

2019-2020 ASHRAE CRC CHAPTER SUMMARY REPORT

REGION	VIII	CHAPTER WEBSITE: ASHRAECOK.ORG		
CRC LOCATION	VIRTUAL			
CHAPTER	CENTRAL OKLAHOMA			
CHAPTER NUMBER	068			
1. MEMBERSHIP PROMOTION		YTD/REPORTED 2019-2020	REPORTED 2018-2019	REPORTED 2017-2018
NUMBER OF AREA-ASSIGNED MEMBERS (AAM)		287	286	292
NUMBER OF CHAPTER DUES PAYING MEMBERS (CDPM)		146	165	142
NUMBER OF NEW MEMBERS TO DATE (AAM)		20	12	1
NUMBER OF MEMBERS DELINQUENT TO DATE (AAM)		16	23 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)	66 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)
2. STUDENT ACTIVITIES				
NUMBER OF NEW STUDENT MEMBERS		17	23	11
NUMBER OF ACTIVE STUDENT BRANCHES		3/5	1 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)	1 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)
3. CHAPTER TECHNOLOGY TRANSFER				
NUMBER OF REGULAR MONTHLY MEETINGS WITH TECH PROGRAM		9	10 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)	10 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)
MONTHLY MEETING ATTENDANCE (TOTAL/AVERAGE)		55 (63 PRE COVID)	55 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)	50 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)
NUMBER OF SEMINARS, ALI COURSES, TOURS OR OTHER TECHNICAL PROGRAMS OUTSIDE REGULAR MONTHLY MEETING		4	7 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)	3 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)
NUMBER OF TECHNICAL PROGRAMS ON REFRIGERATION TECHNOLOGY		3	1 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)	1 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)
NUMBER OF SOCIAL EVENTS SEPARATE FROM A TECHNICAL PROGRAM (I.E. GOLF, MEMBER'S NIGHT OUT, ETC.)		7 (MANY MORE WERE PLANNED, BUT CANCELED DUE TO THE PANDEMIC)	15 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)	9 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)
NUMBER OF TECHNOLOGY AWARD SUBMITTALS TO CHAPTER/REGION		0	0 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)	0 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)
4. RESEARCH PROMOTION/FUNDRAISING				
CHAPTER GOAL		\$43,000	\$47,000	\$46,000
TOTAL DOLLARS CONTRIBUTED		\$24,790	\$27,074	\$30,108
5. GOVERNMENT AFFAIRS				
LIST THE CHAPTER GOALS AND GRASSROOTS ADVOCACY OF THE PAST YEAR (USE SEPARATE PAGE)		SEE REPORT	SEE PREVIOUS REPORT	SEE PREVIOUS REPORT
INFORMATION THAT MAY BE INCLUDED: HOLDING COMBINED CHAPTER MEETINGS WITH OTHER ORGANIZATIONS TO DISCUSS HVAC&R, VISITING ELECTED/APPOINTED OFFICIALS, HOLDING A "DAY ON THE HILL," INVITING ELECTED/APPOINTED OFFICIALS TO SPEAK AT CHAPTER MEETINGS				
SEEKING PROCLAMATIONS FROM GOVERNORS, MAYORS AND OTHER ELECTED OFFICIALS FOR NATIONAL ENGINEERS WEEK (E-		NO	YES	YES

WEEK)				
SOLICITING NOMINATIONS FOR THE GOVERNMENT ADVOCACY AWARD AND OBTAINING GOVERNMENT AFFAIRS AWARD ENTRIES INTO REGIONAL COMPETITION		NO	SEE PREVIOUS REPORT	SEE PREVIOUS REPORT
NUMBER OF ADVOCACY MEETINGS AND OTHER ACTIVITIES		SEE REPORT	SEE PREVIOUS REPORT	SEE PREVIOUS REPORT
OTHER GRASSROOTS ACTIVITIES NOT MENTIONED ABOVE (USE SEPARATE PAGE)		SEE REPORT	SEE PREVIOUS REPORT	SEE PREVIOUS REPORT
6. YOUNG ENGINEERS IN ASHRAE (YEA)				
NUMBER OF NEW YEA MEMBERS		13	6	N/A
NUMBER OF TOTAL YEA MEMBERS		63	N/A	N/A
PERCENTAGE OF YEA MEMBERS FROM THE TOTAL CHAPTER MEMBERSHIP		22%	N/A	N/A
7. CHAPTER HISTORY				
CHAPTER HISTORICAL DISPLAY AT CRC		N/A	YES	YES
CHAPTER HISTORY MOVED TO WEB SITE		YES	NO	YES
8. FINANCES				
TOTAL FUNDS BALANCE		\$34,501.84	\$38,511.36 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)	\$25,197.02 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)
CHAPTER DUES		\$40	\$40 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)	\$40 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)
MEMBER COST OF MEALS		\$30/\$40	\$30/\$40 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)	\$25/\$30 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)
DATE OF LAST CHAPTER AUDIT		NOVEMBER 2019	TBD SUMMER '19 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)	7/9/2018 (THIS INFO IS PULLED FROM LAST YEAR'S CHAPTER SUMMARY REPORT)

Executive Summary

We had a fantastic year this year. We were able to recruit new volunteers, increase diversity among leadership, and increase diversity among speakers. I am particularly pleased of the more balanced representation among our speakers this year. Historically, our speaker rosters are majority white and male. I want to change that this year. The speakers were all chosen because of their expertise, but I challenged my CTTC chair to make an effort to be aware of unconscious bias and include more diverse speakers. In addition, I helped recruit speakers. As a result, our monthly chapter meeting speakers this year included four women and two people of color. I also actively recruited diverse volunteers this year. As a result, we will have more diverse leadership next year as well.

Before the pandemic hit, we were showing a 15% increase in average monthly chapter meeting attendance.

I am very proud that we were able to continue functioning as a chapter despite the global pandemic. We successfully switched to a digital platform, purchasing Zoom and utilizing GoToMeeting from society. The events that could be transitioned to virtual ones were while the rest had to be postponed or canceled. The shift has significantly decreased attendance to events, but it is more important to host digital events with lower attendance than to host no events at all and completely lose touch with membership.

I am proud of our Sustainability Event this year. We had over a dozen volunteers to clean up the riverfront in downtown OKC. This was one of the largest turn-outs for this event in recent history. We had two more events scheduled for the spring. A build with Habitat for Humanity (new event for us) and a day with Rebuilding Together OKC (typically our spring sustainability event). The first event was postponed until June and the second had to be cancelled canceled due to the pandemic.



We successfully hosted our first Diversity in ASHRAE event. It was a digital happy hour to discuss the needs of minorities in the chapter and how they can be supported.

Most of our student branches are thriving and student members are regularly attending Monthly Chapter Meetings. We sponsored eight students to attend the Winter Conference and AHR Expo this year. Several of our student members were also speakers at the conference and are active in TCs.

My MBOs this year were:

1. Increase funds raised to fully fund all programs
 - We raised enough funds for all programs this year and solicited new corporate sponsors.
2. Gain 10 new volunteers
 - We gained at least 11 new volunteers
3. Gain 10 new first-time attendees at chapter events
 - We gained more than 10 new first-time attendees

Most of our success came from overcoming problems. Those successes are detailed in the following section.

1. Chapter Problems

The Central Oklahoma Chapter has three problems that we have been working through.

First, historically the Central Oklahoma Chapter has had some of the most fantastic volunteers. Unfortunately, they seem to be the same 20 or so people every year. To prevent volunteer

burnout, it was my goal to introduce new volunteers into the ranks. Every chapter chair has a co-chair and at least one other committee member. I achieved this by simply asking who in the chapter wanted to get involved. In the spring of last year I send a survey to all chapter members asking how they would like to volunteer. Every person who wanted to volunteer was given a committee, co-chair, or chair assignment. We have successfully added 11 new volunteers this year. Many of these new volunteers are continuing to volunteer in the upcoming society year.

Second, the chapter did not have enough chapter funds to fully support all of the programs that we offer. In order to reimburse hotel cost for Centralized Training, students to attend the Winter Conference, and pay for YEA events, the chapter needed to raise additional funds. However, donor fatigue was a concern that had to be considered. So, we completely revamped the way we ask for money. With the help of the Research Promotion team, I created a Sponsorship Menu for potential sponsors. The entire list of companies with ASHRAE members was divided among the Board of Governors, select chapter chairs, and myself. We made contact and were able to solicit the funds need to fund the chapter as well as Research Promotion sponsorships with a single phone call to each company. We have several new sponsors this year and raised enough to fully fund all of our programs.

The third problem was noticed just a few months ago. Over the last few years, chapter events demographics seem to be skewing more toward the sales section of our industry. While it is vitally important that we maintain our valuable rep members' engagement, we need to ensure that we are boosting our consulting, owner, and contractor member attendance to keep the room balanced. The room is not so heavily filled with sales engineers to be a cause of concern, yet, but we want to stop the trend before it becomes an issue. This effort to get other sections of our industry engaged will surely span several years, but we started by focusing on the consulting engineering sector of our industry. The Membership Promotion and YEA Chairs were tasked with reaching out to the five major engineering companies in the Oklahoma City area. Individual meetings with engineering managers were arranged to personally invite them to YEA and other chapter events. This allows them to see the benefits of ASHRAE membership and chapter engagement thus increasing the likelihood that they will support their employees' ASHRAE membership. The results on this effort will likely not be tangible for a few years, but the effort to shift the demographic of attendees at chapter events has started.

2. Chapter Innovations and Suggestions

It is important to maintain high numbers of active volunteer. Often, extroverts have no problem stepping up and volunteering without prompting. Introverts, on the other hand, tend to need to be invited to volunteer. Since introverts account for approximately 40% of the population, we were potentially missing out on a number of volunteers. It was important to me to reach out and personally invite people to volunteer. This was accomplished by an email survey asking how people would like to volunteer. Each committee was described and the responsibilities of each chair position were outlined. The survey was sent to all chapter members to solicit new volunteers. We succeeded in added 11 new volunteers.

Included in the volunteer survey was an opportunity to suggest topics for our technical meetings. Those suggested topics were provided to the CTC committee to help them shape the chapter meetings for the year. I think providing requested content to chapter members was a factor that helped boost our meeting attendance by 15%.

To make sure all of the chapter chairs knew how much they are valued, I had one-on-one meetings with all of them twice during the year. We had our initial meeting in the summer of last year to plan the year and set MBOs. We had our second meeting in February of this year as a mid-year check-in. These meetings were not something that I experienced as a chapter chair and wish I would have. It gave the chairs and I a chance to speak frankly about how things were going and

allowed me to support them in achieving their goals. The mid-year check-in meetings is when the possible issue of shifting event demographics was noticed. Without those meetings, the trend likely would not have been spotted until it became an issue.

We completely revamped the way we solicit funds. We combined soliciting RP and chapter donations into a single ask to avoid donor burnout while increasing donations to fully fund all of our programs.

We hosted a Mentor Matching session as part of a YEA event. YEA and non-YEA members attended and learned what it takes to be a mentor/mentee and got a chance to get to know each other. Since mentorships evolve organically, this event was important to give members a chance to find each other. This event supported the Society YEA Committee's goal of providing more mentoring opportunities to young members.

We have purchased a membership to Zoom and are hosting chapter meetings, BOG meetings, YEA events, SA events, Companions' Night, and Diversity in ASHRAE events digitally.

3. CRC Summary Form Background

A. MEMBERSHIP PROMOTION:

Despite the pandemic causing job losses (and thus ASHRAE membership funding from employers) our total membership numbers have stayed relatively stable from last year. We have gained 20 new members this year versus 12 last year and one the year previous. This shows that we may need to work on retention in the years to come.

B. STUDENT ACTIVITIES:

Three of our five student branches are active as compared to one last year and the year previous. Student members are regularly attending chapter meeting and participating in YEA events.

We participated in a STEM Expo at a local technology school. We visited our Student Branches at The University of Oklahoma, Oklahoma State University, and The University of Central Oklahoma. We had second visits scheduled at all three universities and an additional one scheduled at Oklahoma City Community College, but they were all canceled due to school closures associated with the pandemic. Instead, we created a digital YEA/Student Mixer and a Student Research Update session to keep in touch. The YEA/Student Mixer had good participation from both groups. The purely social event lasted two hours and was a precursor to the planned Student Research Update. The update is scheduled for the end of May for students working on ASHRAE funded projects that will be presenting at the Annual Conference. The program will allow the students to practice their presentations and give chapter members the chance to provide insights and offer advice before the students present to the society.

We sponsored eight student to attend the Winter Conference and AHR Expo. Our chapter awarded two \$1,500 scholarship to local college students from an endowed scholarship.

Ilchung Park from Oklahoma State University received a \$5,000 ASHRAE Undergraduate Program Equipment Grant titled, "Development and Testing of Small Capacity Positive Displacement Refrigerant Pumps for Heat Exchanger Tests".

C. CHAPTER TECHNOLOGY TRANSFER:

This year we focused on quality of events over quantity. This method has shown success. When the average attendance pre-COVID at monthly chapter meetings, it increased 8 people over last year. This is a 15% increase in attendance. We also had good attendance at our BOG meetings, YEA events, Companions' Event (where we hosted a sitting US Congresswoman), GAC events, Sustainability event, and others.

These were the topics discussed at our monthly chapter meetings:

- Construction and Law: The Good, the Bad, and the Ugly of Government Contracting
- System Effects on Ductwork
 - Presentation by an ASHRAE TC Member
- VAV Diffuser Systems vs Traditional VAV Box Systems
- High-Performance Sequences of Operation for HVAC Systems in ASHRAE Standard 36
- ASHRAE and SMACNA Panel – featured six experts
- Variable Primary Flow and Heat Recovery Chillers
 - Refrigeration Topic
- Refrigerant Update
 - Refrigeration Topic
- The Future of the HVAC&R Industry, Trends, Risks, and Opportunities
 - Refrigeration Topic
 - Life Members and Past Presidents Recognition
 - Joint Meeting with AIA
 - Speaker was Society Vice President Bill McQuade
- Student Research Update
 - Collaboration with our Student Branches

It was a personal goal to have more diverse experts speak at our meetings. In years past, it was not uncommon to go years without hearing from a female expert or expert of color. This year we hosted four female speakers and two speakers of color.

D. RESEARCH PROMOTION/FUNDRAISING:

Our chapter achieved Full Circle early in the year. All of our Chapter Officers donated \$200 to RP (more than the minimum required donation to qualify for Full Circle). Some of our chapter chairs also personally donated to RP. The chapter donated \$250 to RP in the memory of a long-time, very active member who passed away last year, Albert Janco. This amount was chosen so that he would be recognized in Society published lists of donors.

The Central Oklahoma Chapter normally hosts three RP events each year, our golf tournament in the fall and a poker tournament and sporting clays event in the spring. These three events raise the majority of the RP goal. The golf tournament had 19 teams and several sponsors. We raised \$18,000 towards our RP goal. Because of the pandemic, our poker tournament was cancelled and our sporting clays event has been postponed until June. Like most chapters, we will be struggling to meet our RP goal this year.



We have 53 donors contributing \$50 or more.

E. GOVERNMENT AFFAIRS:

Goals for the year:

1. Establish a list of government officials (at any level of government relevant to buildings, engineering or construction, including building officials, school system facility staff, state energy code officials, etc.) along with their contact information. Reaching out and making several contacts and providing additional position papers etc.

- We had success on extending our existing list of contacts and will continue to focus on this particular MBO in future years.
2. Grassroots government activities training for chapter officers and future leaders (minimum 1 hour of training).
 - This goal was achieved with a training session in February.
 3. Articles on a grassroots government activities-related (e.g., state provincial, or local legislative or regulatory issue) published in a chapter newsletter or posted on a chapter website with copy sent to RVC one week before CRC.
 - This goal was achieved.
 4. A documented personal contact by a chapter member with government officials (at any level of government relevant to buildings, engineering or construction, including building officials, school system facility staff, state energy code officials, etc.) with the goal of promoting ASHRAE related subjects or Chapter goals and objectives, with notification sent to the ASHRAE Government Affairs Office.
 - This goal was achieved several times.

- We hosted a joint Government Outreach Day with the Northeast Oklahoma Chapter in February. We successfully met with over a dozen lawmakers and their staff. We made sure they were aware of a House Bill that would require at least one engineer to sit on the Oklahoma Uniform Building Code Commission and provided resources available through ASHRAE. We filmed a promotional video for society after our legislative visits.



- Our panel discussion chapter meeting included two code officials from nearby municipalities. They attended and ASHRAE meeting for the first time and participated in the discussion providing valuable input to the discussion.
- Several chapter members attended two Oklahoma Uniform Building Code Commission (OUBCC) meetings. This entity recommends to legislature which building codes to adopt. Currently, for commercial buildings, the state is under the 2015 family of codes with the exception of the energy code (IECC). Oklahoma is under the 2006 IECC. Coupled with a letter of support from the Society President, I addressed the Commission on both occasions to support the adoption of the full family of 2018 International building codes. We were able to see two motions pass. The first formed a technical committee to review, modify, and ultimately recommend to legislature to adopt the 2018 family of International Codes for commercial buildings with the exception of the International Energy Conservation Code (IECC). With the second motion, the OUBCC formed a technical committee to present the differences among the 2012, 2015, and 2018 versions of the IECC to the OUBCC. Then, the OUBCC

plans to choose which energy code they will investigate and recommend that legislature adopts. This is the most progress that state has made in over eight years!

- We hosted a sitting Congresswoman from the US House of Representatives for our Companions' Event in May. This event was on her schedule for months and was supposed to be a swanky evening affair, but it turned into a virtual meeting instead. Society had a goal of 45 meetings with federal officials this year. This event was the 45th event helping Society reach their goal!



5. Have the incoming Chapter GAC committee chair attend the GAC CRC workshop.
 - This will be accomplished at the CRC.
6. Increased communication between the GAC Chair and the GAC RVC.
 - This goal was accomplished with nearly weekly check-ins.

F. YOUNG ENGINEERS IN ASHRAE (YEA):

Our growth in YEA members doubled over last year (13 new YEA members this year versus 6 last year). I think a contributing factor to this is the visibility of YEA members among the volunteers and leadership.

We hosted a total of five YEA events. Two of those events were happy hours. One of them was a Mentor Matching session. This was a joint event with MP. YEA and non-YEA members attended and learned what it takes to be a mentor/mentee and got a chance to get to know each other. Since mentorships evolve organically, this event was important to give members a chance to find each other. Another event was a Video Game Night. We met on a Discord server to chat while we played an online multi-player game together. It was a way to connect digitally since we could not meet in person. The last event was a virtual YEA/Student Mixer. We had a dozen attendees total and good connections were made. This screenshot was grabbed mid-laugh near the end of the event. Clearly we had a good time.



We had a disc golf tournament planned for the fall that had to be postponed to the spring due to weather. And we know how this spring turned out... We plan to host this event soon, city orders permitting.

We had a Poker Practice night scheduled in March. Since one of the barriers for women and young folks in the industry is not knowing how to participate in events (they may not golf or play poker), it was important to host an event to teach them the skills necessary to confidently participate in the joint YEA/RP Poker Tournament. This event had to be canceled due to the pandemic.

We had a Board Game Night scheduled in March. It was also canceled due to the pandemic.

We had a Brewery Tour planned for May. This would have been a joint YEA/Refrigeration event with ASPE. It was canceled due to the pandemic.

G. CHAPTER HISTORY:

The Central Oklahoma Chapter typically has a Historical Display at the CRC. Since it is a virtual event this year, I suppose no one will. There is abundant Historical information on our website. Our Chapter Historian completed the most recent five-year summary for the years 2011-2016. It was submitted for the Blue Ribbon Award.

H. FINANCES:

The chapter has a checking account (current balance: \$23,331.78) for typical income/expenses and an investment account which are funds to host future CRCs. We have found it valuable to save money every year to cover the costs of initial deposits for hosting the CRC so that account typically receives an additional \$1,000 at the end of the society year. The current balance is \$11,170.06. The Central Oklahoma Chapter is next scheduled to host the CRC in 2032.

We also have an endowed scholarship at the Oklahoma City Community Foundation that funds up to \$3,000 in scholarships every year. We awarded two \$1,500 scholarships this year.

We spent \$3,000 to sponsor 8 students to attend the Winter Conference and AHR Expo.

For the first time, we added to the budget to reimburse hotel cost for centralized or other required training for chapter chairs. These expenses historically fell on the volunteer to cover.

Our chapter meetings are revenue neutral.

Before the pandemic impacted things, we were sticking pretty close to the board approved budget for the year. Our chapter budget was balanced at \$68,200. Currently, we have \$45,060.80 in income and \$42,907.49 in expenditures. We are now projected to have a slight surplus at the end of the year. Some of that surplus will likely be used to help reach our RP goal.