

SOCIETY OFFICER CRC EVALUATION REPORT

Society Year	2023-24
Region(s)	Region II
Location (City)	London/Ontario
Host Chapter	London Canada Chapter
Dates	Aug 25, 26 & 27, 2023

SOCIETY OFFICER'S EVALUATION REPORT

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

A. General Attendance

1. Total CRC Attendance: : Presence of all 9 Chapters.
Total Attendance: 88 Attendees + 14 Companions = 102
some attendees also had family at the Oakwood Resort that did their own separate activities in the area
2. Accommodation:
 - a. The CRC was held at : The Oakwood Resort, London, Ontario
 - b. CRC activities were : The Oakwood Resort, London, Ontario
 - c. A Hospitality Suite was located : Yes and it was operational all evenings
3. CRC Preparation:

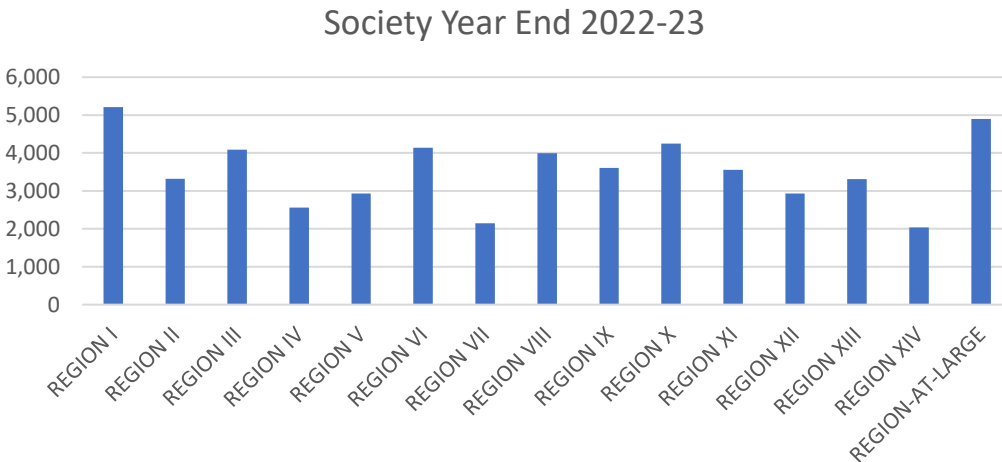
The CRC was managed as follows:

 - 1). CRC General Chair(s) : Tom Pollard, Ibrahim Semhat
 - 2). Region DRC : Ronald Gagnon, Montreal
 - 3). Region RMCR : Genevieve Lussier, Montreal
 - 4). Regional Nominating Member : Isabelle Lavoie, Montreal
4. Protocol:
 - a. Registration : A registration desk set at the Hotel and placed prominently adjacent to main Business room. Everyone was encouraged to pre-register
 - b. Visiting officer/staff recognition : Introduction was made for Officer/Staff
Ginger Scoggins, Society President
Ashish Rakheja, Society Vice President
Vanita Gupta, Staff
 - c. History Displays : Set-up in the Business Session room
5. Publicity options utilized to advertise the CRC include:
 - a. Regular emails from General Chair
 - b. Information on Region II website
 - c. Basecamp

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General Comments:

The CRC venue was well planned by London Chapter. Ron in his third year as DRC did a professional job in managing the activities. Tom Pollard frequent emails and updates provided a clear guidance to all attendees. The two General Chairs did a commendable job in managing hospitality and meetings/conference. The volunteers managing the registration desk included both General Chairs and local London Chapter members. There were adequate meeting rooms spread across the property.



B. Business Sessions and Caucus

1. Meeting Room Setup : Square shaped set-up
Delegate/Alternate and Regional Officers on Table
No virtual meeting facility
2. Attendance
 - a. Caucus : Held on Day-1 & 2. Reserve day on Day-3
Attendance of 9 chapters (out of total of 9)
 - b. Business Session 1 : Close to 30 participants
All Chapters participated.
Society Officer & Staff reports were given out
Chapter reports given out
Regional Officers Reports were presented
 - c. Business Session 2 : All the participants were present
Regional Officers Reports were presented
 - d. Business Session 3 : All the participants were present
Regional Officers Reports were presented

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3. Regional Planning Session : Held at CRC and attended by approx. 10 persons
Regional officers discussed on their challenges
Concern raised on low profile of ASHRAE in industry
4. Business Sessions : Held on Day 1, 2 & 3.
Chapter & Regional reports were presented
5. Caucus Sessions : Session held on Day-1 & 2 of Conference
Member, Isabelle Lavoie.
Alternate, Nicolas Lemire
There is no Reserve Alternate currently
6. Regional Officer Reports:
 - a. RMCR : Genevieve Lussier
Presented status of Motions from last year
Presented motions to be discussed on Day 1
Voting on motions took place on Day 3
4 Regional & 1 Society Motions.
 - b. Treasurer : Yves Trudel
(Tom Pollard did a review of chapter fund activity for 2002-2023)
Funds of \$ 45,000/- in Region
 - c. DRC : Ronald Gagnon
Provided an overview of Society & Region
 - d. Historical : Tom Pollard
A slide show prepared how ASHRAE was formed.
Montreal Highest PAOE points
Historical displays done
Chapter Anniversary dates maintained
 - e. CTTC & Refrigeration : Abhishek Khurana
Halifax Chapter been slow
Did 5 Allocated + 2 non allocated DL visits last year
12 Allocated DL visits this Society Year
Out of 366 Tech awards since 1999, Region II won 79
7 Tech Awards entered SY 2022-23
RVC visited 5 out of 9 Chapters
 - f. GAC. : Mike Genin
6 Chapters did better in PAOE points
6/9 GA Chairs are active
7 Chapters did work with provincial governments
Focus this year on Refrigerants & decarb

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- Setting up Regional GA Award
- g. Communications : Tom Pollard
Visit to 3 Chapters
Chapters use social media for events
Toronto Chapter had highest PAOE points for Region
8 Chapters above PAR
- h. Membership (MP) : Reaz Usmanali
Frank was earlier Chair who resigned in between.
All chapters did well except London & Halifax
Visit to 5 Chapters
Greater focus on DEI
Plan to establish WhatsApp chat with MP Chairs
600 members not paying area assigned dues
- i. Student Activities : Elizabeth Primeau
RVC did 5 Chapter visits
One new student branch at Toronto
French translation of Lucy Engineering book planned
Set up WhatsApp chat with SA Chairs
Student membership down to 300 from earlier 400 in 2022
- j. YEA : Ben Oliver
5 Chapters doing well. Toronto & Montreal are the best
10 attendees at YLW
Atleast 1-2 submissions being pursued for Decarb challenge
- k. RP : David Sinclair
7 out of 9 Chapters exceeded RP Goals
RVC did 6 Chapter visits
Windsor Chapter scored highest PAOE points
Utilize Basecamp to drive RP campaign
- l. Nominating Committee : Isabelle Lavoie
Accomplished tasks assigned, constructive discussion.
Delegate and alternate were prepared before meeting.
Candidates were well thought and qualified.
- m. Regional Audit : The Regional accounts are audited
- n. Chapter Audits :

Most of the Chapter accounts are audited yearly. There was a mention of financial audit in all Chapter reports.

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7. Chapter Reports:



Region II

2023 CRC



Halifax	
Delegate	Jarid Wilson
Alternate	Mike Mac Kenzie
	Hosted Build Green Atlantic 2023 with 370 attendees and Chapter made Can \$ 44000/-profit. Held a DEI event, Exceeded RP Goal, Last Financial Audit in 2021. Undertook collaborations with industry organizations. Chapter funds \$ 85,000/-
NB-PEI	
Delegate	Mike Boudreau
Alternate	Roch Couturier
	President has a 2 year term and no President elect. Celebrated 50 th anniversary, Annual Golf tournament with 93 attendees. Exceeded RP Goal, Chapter Bank balance \$ 58,000/- , Audit done this year, Using Eventbrite for event registration. Facing challenges in BOG attendance and new Board volunteers
Quebec	

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Delegate	Guy Breton
Alternate	Francois Guilemette
	Symposium held in May, Refrigeration night in Jan 2023, Over \$6000/- given out in Student scholarships, Exceeded RP Goal, \$95,000/- Chapter bank balance, Financial Audit done in 2023, Finding difficult to recruit new volunteers due to workforce shortage, Website improvement planned
Montreal	
Delegate	Mai Anh Dao
Alternate	Bruno
	Sustainability Seminar, 2 Career Fairs, WIA Happy Hour, Exceeded RP Goal, 308 Chapter dues paying members, \$ 1,43,000 Bank balance, Last Audit in 2022
Ottawa	
Delegate	Adrienne Mitani
Alternate	Evans Mutua
	Several under 25 persons on Board, HPB Standard Seminar, SMACNA Joint meeting, In person Career Fair, Ottawa Science fair Awards, \$ 1,22,000 bank balance, Audit planned this year, Planned 70 th anniversary celebrations, Surpassed RP Goal for the first time.
Toronto	
Delegate	Beatriz Salazar
Alternate	Alekhya
	Trash Dash-A Sustainability event, Collaboration with BOMA, 474 Chapter Chapter dues paying members, Exceeded RP Goals, Chapter Balance \$60,000/-, Last financial audit in 2021, put together a finance committee, lost administrative staff last year
Hamilton	
Delegate	Mitchell Rohrer
Alternate	Aaron Besseling
	34 years doing Golf Tournament, Did not meet RP Goals, 169 Chapter dues paying members, \$71,000/- Chapter funds, Last audit in 2022, Role emails introduced, challenges with not enough volunteers, meeting attendance inconsistent, De-carbonization focus this year
London	
Delegate	Jeff Armstrong
Alternate	Glenn Kernaghan
	Two Golf tournaments, Did not meet RP Goal, 87 Chapter dues paying members, Chapter Funds \$18,000/-, Audit done in Aug 2022, Averaging 25 members at meetings, Difficult to find members.
Windsor	
Delegate	Jamie Smith
Alternate	Syed Hassan
	WRSTEF Science Fair, Past President's night, Exceeded RP Goal, 39 Chapter Dues paying members, \$ 20,000 Chapter funds, Last Audit in March 2022, Facing difficulty in converting student members into full Members, Plan to establish one new Student Chapter.

General Comments:

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Ample time given to each Chapter for presentation. The set up was for CRC was done professionally with good audio & video facility. DRC managed the meeting well with good time management.

8. Workshops

Most of the workshops were done online in advance and hence attendance details are available for only 3 workshops.

Committee	Total Attendance	Chapters Represented		Chairs	
		#	%	#	%
Chapter Operation	13	9	100	9	100
MP	9	8	89	6	67
CTTC	12	9	100	9	100
GA	9	5	56	9	56
Historian + CC	7	6	67	6	67
SAC	10	8	89	8	89
RP	8	5	56	5	56
YEA	8	6	67	6	67

9. Technical Events:

One Technical Session held on Day 1

- Talk 1 : Doug Cocharane : Building EQ & ASHRAE HQ

One Technical Session held on Day 2

- Talk 2 : Badri Patel : VRF

10. Social Activities:

1. Welcome Party:

- a. Venue : Restaurant at the Hotel (Mexican Food) on Day 1
- b. Attendance : 100 plus
- c. Comments : Great team building (Treasure Hunt) event after dinner
Everyone moved to Hospitality Suite after the event

2. Award Luncheon:

- a. Venue : Conference room at Hotel (Spanish Food) on Day 2
- b. Attendance : 100 plus
- c. Comments : Awards given out by RVC, DRC, Society Guests
Good attendance and active participation

3. Dinner Event:

- a. Venue : Conference room at Hotel (Plated Food) on Day 2

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- b. Attendance : 100 plus
- c. Comments : Good social gathering and great networking.
Ginger delivered talk on her Presidential them

- 4. Companion Activities : Organized on Day 1 & 2 of the event

II. General Comments:

Well organized. There was good attendance of over 100 members at CRC. The social events and business meetings had complete involvement of local London chapter volunteers, Regional officers and Delegates/Alternates.

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

A. Did the CRC achieve its goals?

The CRC had attendance from all of 9 Chapters. The business was completed including officers training and networking between Chapter representatives.

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

1. Out of 366 Tech award since 1999, 79 Tech awards has come to Region II. This is the highest number in entire Society for a Region.
2. The Region approved a motion to introduce a Regional award for GAC.
3. Regional Chapter Statistics presented by Tom Pollard. It is a great way to get an overview of Chapter health and their growth.
4. The CRC is rotated between chapters and this provides opportunity to each Chapter to develop Leaders and involve their members.
5. Good time management. Entire business session was conducted in two & half days.
6. Good communication from General Chair about pre-CRC preparations.
7. The History book of the Region has pictures going back several years and the Chair Tom Pollard has done a great job in preserving the history.
8. Involvement of young members in the host team which is helpful in encouraging them to be engaged with ASHRAE and prepare future leadership.
9. There was a heathy mix of experienced and young volunteers at CRC.
10. Team building events were great ice breakers

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11. MP, SA & RP did a team building event of their own.
 12. Pre-determination of visitor meal preferences thru use google sheets was good.
- C. Area for improvement that next year's DRC and CRC Chair should pay additional attention?
1. Explore hybrid CRC and invite to general membership of Chapters to participate. Region may like to invest in Virtual platform and meeting set-up including hardware of its own.
 2. Copy of audited Chapter financial reports should be sent to Regional Treasurer by every Chapter for validation. A training for Treasurers may also be done at the CRC.
 3. The CRC venue should be access friendly.
 4. A theme based event during CRC will be good to have.
 5. AV & PA needs improvement.
- D. Other comments on CRC?
1. The next venues of CRC is Toronto. 2025 in Hamilton and 2026 in Moncton.
 2. The 2022 CRC made an estimated surplus of Can \$7,234.30 which was divided between Region II and host ASHRAE Ottawa Chapter
 3. Total of 22 motions came up during the CRC.
 4. Most Chapters have good financial reserves and the Golf tournaments are good source of revenue for every Chapter.
 5. Region voted to cover the Registration for the RVC's and DEI Regional chair and Accommodation for the RVC's.
 6. DRC managed the meeting well with active participation from RMCR.

Respectfully submitted,

Ashish Rakheja

Society Vice President 2023-24