ASHRAE RP

Introduction to the RP Campaign
What is RP?

Research Promotion
• RP raises more than $2 million annually for ASHRAE Research

Other Resources ($800k)
• **Education** (ASHRAE Learning Institute)
• **ASHRAE Foundation**
  • Research Endowed Funds
  • Scholarships
• **General Fund**
  • Contributions support special Board approved projects and programs
  • **YEA Leadership Program**
What is RP?

• “Research Promotion”:
  • Continuation of ASHRAE’s original fundraising program
  • Originally supported only Research
  • Donor Honor Roll in publications since 1959, starting with $72,000 raised
    • 500% increase in support since 1959
• All under umbrella of “Development”
  • Kim Mitchell, Chief Development Officer (kmitchell@ashrae.org)
• Different committee working and reporting structures
• Common mission: support ASHRAE!
Who is RP?

- Grassroots Committee

ExCom

RVCs

Chapter Chairs

Chapter Chairs

Chapter Chairs
Chapter Goals

• Based on chapter RP history
• Set by RVC and DRC
• Common questions and concerns – p. 89
Research

• $5+ million annually
  • Research Projects
  • Grant-in-Aid Projects (graduate students)

• 59 Active Projects
  • Average cost: $159,696
  • Every Region has Research!
ASHRAE Research & the Industry

• Mission: To improve the quality of life and to answer tomorrow’s questions through research today.

• Development of technical information to create standards and guidelines, which serve as the basis for testing and design practices around the world.

• Backbone to the Handbooks, Journal, Standards, Certification, and educational courses
ASHRAE Research

• Improves our lives
• Protects us from harm
• Protects the environment
• Saves lives
Appealing to Donors

• Think of ASHRAE without Research …
• Think of the Industry without Research …
  • How would you do your job?

• Money back to the Region
  • Their money can return to research in their area

• $1 donated = $2* to Research
  • Not staff, not overhead, not items …
Education, General & YEA

**Education**
- ALI - ASHRAE Learning Institute
  - Development of new Courses and Training Materials

**YEA Leadership Program**
- Supports Young Engineers in ASHRAE in leadership and industry training

**General Fund**
- Unrestricted
- Supports different projects and can be used by all departments
- Helps supplement Dues, Ad sales and Bookstore sales
ASHRAE Foundation

• Endowments to support ASHRAE forever
• How it works:
  • Endowed = principal is invested forever; interest earned is spent on program
  • ASHRAE Interest Rate = 5%

• 1st year = RP Campaign credit for full amount
• 2nd year+ = Campaign credit for 5% interest earned
  • Can be added to every year to build principal
Appealing to Donors

• Honorariums or Memorials to thank dedicated Members
• Investing of Chapter Funds from ‘better than normal’ Special Events
  • No more than 50% of annual Chapter Gift
• Research is the largest endowment, but any fund of the Campaign may be endowed
• Ensure support of your passion forever
ASHRAE Scholarships

• Supporting the industry’s students
Appealing to Donors

• Support tomorrow’s HVAC&R engineers
• Chapter named Scholarships
  • Removes the work & liability from the Chapter
  • Set 5% return on money
  • Chapter dictated criteria
• Newly raised funds count toward RP Goal
• Unlike endowed funds, the 5% earned does not return to the Chapter’s goal each year
Donor Intent

• Donors decide where their money goes
• Keep accurate and clear records – use donor breakdown and include documentation
• “What fund do you want to support?”
• “The Tennis Tournament supports our Chapter’s RP Campaign and proceeds go to Research.”
• “Proceeds from the 50/50 Raffle go to our Chapter Scholarship”
RP Campaign Basics

• If it earns PAOE points, send it to your RVC and RP Staff
  • Just a quick e-mail
• Track your Campaign
  • Real Time Reports
  • Spreadsheet
• Stay organized
  • Action Plan
  • Summary Form
• Time Management
  • Week-by-week Planning
• All Important Forms and To-Do Lists are found in the Training Manual and on-line at www.ashraerp.com
• Don’t hesitate to ask for a gift and always say Thank You!
RP and PAOE

• Entered by Staff
  • Tracked on the Spreadsheet through your reporting

• Majority of points are tied to Dollars Raised and Fundraising Deadlines
  • Minimum: 800
  • PAR: 1050
  • Non-Financial Points available: 290!
RP and PAOE Deadlines

- October 15: Volunteer Committee, Donor Recognition
- November 15: Full Circle and Full Circle Plus
- December 31: 30% of Goal
- March 15: Scholarship Goal
- June 15: 100% of Goal
- June 30: Year End Deadline
- Spring: RP Night
- Year Round: Special Events, Endowments, Major Donors ($10,000+)
The BIG Deadlines for 2019-20

• June 30
  • Credit Card gifts will be accepted until 11:59pm EST
  • www.ashrae.org/contribute
PAOE Items – Volunteer Committee

• Much needed help with your RP Campaign
  • You should not take on this job alone!
• Builds excitement and involvement
• Educates others about RP
• Take advantage of talent and connections
• Assist with Calling Campaigns
  • Using contacts and personal asks for chapter support
  • Great way to renew donor support by talking to donors one-on-one

• Deadline: October 15
PAOE Items – Donor Recognition

• Opportunity to thank last year’s donors
  • Say THANK YOU often and with meaning
    • Not just “stuff” you have to give out

• Celebrate!
  • Make sure donors feel appreciated

• Deadline to host Donor Rec Night is December 31
PAOE Items – Scholarship Goal

• Highlights an important fund for Development
• New donor potential
• Opportunity to support Chapter scholarships
• Help ASHRAE fully fund the President’s Scholarship
• Deadline: March 15
• Minimum $100 leadership gift from all officers
  • Lead by example
  • President, President-Elect, Vice President, Secretary, Treasurer, RP Chair

• Full Circle Plus
  • Once Full Circle has been met, additional PAOE points for each $100+ gift made by another board member
    • The member must be listed on the chapter roster to qualify

• Deadline for both: November 15
PAOE Items – Special Events and RP Nights

• Special Event fundraisers are held by every chapter to help raise money for RP
  • Submit a summary form with full donor names, contributor numbers, and complete contact information (for new donors)

• Host a RP Night at a chapter meeting in the Spring
PAOE Items – Goal, High Five, Challenge, and APEX

• Goal: Set by DRC and RVC for each chapter

• High Five: The largest amount of money for your chapter over a five year period

• Challenge Goal: A chapter’s High Five (the highest amount raised in five years) plus 5% or 120% of goal (whichever is lower)

• APEX Award: Awarded to chapters which have set new record highs for their campaign for four of the past five consecutive years
PAOE Items – Dollar per Member

• Opportunity to earn big points with a higher Dollar per Member
  • 10 points per dollar per member for chapters who meet or exceed $50/member (and reach or exceed Goal)
  • 20 points for each dollar per member collected above the Society dollar per member goal of $75 (Option Two on PAOE worksheet)
Keep Track – The Spreadsheet and Reports

The Spreadsheet
• Compare YTD totals to LYTD totals
• Find percentage of Goal, High Five, and Challenge
• Ensure all PAOE points are being reported

Real Time Reports
• Find your donors to date
• Find LYBUNTs and SYBUNTs
• Track giving by chapter officers
Reports: A Quick Explanation

• Donor Detail
  • POV: Gift
    • Date, Fund, Chapter, Amount
  • When to Use
    • Track pledges being paid, quick recognition, ensure accuracy

• 10 Year History
  • POV: Donor
    • ID numbers, total giving, years given, home chapter, contact info
  • When to Use
    • Track past donors, Year End recognition
  • Home Chapter!
Organizational Items – Action Items

• What and when

• Ties into the Society solicitation calendar

• Ties into PAOE deadlines
Organizational Items – Summary Form

• How you send in checks or give donor names online
  • Ensures that the right donors receive proper credit
• Include donor name, amount to credit, and contributor ID (or address)
• Double check your math
  • Make sure the summary form and gift amount match!
Organizational Items – Campaign Order Form

• RP Promotional Items
  • Use as meeting pick-ups
  • Special Events bags/give-aways
  • Tie in to a chapter program
  • Gift to a major donor or special guest

• Reminder: There are 190 chapters
  • Please keep in mind that Headquarters has a limited supply of items
  • Only order one “big” give-away per event
You can do this with one hour a week, four weeks a month (or less)!

See page 61 for a quick guide.
The Ask

Before asking, thank the donor and mention what they did previously
  • Make the ask more personal and show you know about their giving history

Why do members give to the RP Campaign?
Why do companies give to the RP Campaign?
Questions?