

## CRC CHAPTER SUMMARY REPORT INSTRUCTIONS

**AFTER READING THESE INSTRUCTIONS, PRESS THE TAB KEY TO ENTER DATA ON THE FORM.**

### 1. MEMBERSHIP PROMOTION:

- **Area assigned members** = members who have paid society dues (available from the **Area Assigned Member Count Listing** on the ASHRAE website). At [www.ashrae.org](http://www.ashrae.org), select "Secure Chapter Volunteer Activity" on the left side of your screen. At the next page, scroll to the blue bar entitled "PAOE" and click on the first link, "Presidential Award of Excellence (PAOE)." Then log in. At the next page, click "View Reports." At the next page, select "**Area Assigned Member Count Listing**," and click on the "submit" button. The next page is the listing of Area Assigned Members and Students by chapter and region)
- **Chapter dues paying members** = number of members in current chapter roster, excluding students (available from the **Chapter Dues Paid/Unpaid Report**. This report is included in the Monthly Chapter Data Reports posted on the ASHRAE website at [www.ashrae.org](http://www.ashrae.org). The file name of the report is "paid\_unpaid\_".)
- **New members to date** = new chapter dues paying members (available from the **New Members Report**. This report is included in the Monthly Chapter Data Reports on the ASHRAE website at [www.ashrae.org](http://www.ashrae.org). The file name of the report is "new\_member\_".)
- **Delinquent members to date** = delinquent area assigned members (available from the **Society Unpaid Dues Report-Members**. This report is included in the Monthly Chapter Data Reports on the ASHRAE website at [www.ashrae.org](http://www.ashrae.org). The file name of the report is "member\_delinquency\_".)

**Instructions to access the Monthly Data reports are available on the ASHRAE website. At [www.ashrae.org](http://www.ashrae.org), select "Secure Chapter Volunteer Activity." At the next page, instructions and report access are provided under the blue bar entitled Monthly Chapter Data.**

### 2. STUDENT ACTIVITIES:

The number of new student members is available from chapter membership report.  
List the number of student branches the chapter is currently supporting.

Information that may be included in the attached chapter executive summary; number of K-12 student activities, number of post high school student activities, number of teach-ins per class to an organized student group and monthly meeting student nights.

### 3. Chapter Technology Transfer:

List the number of Chapter Technology Awards and the number of chapter presentations on refrigeration technology.

Information that may be included in the attached chapter executive summary; the number of presentations on HVAC&R technology to professional or business groups, number of presentations by an ASHRAE TC member, number of chapter sponsored continuing education courses, the number of Technology Award entries into chapter, regional and Society competition and Government Affairs Award entries into regional competition.

List the number of chapter technical sessions, technical seminars, programs or tours.

List the number of chapter social events.

List the average chapter monthly meeting attendance.

Information that may be included in the attached chapter executive summary; if the full chapter yearly programs and speakers and schedules were announced in the chapter newsletter by October 22, list of chapter programs and speakers.

### 4. RESEARCH PROMOTION/FUNDRAISING:

List the chapter goal and the total dollars contributed.

Information that may be included in the attached chapter executive summary; full circle level, number of RP nights, number of contributions \$50 and above, High Five Award and RP trends.

### 5. CHAPTER HISTORY:

Indicate if the chapter had a historical display at the CRC or has moved the current history information to the chapter website.

## ASHRAE CRC SUMMARY REPORT

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### 6. FINANCES:

List the chapter total funds balance (include all accounts), chapter dues, average monthly meal cost and the date of the last chapter audit.

Information that may be included in the attached chapter executive summary; the dollar amount for reserve funds, active checking, scholarship accounts. Describe any other sources of income and describe any special project or programs funded by the chapter.

### Contents of Chapter Executive Summary Attachment:

#### 1. Chapter Problems

List your chapter's problems and comment on your solutions to these problems.

#### 2. Chapter Innovations and Suggestions

Comment on any successes and new ideas that were introduced during the year.

#### 3. CRC Summary Form Background

Include a brief paragraph for each section of the CRC summary report form that highlights the chapter activities not included on the summary for each area.

**ASHRAE CRC SUMMARY REPORT**

**2005-2006 ASHRAE CRC CHAPTER SUMMARY REPORT**

REGION	<u>XII</u>		
CRC LOCATION	<u>FT MYERS, FL</u>		
CHAPTER	<u>PUERTO RICO</u>		
CHAPTER NUMBER	<u>110</u>	CHAPTER WEBSITE	<u>ASHRAEPR.TEXTAMERICA.COM</u>

	<b>YTD/REPORTED 2005-2006</b>	<b>REPORTED 2004-2005</b>	<b>REPORTED 2003-2004</b>
<b>1. MEMBERSHIP PROMOTION</b>			
NUMBER OF AREA-ASSIGNED MEMBERS (AAM)	<u>139</u>	<u>189</u>	<u>159</u>
NUMBER OF CHAPTER DUES PAYING MEMBERS (CDPM)	<u>110</u>	<u>75</u>	<u>83</u>
NUMBER OF NEW MEMBERS TO DATE (AAM)	<u>22</u>	<u>30</u>	<u>43</u>
NUMBER OF MEMBERS DELINQUENT TO DATE (AAM)	<u>51</u>	<u>113</u>	<u>76</u>
<b>2. STUDENT ACTIVITIES</b>			
NUMBER OF NEW STUDENT MEMBERS	<u>4</u>		<u>59</u>
NUMBER OF ACTIVE STUDENT BRANCHES	<u>3</u>		<u>2</u>
<b>3. CHAPTER TECHNOLOGY TRANSFER</b>			
NUMBER OF CHAPTER TECHNOLOGY AWARDS	<u>1</u>	<u>0</u>	<u>0</u>
NUMBER OF PRESENTATIONS ON REFRIGERATION TECHNOLOGY	<u>2</u>	<u>0</u>	<u>0</u>
NUMBER OF CHAPTER TECHNICAL SESSIONS, TECHNICAL SEMINARS, PROGRAMS OR TOURS	<u>17</u>	<u>7</u>	<u>13</u>
NUMBER OF SOCIAL EVENTS HELD SEPARATE FROM A TECHNICAL PROGRAM (I.E., GOLF TOURNAMENTS, CHRISTMAS PARTY, PICNICS, ETC.)	<u>1</u>	<u>0</u>	<u>2</u>
CHAPTER MONTHLY MEETING ATTENDANCE (AVERAGE)	<u>54</u>	<u>50</u>	<u>50</u>
<b>4. RESEARCH PROMOTION/FUNDRAISING</b>			
CHAPTER GOAL	<u>2500</u>	<u>3163</u>	<u>2540</u>
TOTAL DOLLARS CONTRIBUTED	<u>2080</u>	<u>2500</u>	<u>3078</u>
<b>5. CHAPTER HISTORY</b>			
CHAPTER HISTORICAL DISPLAY AT CRC	<u>NO</u>	<u>NO</u>	<u>YES</u>
CHAPTER HISTORY MOVED TO WEB SITE	<u>YES</u>	<u>NO</u>	<u>NO</u>
<b>6. FINANCES</b>			
TOTAL FUNDS BALANCE	<u>8150.00</u>	<u>10867.07</u>	<u>2319.70</u>
CHAPTER DUES	<u>4080.00</u>	<u>9072.00</u>	<u>6080.00</u>
MEMBER COST OF MEALS	<u>0</u>	<u>0</u>	<u>0</u>
DATE OF LAST CHAPTER AUDIT	<u>8/31/05</u>	<u>NOT DONE</u>	<u>7/29/04</u>

**FALL CRCs – ENTER DATA FOR THE YEAR JUST COMPLETED IN THE “YTD REPORTED” COLUMN AND ENTER DATA FOR YEAR-END RESULTS OF PREVIOUS YEARS IN THE LAST TWO COLUMNS.**

**SPRING CRCs – ENTER DATA FOR THE CURRENT YEAR IN THE “YTD REPORTED” COLUMN AND ENTER YTD RESULTS OF PREVIOUS YEARS IN THE LAST TWO COLUMNS.**