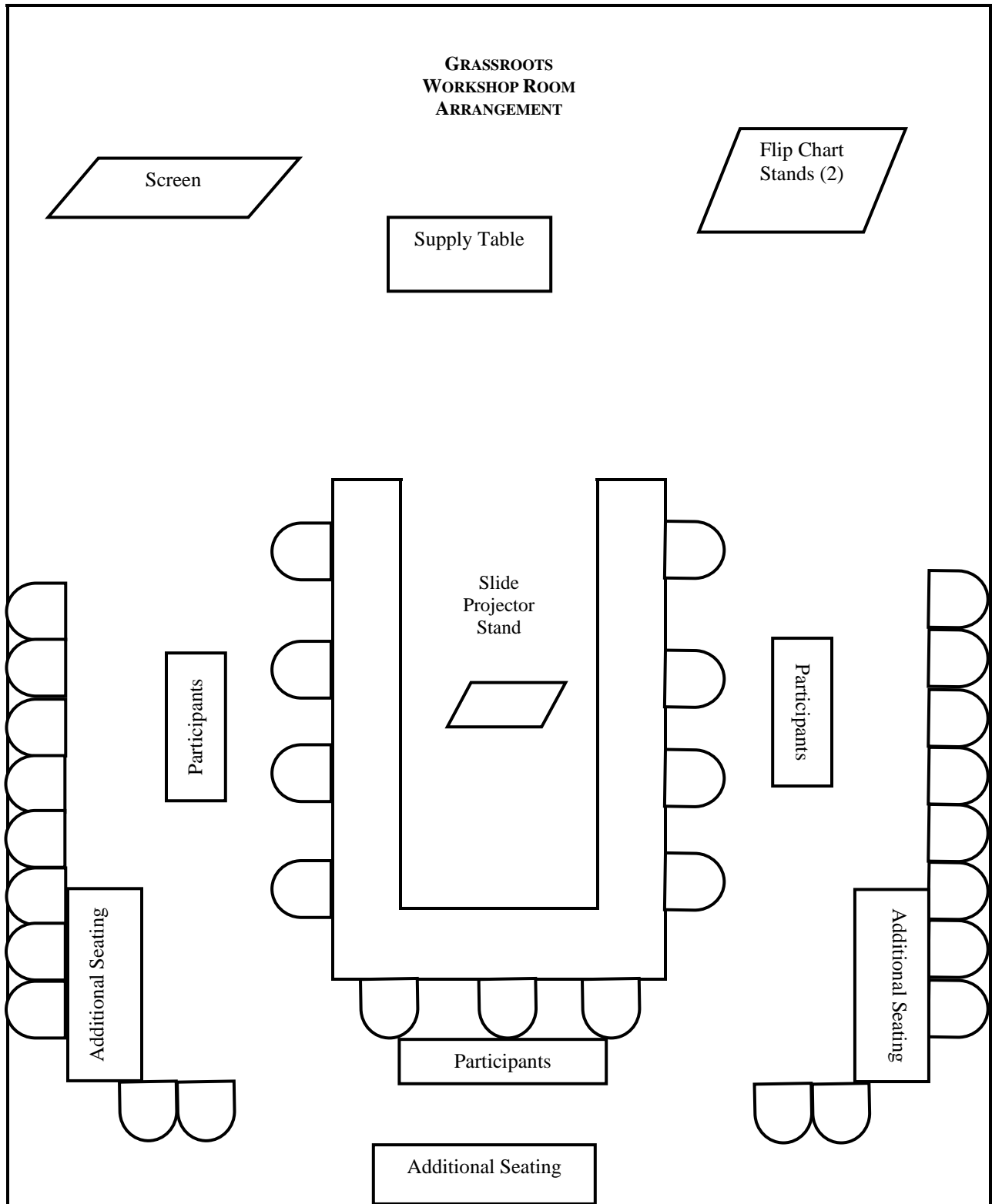
Reserve front seat
for participants
and visiting officers



Entrance



Slide Projector



MANUAL FOR CONDUCTING CHAPTERS REGIONAL CONFERENCES

HOTEL NEGOTIATING

In negotiating a contract with a hotel, the following basic rules apply:

1. EVERYTHING IS NEGOTIABLE.
2. AFTER AGREEMENT, GET IT IN WRITING.

You, the prospective customer, have the upper hand when it comes to negotiating with a hotel salesperson. There is more than one hotel with proper facilities to house a CRC and a good salesperson realizes this fact. There should be no "Take it or Leave it" attitude on the salesperson's part if he knows his business and wants yours.

The CRC meets when a hotel needs business - the end of the week. Most hotels are busy Sunday to Wednesday and need to have a group in to keep the occupancy rate up. In order to get this business, they are more apt to "make deals" - give special rates, waive meeting rentals, give more complimentary accommodations. On your initial contact, let the salesperson know that *you* know your business is valuable and let him make his best deal. Always obtain more than one bid - see what the competition has to offer, but don't try to use that information as a club - a subtle hint that you are reviewing several proposals should do.

Sleeping room rates can and should be guaranteed at least one year in advance. It is not too much to ask that this year's regular rates be confirmed as next year's convention rates, and you may even get a better quote than that. Food prices should be guaranteed six months in advance. Do not accept a 90-day quote. Complimentary rooms are usually given at a ratio of one free for every 50 rooms actually used. Ask for a suite over and above complimentary units. All the salesperson can do is say no, and you might be pleasantly surprised. Free meeting space is usual, but don't be surprised if a rental is asked. Meeting room rental should be a priority in your negotiation and rental should be waived especially if your program includes planned food functions.

Know profit margins for hotel business

- Rooms: 60% - 70%
- Beverage: 35% - 40%
- Food: 15% - 25%

When you feel you have the best and are satisfied, GET IT IN WRITING, signed by both parties. This is your security blanket and is as legal as you can expect. Even if the salesperson leaves the hotel, you have a written guarantee from the hotel that they will provide the services outlined.

Keep in touch with the hotel periodically just to make sure that nothing unexpected has happened, such as a major remodeling during the dates of your meeting. If plans change on either side, ask for a rewriting of the agreement. Don't give up anything unless you receive a fair exchange. If both parties have been honest and have come to an agreement, the meeting should run smoothly.

**ASHRAE
REGIONAL CHAIR'S (DRCs) CALENDAR OF EVENTS FOR CRC**

	<u>DATE</u>	<u>ITEM</u>
1.	2 years prior _____	Visit site and meet with Committee, determine hotel requirements.
2.	May 1 _____	Request completed Chapter Information Questionnaire.
3.	August 1 _____	Develop Regional Roster.
4.	August 1 _____	Write Chapter past-residents congratulatory letter.
5.	August 1 _____	Write new Chapter presidents instructional letter and encourage to attend CRC.
6.	August 1 _____	Write each Vice Chair regarding Chapter Visits. Set up meeting at CRC to discuss.
7.	August 15 _____	Write newsletter and send to usual recipients. Include Regional Roster or send out separately.
8.	180 days prior _____	Communicate with General Chair regarding protocol and room setups.
9.	180 days prior _____	Send Business Meeting Room Layout to General Chair.
10.	60 days prior _____	Write Delegate and Alternate regarding their duties at Business Meeting. Include Agenda for Business Meeting, Awards, President's Luncheon, Chapter Operations Workshop and supply information pertinent to selection of officers, committee members and awards.
11.	60 days prior _____	Ensure Committee Chairs are contacted regarding their obligation to attend workshop.
12.	60 days prior _____	Write Vice Chairs regarding their workshops. Ask them for Agenda. Also have them send to Committee Chairs.
13.	60 days prior _____	Write agenda and instructions for Caucus Orientation – send to Delegate and Alternate and others.
14.	60 days prior _____	Write each Vice Chair and request that they forward workshop requirements to General Chair with copy to DRC.

**ASHRAE
REGIONAL CHAIR'S (DRCs) CALENDAR OF EVENTS FOR CRC (CONT'D)**

	<u>DATE</u>	<u>ITEM</u>
15.	60 days prior _____	Write General Chair regarding Business Meeting Secretary and Recording Secretary.
16.	60 days prior _____	Send Chapter Operation Workshop layout to General Chair. (Find out first what audiovisual aids the presenters need.)
17.	60 days prior _____	Write Delegate and Alternate regarding importance of action items and motions and make suggestions. Include PAOE.
18.	60 days prior _____	Write invitation letter to: Society Officers _____ Regional Dignitaries _____ Chapter Officers _____ Chapter Committee Chairs _____ Regional Dinner Attendees _____ Former Regional Officers _____ DALs and DRCs _____
19.	60 days prior _____	Write letter to General Chair regarding accommodations, pick-up, etc., for official visitors. Copy to Regional Officers and visitors, including DRCs from other Regions.
20.	30 days prior _____	Develop Agenda for Business Meeting. Forward to the Delegate/Alternate and Regional Team.
21.	30 days prior _____	Write Regional Chair's Report to Business Meeting.
22.	30 days prior _____	Develop Agenda for Awards Luncheon.
23.	30 days prior _____	Develop Agenda and Outline for Chapter Operations Workshop.
24.	30 days prior _____	Analyze PAOE for coming year and write report to Business Meeting.
25.	30 days prior _____	Send Vice Chairs attendance forms and remind to record attendees.
26.	30 days prior _____	Develop report on last year's motions for Business Meeting.
27.	30 days prior _____	Make sure all Regional Awards, Membership Promotion, Research Promotion, PAOE and Regional Awards of Merit are prepared and on hand. Write each person responsible, including Headquarters.

**ASHRAE
REGIONAL CHAIR'S (DRCs) CALENDAR OF EVENTS FOR CRC (CONT'D)**

	<u>DATE</u>	<u>ITEM</u>
28.	30 days prior_____	Work up DRC portion of Chapter Operations Workshop, if any.
29.	30 days prior_____	Send Caucus Worksheet and Summary Report Form with instructions to Delegate and Alternate.
30.	30 days prior_____	Send CRC check sheet to Delegate and Alternate.
31.	30 days prior_____	Write Delegate and Alternate and presidents regarding Chapter Reports.
32.	30 days prior_____	Write Visiting Officers and staff offering assistance, etc.
33.	30 days prior_____	Consider holding a Regional Planning session immediately after the CRC. If you intend to have the planning session, inform regional team and Chapter Presidents.
34.	14 days prior_____	Determine President's Luncheon head table, Awards Presentation head table, and send to General Chair.
35.	1 week prior_____	Forward to Business Meeting recording secretary instructions of what to record, including "for," "against," "abstain" regarding motions at Business Meeting.

MANUAL FOR CONDUCTING CHAPTERS REGIONAL CONFERENCES

CRC REGIONAL CONFERENCE CALENDAR OF EVENTS

Reg Chm	48 months	Host Chapter and meeting date selected by Director and Regional Chair, considering normal rotation based on adequate room facilities and available dates for the specific days of the meeting.
Reg Chm	36 months	Coordination of dates with other regions. Approval of the Host chapter as submitted by the Director and Regional Chair, giving evaluation of dates of this regional request as well as the other regional requests.
Chapter	24-36 months	First meeting of chapter's Board of Governors to appoint committees, General Chair and preliminary discussion on conference format.
Chapter	24-36 months	Host Chapter and Director and Regional Chair select meeting hotel.
Gen Chm	18-24 months	Appointment of committees with ratification by Host Committee.
Hdqrs	12-36 months	Distribution of <i>Manual for Conducting Chapters Regional Conference</i> to the Host Chapter, as soon as identified.
Chapter	6 months	Request mailing labels, if desired.
Chapter	6 months	*Meeting of Conference Arrangements Committee and Director and Regional Chair to finalize programs. Monthly meetings thereafter to discuss progress.
Chapter	6 months	Begin meeting of all subcommittees. Chair to call meetings monthly thereafter and just prior to the Conference Arrangements Committee meeting.
Chapter	4 months	First mailing of meeting notice.
Reg Chm	3 months	Notify Presidential Representative and Vice President of when they will address the meeting.
Hdqrs	3 months	Distribution of supplies, such as registration cards, ribbons, name tags, etc.
Hdqrs	3 months	Official notice to delegates and alternates - Appendix C.
Chapter	2 months	Second mailing of meeting notice.
Chapter	1 month	Prepare name cards for Society and regional officers, delegates, alternates and committee chairs - Appendix E.
Chapter	1 month	Prepare and mail letter of invitation to employers listed for employer recognition event.
Chapter	15 days	Combined meeting of Conference Arrangement Committee, Director and Regional Chair and all subcommittees to discuss plans and review procedures. All planning should be completed and thoroughly checked.
Chapter	10 days	Prepare name tags for pre-registered attendees.
Chapter	1-2 days	Meet visiting dignitaries at point of arrival and escort to hotel. General chair should move into the hotel. Final meeting of Host Committee and Director and rehearsal; review all details.
DAY OF CONFERENCE		All is progressing smoothly.

*Director and Regional Chair shall be advised of all meetings of the Conference Arrangements Committee to allow his/her attendance, if possible. Minutes of meetings at which Director and Regional Chair is not in attendance shall be forwarded to the Director and Regional Chair within a few days following the meeting.

FOLLOWING THE CONFERENCE

<u>BY</u>	<u>LEAD TIME</u>	<u>ACTION</u>
Publicity Chair	ASAP	Forward brief report of meeting and pictures to Regional Chair for publication in ASHRAE Insights.
Regional Nominating Com Member	ASAP	Forward CRC Worksheet, Biographical Data Forms and other enclosures to Regional Chair, sending copies to Executive Director/Secretary in accordance with directions on worksheet.
Regional Chair	10 days	Forward CRC Worksheet, Biographical Data Forms and other enclosures to Executive Director/Secretary in accordance with directions on worksheet.
Conference Secretary	30 days	Draft minutes, double-spaced and submit to the Regional Chair.
General Chair	30 days	Submit final financial report to Regional Chair.
Regional Chair	60 days	Send approved minutes to Headquarters for distribution.
Regional Chair	At Members Council Meeting	Present CRC motions.

CHAPTER OPERATIONS WORKSHOP SAMPLE LETTER (OPTIONAL)

MEMORANDUM

TO: All Presidents of Region _____

FROM: _____, Chair, Region _____

RE: CRC Meeting, (location), (date)

At the CRC meeting the agenda includes a “Chapter Operations Workshop” on _____ beginning promptly at _____ and lasting until _____. The speakers will discuss the duties and problems of each chapter office and will provide you with insights into managing those offices in accordance with the attached agenda.

After each session there will be an open discussion or question-and-answer session.

As president of your chapter, no one realizes more than you the importance of pre-education before becoming an officer in one of our chapters. In these workshops advancing officers, as well as members who are interested in becoming officers, have an excellent opportunity to learn of the duties and problems of each office. The officer's work is made so much easier if he/she knows some of the operational procedures of the chapter offices and regional affairs.

I will certainly appreciate it if you will make a special effort to point out to all of your officers, committee chairs and members the importance of attending this workshop.

Thanks and kindest personal regards.

MANUAL FOR CONDUCTING CHAPTERS REGIONAL CONFERENCES

INVITATION TO COMMITTEE CHAIRS SAMPLE LETTER

M E M O R A N D U M

TO: All Chapter _____ Committee Chairs, Region _____

FROM: _____, Regional _____ Vice Chair

RE: CRC Meeting

Please consider this letter my personal invitation to you to attend the _____ Committee Workshop in (location, date, time).

I am looking forward to seeing you at the Chapters Regional Conference for Region _____, which is being held in (location, date). Based upon very reliable information, I hear the (host city) folks are really going to "put on the dog" for us and are planning the best Region _____ CRC meeting ever.

Your attendance at the CRC and the _____ Committee Workshop is most important for you, your chapter and for the future of ASHRAE. You can help your chapter win the Presidential Award of Excellence. Your input to the _____ Workshop is needed and perhaps you can gain some new ideas that will work for you in carrying out your responsibilities.

I am sure you are preparing a report of your chapter _____ activities for your chapter's report. Please send me a copy of your report prior to the CRC meeting. I need your report no later than (date). The following is information which the Society and I as Regional _____ Committee Vice Chair need:

1. Do you plan to attend the Regional Conference? If not, who will represent your chapter at the _____ Committee Workshop.
2. A report of current _____ committee activities in your chapter.
3. Any thoughts you have for future activities.
4. Your comments and suggestions as to how the Society can be of benefit to your chapter's _____ committee activities. Also, how your Regional _____ Committee Vice Chair can be of assistance to you and your chapter.
5. How you and your chapter handle (special projects).

See you in (city)!

cc: Regional Chair
Chapter Presidents

MANUAL FOR CONDUCTING CHAPTERS REGIONAL CONFERENCES

ATTENDANCE FOLLOW UP LETTER

(Date)

(Name)
President, _____ Chapter
(Address)

Dear _____:

The ___(Name)___ Chapter advises that they have not heard from some of your members who should attend the Chapter's Regional Conference in ___(City)___, ___(Date)___.

Please canvass your members, especially:

(List those who should be attending, i.e., committee chairs, delegates, alternates)

Also, the ___(Name)___ Chapter has advised me that it has received a list of those members of your chapter who were planning to attend the Conference. Many of the names on the list have not yet registered. Please contact these people also to make sure they get their registration in.

At this date, you should call ___(name/phone of Host Chapter, Registration Committee Chair)___, giving the names and hotel requirements, as well as registration function information, as soon as possible.

This should be a good meeting, Please help on attendance. Many thanks.

Sincerely,

(Name)
Chair, Region

cc: Secretary

P.S. It is especially important that your delegate and alternate attend this meeting and remain throughout the meeting. If you find it necessary to name a substitute for your chapter's delegate or alternate delegate, then please notify me immediately with a copy (to the secretary).

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BREAKFAST CAUCUS SAMPLE LETTER (OPTIONAL)

(Date)

(Name) (Address of Member and Alternate Member to the
(Address) Society Nominating Committee for (Year) officers)

(Name)
(Address)

RE: Breakfast Caucus, Chapter Regional Conference

Dear _____ and _____:

Since you are our Region's Member and Alternate Member to the Society Nominating Committee for (year) officers, I would greatly appreciate it if you would conduct the Breakfast Caucus at our CRC meeting in (city). The Breakfast Caucus is scheduled for (time and date). I have also asked _____ to attend the Breakfast Caucus to assist you in instructing all of the delegates and to explain the procedures of operation of the Executive Session and, in fact, all aspects of the CRC.

Since possible candidates for honors and awards and nominations, etc., will be discussed, I will not be permitted to attend.

Both of you have been involved in the two previous CRC caucuses, and I am confident that you can explain the duties and responsibilities and procedures required of all delegates and answer any questions which they may have.

Thanks in advance for accepting this assignment, and I look forward to seeing you both in (city). Let me know if you have any questions.

Sincerely,

Chair, Region (no.)

MANUAL FOR CONDUCTING CHAPTERS REGIONAL CONFERENCES

REMINDER OF RESPONSIBILITIES SAMPLE LETTER

M E M O R A N D U M

TO: All Chapter Presidents, Region (no.)
FROM: _____, Region _____ Chair
DATE:
RE: Chapters Regional Conference

This is just a reminder of your major responsibilities at the CRC.

First, you must plan to arrive at the hotel in time to attend the Chapter Operations Workshop which will start at (time) on (day). All chapter delegates and alternates must attend this in order not to lose points for CRC attendance-and any other chapter members who are on hand are urged to attend as well.

Next, don't forget that all delegates and alternates are required to attend the breakfast caucuses at 7:00 A.M. on Friday and Saturday mornings, the business sessions of Friday morning and Saturday afternoon and the Executive Session Saturday afternoon. This should be over by 4:00 P.M., after which you are free to leave if you're not staying over for the weekend.

Attached for your information is a copy of the agenda for the business sessions. You should bring before the conference any ideas which anyone in the chapter may have as to how some facet of Society operations could be improved, services which you think could be added, rules which you think should be dropped or modified, etc. Be sure to meet with your CRC Action Committee to get all possible input. Remember, any such items approved by the conference will be submitted by me as a motion to the Members Council at the January meeting in (city), and if approved by the Members Council, they will then be submitted to the Board of Directors for approval, so you do have input into the conduct of the Society.

Regarding the caucuses and Executive Session at the caucus, no nominations are made and no votes are taken. Names are submitted for consideration by the delegates and discussed as to qualifications, willingness to make the required commitment to serve, etc. I'll be there for opening instructions, after which I'll leave and only the delegates and the Nominating Committee members and alternates will be in the room to permit free and frank discussion. Actual nominations and voting are done in the Executive Session as a result of your discussions in the caucuses.

Remember that you will be voting on a new regional chair to take office July 1, 20__, along with a Nominating Committee member and alternate to serve for 20__ - 20___. Following our normal practice of switching the alternate to member and the member to alternate for three years in each spot, (name) would be elected member and a new person to replace (name), who has served the full time, to be elected as alternate.

In addition, you will be voting on the Society officers: President-Elect, four Vice-Presidents and a Treasurer. _____, the Treasurer, would normally move up to President-Elect, _____ is the Senior Vice President and would normally move up to Treasurer, _____ would normally be re-elected Vice President for his second year. That would leave one vice presidential position open and you could nominate any current Society member.

Finally, you can nominate anyone in the region for the position of director-at-large (there are nine of them on the Board, with three going off this year), and you can submit nominations for Nominating Committee members at large.

Remember that you nominate regional officers at the CRC. On the Society positions, your Nominating Committee

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member submits your choices as nominees at the meeting of the Nominating Committee. The choices of the Nominating Committee are then put on the Society ballot which is mailed to all members.

As to honors and awards, if you have any candidate for the Regional Award of Merit, he/she is elected by you at the Executive Session. If you have any other chapter members whom you think are qualified for a Society award, you, on behalf of your chapter, should write to the Chair, Honors and Awards Committee, addressed to Atlanta Headquarters, and propose his/her name, giving a copy of their bio and the chapter's reasons for feeling he/she is qualified for the award. The packet which you received from headquarters included a list of the available awards and some bio forms. Society awards are not voted on by the CRC. After approval by the Honors and Awards Committee, they are voted on by the Society Board of Directors.

Also, remember that you should have bio forms prepared for any candidates you have for regional office, with 20 copies so that a copy can be given to each delegate, alternate and Nominating Committee member.

You should make every effort to get your committee chairs for Membership Promotion, Student Activities, Chapter Technology Transfer and Research Promotion to the CRC, or else have some other chapter member on hand to attend the respective workshop. Remember, you can't make par for CRC attendance without full attendance by these people at the workshops. So if you miss here, you've shot your chances for the Star Award (and weakened your chances for the PAOE) before you get started!

The final item has to do with chapter reports, which are due at the first CRC business session. One copy of the report is to be sent to me at least two weeks prior to the CRC. The required report form is shown as an appendix of your Manual for Chapter Operations.

Each of the individual reports by the president and chapter committee chairs should be in a conversational, narrative style.

Hopefully, by the time you get this letter, you will have also received the mailing from (city) on the CRC. Talk it up in your chapter, line up attendance by your committee chairs and all other officers and members you can induce to attend. Try to get as many guests to come along as possible. They will enjoy the location, the social activities and the companion programs.

See you all in (city) !

cc: Nominating Committee Members
 Regional Vice Chairs

BOD 03-06-27-1C/BOD 04-01-23-2J

SAMPLE LETTER OF INVITATION TO EMPLOYERS

Date

Mr. Sam A. Smith, P.E., President
The Great Engineering Co.
12345-67 Engineer Street
USA 12345

Dear Ms. Boss:

The Northern Alberta Chapter of ASHRAE cordially invites you to attend an Employers' Recognition Breakfast to be held at 8:00 A.M., Thursday May 22, 2000 in the Strawberry Room of the King Edward Hotel, 10219-356 Avenue, Edmonton.

This year's Employers' Recognition Breakfast is being held in conjunction with the ASHRAE Region XI Conference that is being held in Edmonton on May 22-26, 2000. The breakfast will be attended by other leaders in the HVAC&R industry as well as senior ASHRAE Society Officers. At the breakfast you will have the opportunity to meet and talk to the Society Officers and other industry leaders.

This is one of the only ways we have of saying thank you to you and your company for your continual support of ASHRAE. Please come and join us for an hour and one half of fellowship.

Yours very truly,

Donald E. Holte
Treasurer

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HOST CHAPTER ASHRAE SAMPLE BUDGET

INCOME		PROPOSED BUDGET	ACTUAL	TOTAL
Chapter assessments		\$1,300.00	_____ @ _____ = _____	
Sponsors	20 @ \$200	<u>\$4,000.00</u>	_____ @ \$200 = _____	
SUBTOTAL		\$5,300.00		\$ _____
REGISTRATION				
CRC	160 @ \$20	\$3,200.00	_____ @ \$20 = _____	
Banquet	150 @ \$50	\$7,500.00	_____ @ \$50 = _____	
Welcome Reception	150 @ \$15	\$2,250.00	_____ @ \$15 = _____	
Awards Luncheon	125 @ \$20	\$2,500.00	_____ @ \$20 = _____	
President's Luncheon	125 @ \$20	\$2,500.00	_____ @ \$20 = _____	
Companion Tour	30 @ \$10	<u>\$ 300.00</u>	_____ @ \$10 = _____	
SUBTOTAL		\$18,250.00		\$ _____
TECHNICAL/SEMINAR				
Registration/Members	90 @ \$30	\$2,700.00	_____ @ \$30 = _____	
Registration/Students	40 @ \$25	\$1,000.00	_____ @ \$25 = _____	
MFG. Displays	20 @ \$250	<u>\$5,000.00</u>	_____ @ \$250 = _____	
SUBTOTAL		\$8,700.00		\$ _____
TOTAL		\$33,750.00		\$ _____

MANUAL FOR CONDUCTING CHAPTERS REGIONAL CONFERENCES

HOST CHAPTER ASHRAE CRC SAMPLE BUDGET

EXPENSES	PROPOSED BUDGET	ACTUAL	TOTAL
SOCIAL FUNCTIONS (Break-even)			
President's Luncheon 125 @ \$20	\$2,500.00	_____ (_____ People)	_____
Awards Luncheon 125 @ \$20	\$2,500.00	_____ (_____ People)	_____
Banquet 150 @ \$50	\$7,500.00	_____ (_____ People)	_____
Welcome Reception 150 @ \$15	\$2,250.00	_____ (_____ People)	_____
Companion Tour 30 @ \$10	\$ 300.00	_____ (_____ People)	_____
SUBTOTAL	\$15,050.00	\$ _____	\$ _____
TECHNICAL/SEMINAR			
MFG. Display Setup	\$ 600.00	_____ (_____ People)	_____
Lunch (160 people)	\$1,600.00	_____ (_____ People)	_____
Coffee Breaks	\$ 200.00	_____	_____
A/V Equipment	\$ 300.00	_____	_____
Contingency (20%)	\$ 540.00	_____	_____
SUBTOTAL	\$3,240.00	\$ _____	\$ _____
MISCELLANEOUS			
Gifts to Society Officers	\$ 150.00	_____	_____
Gifts to Committee Chair	\$ 250.00	_____	_____
Host Dinner	\$1,000.00	_____	_____
Workshop Materials			
Pad/Pencils	\$ 100.00	_____	_____
A/V Equipment	\$ 500.00	_____	_____
Coffee Breaks	\$ 300.00	_____	_____
Stationery	\$ 150.00	_____	_____
Contingency (20%)	\$ 485.00	_____	_____
SUBTOTAL	\$2,935.00	\$ _____	\$ _____
TOTAL	\$21,225.00	\$ _____	\$ _____
NET GAIN	\$12,525.00	\$ _____	\$ _____
(NET LOSS)	(\$ _____)	(\$ _____)	(\$ _____)

ASHRAE SAMPLE PROGRAM

AGENDA

THURSDAY, 8/20

8:00 TO 5:00 P.M.
REGISTRATION

8:00 A.M. TO NOON
CASUAL GOLF
FALMOUTH COUNTY CLUB
CALL DOUG MARTIN
MAINE AIR CONDITIONING
(207) 797-7414
TRANSPORTATION FROM THE
HOLIDAY INN TO THE FALMOUTH
COUNTRY CLUB AND BACK WILL BE
PROVIDED

1:00 P.M. TO 5:00 P.M.
TECHNICAL SESSIONS

"INSULATIONS AND MOISTURE
PROBLEMS IN BUILDINGS."
WILLIAM A. LOTZ, P.E.
THIS PRESENTATION WILL REVIEW
SEVERAL CASE HISTORIES OF
FAILURES CAUSED BY POOR
DESIGN/CONSTRUCTION INVOLVING
INSULATION/VAPOR BARRIERS AND
VENTILATION SYSTEMS. ITEMS TO
BE ADDRESSED WILL INCLUDE AIR
FLOW THROUGH FIBERGLASS BATT
INSULATION, VAPOR BARRIER
PENETRATION, INDOOR SWIMMING
POOL PENETRATIONS, INDOOR
SWIMMING POOL PROBLEMS,
INSULATED STEAM LINE
DIFFICULTIES AND THE
IMPORTANCE OF
DEHUMIDIFICATION.

"THE 1993 ENERGY CRISIS
REVISITED"
RICHARD HILL
UNIVERSITY OF MAINE
THE RESPONSE OF THE
GOVERNMENT AND THE PUBLIC TO
REAL OR PERCEIVED ENERGY
SHORTAGES HAS RESULTED IN A
NEW ENERGY ECONOMY/ THE
EMERGING SUPPLY AND DEMAND
MIXES WILL BE REVIEWED.

6:00 P.M. TO 9:00 P.M.
WELCOME
HORS D'OEUVRES RECEPTION
PORTLAND MUSEUM OF ART
THE MUSEUM, LOCATED IN THE

HEART OF DOWNTOWN PORTLAND,
WAS DESIGNED BY I.M. PEL AND
PARTNERS. TWO VERY SPECIAL
SHOWS ARE EXPECTED TO BE ON
EXHIBIT THIS SUMMER--"ARTISTS
YOU LOVE: MONET AND OTHER
MASTERS" AND "THE ELEGANT
AUTO: FASHION AND DESIGNS IN
THE 1930'S."

9:30-11_30 P.M.
HOSPITALITY SUITE
RELAX AND ENJOY
REFRESHMENTS, WHILE YOU MEET
WITH FELLOW MEMBERS OF
ASHRAE

FRIDAY, 8/21

7:30 - 8:00 A.M.
ORIENTATION

8:00 - 9:30 A.M.
CAUCUS
CONTINENTAL BREAKFAST
PROVIDED

9:15 - 2:00 P.M.
HISTORIC PORTLAND LANDMARK
TOURS

OUR TOUR WILL TAKE YOU TO
THREE HISTORIC PORTLAND
LANDMARKS. FIRST STOP WILL BE
AT THE VICTORIA MANSION. BUILT
OF BROWNSTONE IN THE ITALIAN
VILLA STYLE, THE MANSION HAS
BEEN DESCRIBED AS AN
ENCYCLOPEDIA OF NINETEENTH
CENTURY TASTE AND OPULENCE.
GUIDES WILL INTRODUCE YOU TO
BOTH THE HOUSE AND LIFESTYLE OF
A WEALTHY VICTORIAN. NEXT, TO
THE OLD POT FOR A LIGHT LUNCH
AT DIMILO'S FLOATING
RESTAURANT, A MORE RECENT,
BUT NO LESS SIGNIFICANT
PORTLAND LANDMARK. FROM YOUR
TABLE AT DIMILO'S YOU CAN WATCH
PORTLAND BUSY WATERFRONT T
AT WORK. JOHN V, A MAINE
HUMORIST AND WELL-KNOWN
STORYTELLER, WILL JOIN YOU FOR
LUNCH. THROUGH HIS STORIES,
JOHN WILL PAINT A PICTURE OF
DOWNEAST LIFE AND CULTURE
THAT WILL LEAVE YOU SMILING.
OUR LAST STOP IS THE BOYHOOD
HOME OF THE POET HENRY
WADSWORTH LONGFELLOW. THE
FIRST BRICK HOUSE TO BE BUILT IN

PORTLAND, IT CONTAINS
FURNISHINGS BELONGING TO AND
REFLECTING THE LIFESTYLE OF THE
WADSWORTHS AND LONGFELLOWS.
BACK TO THE HOLIDAY INN BY 2:00
P.M., SO YOU CAN PREPARE FOR
THE ASHRAE PRESIDENT'S DINNER.

9:45 - 11:45 A.M.
FIRST BUSINESS MEETING

NOON - 4:00 P.M.
OPERATIONS WORKSHOP,
LUNCH PROVIDED
HISTORIANS WORKSHOP,
LUNCH PROVIDED

6:00 P.M.
PRESIDENT'S RECEPTION
LIGHT SNACKS AND CASH BAR

7:00 P.M.
PRESIDENT'S DINNER
FOLLOWED BY COMEDY WITH
ABRAMS & ANDERSON
"ABRAMS & ANDERSON" WILL
ENTERTAIN YOU WITH THEIR
UNIQUE BRAND OF
IMPROVISATIONAL COMEDY. THEY
HAVE PERFORMED ALL OVER THE
COUNTRY, BUT CALL PORTLAND
HOME. ABRAMS & ANDERSON IS
COMEDY YOU PARTICIPATE IN!

11:00 P.M.
HOSPITALITY SUITE

SATURDAY, 8/22

7:00 A.M.
RISE AND SHINE SHOPPING AT
L. L. BEAN
CONTINENTAL BREAKFAST
SHOPPING AT 7:00 O'CLOCK IN THE
MORNING? YOU CAN SHOP
AROUND THE CLOCK, 365 DAYS A
YEAR (INCLUDING CHRISTMAS) AT
MAINE'S MOST FAMOUS STORE - L.
L. BEAN. MEET THE FRIENDLY
STAFF, EXPERIENCED OUTDOORS
STAFF, EXPERIENCED OUTDOORS
PEOPLE READY TO OFFER HELP
AND ADVICE ON ALL YOUR
PURCHASES. MAKE THE MOST OF
YOUR VISIT TO MAINE, AND YOUR
TIME OUTDOORS. DON'T WORRY
ABOUT BREAKFAST, ASSORTED
PASTRIES AND COFFEE WILL BE
PROVIDED.

7:30 A.M.

BUS DEPARTS FOR L. L. BEAN
(PROMPTLY AT 7:30 A.M.)
YOU WILL RETURN TO THE HOLIDAY
INN BY 11:00 A.M. (IN TIME TO
PREPARE FOR THE AWARDS
LUNCHEON.)

7:30 A.M.
EXECUTIVE SESSION
FULL BREAKFAST PROVIDED

7:45 - 11:45 A.M.
WORKSHOPS
CONTINENTAL BREAKFAST
PROVIDED

STUDENT ACTIVITIES
TEGA
MEMBERSHIP PROMOTION
CHAPTER PROGRAMS
RESEARCH PROMOTION
REFRIGERATION

NOON - 2:00 P.M.
AWARDS LUNCHEON
DOWNEAST-STYLE LOBSTER BAKE
EATING A LOBSTER (OR SITTING BY
SOMEONE WHO IS) CAN BE A VERY
MESSY AFFAIR! PLEASE WEAR
CASUAL CLOTHES TO THE
DOWNEAST FEAST.

2:15 - 4:30
SECOND BUSINESS MEETING

4:30 P.M.
HOSPITALITY SUITE

SOME ACTIVITIES ARE AVAILABLE
FOR AN ADDITIONAL FEE (SEE
REGISTRATION FEES).
PARTICIPATION IN SOME ACTIVITIES
IS LIMITED, ENROLLMENTS ARE
ACCEPTED ON A FIRST-COME,
FIRST-SERVED BASIS

ASHRAE MEMBERS, SPOUSES AND
GUESTS
ASHRAE MEMBERS AS
APPROPRIATE
ESPECIALLY ARRANGED FOR
SPOUSES/GUESTS



ASHRAE Region __ Chapter's Regional Conference <Year>

Date

Call to Order/Opening Remarks

Call to order at ____ a.m. by [DRC Name]

Opening remarks by [DRC Name]

Appointment of Secretary

[DRC Name] asked for a motion by ____ Chapter delegate ____ to appoint ____ as Secretary of the meeting. The motion was seconded on the floor and the vote was unanimous.

Appointment of Parliamentarian

____ appointed ____ as Parliamentarian. Mr. ____ charge is to enforce that Roberts Rules of Orders are followed during the meeting.

Roll Call of Delegates and Alternates – Business Meeting by _____

Chapter	Title	First Name	Last Name	
	CRC Delegate			Present
	CRC Alternate			Present
	CRC Delegate			Present
	CRC Alternate			Present
	CRC Delegate			Present
	CRC Alternate			Present
	CRC Delegate			Present
	CRC Alternate			Present
	CRC Delegate			Present
	CRC Alternate			Present
	CRC Delegate			Present
	CRC Alternate			Present
	CRC Delegate			Present
	CRC Alternate			Present
	CRC Delegate			Present
	CRC Alternate			Present
	CRC Delegate			Present
	CRC Alternate			Present
	CRC Delegate			Present
	CRC Alternate			Present
	CRC Delegate			Present
	CRC Alternate			Present

Introduction of Attendees [DRC Name]

[Click here to use the Template for CRC minutes on the ASHRAE Website.](#)

Name	Title	
	Society Treasurer	Present
	Society Vice President	Present
	Staff Member	Present
	CRC Chair	Present
	ARC	Present
	Regional Webmaster	Present
	RVC, Chapter Technology Transfer	Present
	RVC, Research Promotion	Present
	RVC, Student Activities	Present
	Nominating Member	Present
	Nominating Alternate	Present
	Regional Historian	Present
	Regional Treasurer	Present

Acknowledgement of Visiting Members in Audience

Review of Agenda – [DRC Name] – No additions requested

Vice-Presidential Presentation – [Name]

ASHRAE Staff Report – [Name]

Approval of [Year] CRC Minutes

Motion to approve the minutes by [Name], seconded by [Name], _____ Chapter. Motion passed, unanimously.

Regional Reports

Region Chair, [DRC Name]

Chapter Programs RVC – [Name]

Student Activities – [Name]

Chapter Technology Transfer Report – [Name]

Membership Promotion – [Name]

ARC Report – [Name]

Research Promotion – [Name]

Nominating Committee Member – [Name]

Historical Committee Report – [Name]

Treasurer’s Report - [Name]

Regional Web Site Report – [Name]

Chapter Reports and Reading of Motions

Motions will only be read. No voting took place.

Motion Identification No. Region X-YR-01

Moved by: _____ Chapter Delegate.

Motion:

Background Information:

Fiscal Impact:

Motion Identification No. Region X-YR-02

Moved by: _____ Chapter Delegate.

Motion:

Background Information:

Fiscal Impact:

Chapter Reports – Chapter Delegates

Adjournment

Chapter Reports Continued. [Date]

Motions and Resolutions

Motion Identification No. Region X-YR-01

Moved by: _____ Chapter Delegate.

Motion:

Background Information:

Fiscal Impact:

Discussion:

Vote Count: For: ___ Against: ___ Abstained: ___ (___ not voting)

Old Business

Adjournment

Meeting was adjourned at _____.

PRESS THE TAB KEY TO ENTER DATA IN EACH FIELD OR USE CURSOR FOR SPECIFIC AREAS:

CRC HISTORICAL PROFILE FOR 20_____

Region(s) Participating _____ Dates _____

Host Chapter _____ Size of Chapter _____

Chairperson _____ Location _____

Hotel _____ Room Rate _____

Date	# of Rooms Blocked	# of Rooms used

This information will be supplied by the hotel at the conclusion of the meeting. When negotiating the hotel contract you should include the following clause: No later than (30) days after the last official meeting day, the Hotel will complete a post convention report and send it to ASHRAE. Post convention report will include actual room pick-up, summary of catering revenues, outlet revenue, percent of single vs. double and smoking vs. non-smoking rooms used, total room revenue, number of no-shows by date, wash/slippage by day. In the event that there is a master bill at Hotel, ASHRAE will consider the Hotel's invoices to be incomplete-- and will withhold payment without incurring interest or penalty charges until such time as the post convention report is provided.

Package Registration Price _____ Number Sold _____
Audiovisual Cost _____ Meeting Room Rental _____
Number of CRC Sponsors _____ Sponsors Total Dollars _____
CRC Regional Seed Money _____ Returned _____
CRC Dollar Surplus (Deficit) _____

WORKSHOP	Attendance	Room Set (classroom, conference, theater, rounds) Include A/V set-up
Business Session		
Membership		
Historical		
Officers		
Student Activities		
Research		
Chapter Technology Transfer		
Caucus Meeting		
Technical Session		
Refrigeration		
CATERING	Guarantee	Actual
Welcome Party		
Luncheon		
Banquet		

cc: DRC, ARC, Regional Historian, Future CRC Chairs, ASHRAE Headquarters

MANUAL FOR CONDUCTING CHAPTERS REGIONAL CONFERENCES

OFFICER'S EVALUATION REPORT
FOR REGION CRC

I. In reviewing the CRC, the officer should consider and comment, but not individually rate the following:

A. General Attendance

Hotel accommodations (airport shuttle, check-in/out procedures, cleanliness, etc.)
Host chapter's preparation, announcements, and participation (quality, timeliness, effectiveness, etc.)
Protocol--reception and registration (preparation, efficiency)
Publicity--newspaper, radio and TV coverage (was there any, quality, type)

OFFICER'S COMMENTS

B. Business Sessions and Caucus

Meeting room arrangements (setup, cleanliness, in accordance with CRC Manual, etc.)
Attendance of delegates, alternates, committee chairs, and regional staff (headcount)
Regional reports and preparation (thoroughness, effectiveness, etc.)
Chapter reports (CRC summary complete and correct, thoroughness, complete)
Delegates' presentation of instruction from chapters' CRC Action Committees (preparation, effective, complete)

OFFICER'S COMMENTS

C. Workshops

Attendance of chapter committee chairs (headcount)
Workshop chairs preparation, agenda, presentations and program (audiovisual, handouts, effectiveness, etc.)
Workshop attendee participation (active, constructive, ASHRAE knowledge, etc.)
Attendance of chapter officers and members other than committee chairs (headcount)

OFFICER'S COMMENTS

MANUAL FOR CONDUCTING CHAPTERS REGIONAL CONFERENCES

D. Technical Sessions

- Meeting room arrangements and facilities (setup, cleanliness, audio-visual)
- Attendance (headcount)
- Technical content (related to ASHRAE)
- Technical presentations (effectiveness, relative, timely, etc.)

OFFICER'S COMMENTS

E. Social Activities

- Welcome party (setup, attendance, enjoyable, sociable, etc.)
- Luncheon and/or banquet (setup, attendance, effectiveness)
- Companion's activities

OFFICER'S COMMENTS

II. Review should give feedback to DRC and CRC Chair on:

A. Did the CRC achieve its goals? (Refer to the CRC Manual)

B. What was considered noteworthy or outstanding and could be passed on to other regions as suggestions that they can consider using.

C. Area for improvement that next year's DRC and CRC Chair should pay additional attention.

MANUAL FOR CONDUCTING CHAPTERS REGIONAL CONFERENCES

D. Other comments on CRC.

ASHRAE CRC Scheduling

Fall CRCs												
Year	I	II	III	IV	V	VII	IX	XII	XIII	RAL	Conflicts	
1998	Aug 3rd	Sep 2nd	Sep 4th	Aug 2nd	Aug 2nd	Sep 3rd	Aug 2nd	Aug 3rd	Aug 2nd	n/a	yes	Aug 2nd
1999	Aug 3rd	Aug 4th	Sep 3rd	Aug 3rd	Aug 2nd	Sep 2nd	Aug 2nd	Aug 2nd	Aug 4th	n/a	no	
2000	Aug 2nd	Aug 4th	Oct 1st	Aug 3rd	Aug 3rd	Sep 3rd	Aug 2nd	Aug 3rd	Aug 4th	n/a	no	
2001	Aug 3rd	Aug 4th	Sep 2nd	Aug 3rd	Aug 2nd	Sep 3rd	Aug 2nd	Aug 3rd	Sep 2nd	n/a	no	
2002	Aug 4th	Aug 4th	Sep 3rd	Aug 2nd	Aug 2nd	Sep 2nd	Jul 4th	Aug 3rd	Sep 1st	Sep 3rd	no	
2003	Aug 2nd	Aug 4th	Sep 3rd	Aug 3rd	Aug 3rd	Sep 3rd	Aug 3rd	Aug 3rd	Sep 3rd	Sep 1st	yes	Aug 3rd
2004	Aug 3rd	Aug 3rd	Aug 2nd	Aug 3rd	Aug 2nd	Sep 3rd	Aug 2nd	Aug 4th	Aug 3rd	Sep 4th	yes	Aug 3rd
2005	Aug 3rd	Aug 4th	Aug 2nd	Aug 3rd			Aug 2nd					
2006				Aug 3rd								
Target	Aug 3rd	Aug 4th	Aug 2nd	Aug 3rd	Aug 2nd	Sep 3rd	Aug 2nd	Aug 3rd	Aug 4th	Sep 3rd	no	
Backup	Aug 4th	Sep 2nd	Sep 2nd	Aug 1st	Aug 1st	Sep 2nd	Aug 1st	Aug 4th	Sep 2nd	Sep 4th	potential Aug 4th & Sep 4th	

Aug 1st	1st weekend in August
Aug 2nd	2nd weekend in August
Aug 3rd	3rd weekend in August
Aug 4th	4th weekend in August

Notes:

1. Data for 1998 - 2004 are historical.
2. Data for 2005 and beyond are scheduled.
3. A Region may schedule a CRC on the Target Weekend; approval by the DRC is required before signing a hotel contract.
4. If the Target Weekend is unavailable, the CRC may be scheduled on the Backup Weekend, but contact the DRC first, who will coordinate with other DRCs and Regions. Approval by the DRC is required before signing a hotel contract.

ASHRAE CRC Scheduling

Spring CRCs					
Year	VI	VIII	X	XI	Conflicts
1998	May 2nd	Apr 4th	May 2nd	May 3rd	no
1999	May 1st	May 1st	May 1st	May 3rd	no
2000	May 1st	May 2nd	May 2nd	May 2nd	no
2001	Apr 4th	May 1st	May 1st	May 3rd	no
2002	May 1st	Apr 4th	May 2nd	May 2nd	no
2003	Apr 4th	Apr 4th	May 3rd	May 2nd	no
2004	May 1st	Apr 4th	May 2nd	May 3rd	no
2005		Apr 3rd	May 1st	May 1st	no
2006			May 1st	May 2nd	no
Target	May 1st	Apr 4th	May 1st	May 2nd	no
Backup	Apr 4th	May 1st	May 2nd	May 3rd	no

Apr 4th	4th weekend in April
May 1st	1st weekend in May
May 2nd	2nd weekend in May
May 3rd	3rd weekend in May

Notes:

1. Data for 1998 - 2003 are historical.
2. Data for 2004 and beyond are scheduled.
3. A Region may schedule a CRC on the Target Weekend; approval by the DRC is required before signing a hotel contract.
4. If the Target Weekend is unavailable, the CRC may be scheduled on the Backup Weekend, but contact the DRC first, who will coordinate