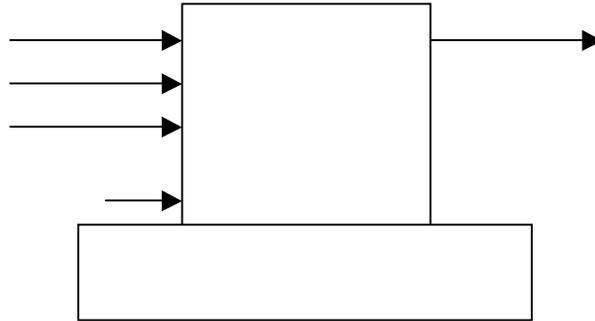# Section A

SUGGESTIONS FOR THE PRESIDENT

I. Chapter Management: A ΤΒΠ System


What engineering manual would be complete without a system flowchart? Actually, running a ΤΒΠ chapter is much like working with a linear system. This manual is full of transforms (though not attributable to M. Laplace) to help solve many of your administrative problems. If you have a question that is unanswered, **please always contact** Headquarters*:

> Tau Beta Pi
> P.O. Box 2697
> Knoxville, TN 37901-2697
> Telephone: 865/546-4578 or 800/828-2382
> FAX: 865/546-4579
> Email: tbp@tbp.org

Details on the major inputs to the system follow in this Section of the *President's Book*. Further suggestions are included in Sections B and C.

A chapter president should be in full accord philosophically with the ΤΒΠ idea. The president firmly believes that it is worthwhile *"to mark in a fitting manner those who have conferred honor upon their Alma Mater by distinguished scholarship and exemplary character . . . and to foster a spirit of liberal culture in engineering colleges."* He or she also believes that a group of engineering students with outstanding records, excellent character, and similar interests, as exists in a ΤΒΠ chapter, has a responsibility beyond that of average students. Within the limits of time and each student's obligation to do well in formal studies, the chapter president has a right to expect enthusiastic cooperation from fellow officers and members in carrying ΤΒΠ forward. This calls for leadership of a high order, and the president has been selected by his or her chapter members to provide such leadership.

PLANNING

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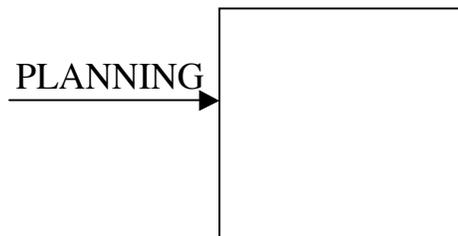
* Headquarters = national Headquarters = national office

A key to good leadership is **planning**. Hold a meeting of the Advisory Board early to map your goals and strategies for the upcoming year. This is the time to do a little zero-based budgeting of your traditional chapter projects, recognizing students no longer flock to your personal-computer course and that a social media seminar might be more appropriate.

Nothing breathes life into a chapter better than instituting a worthwhile activity to which your members feel justified in devoting their limited time. Thumb through the Index of Chapter Projects, listing more than 500 projects available from Headquarters, for ideas on activities. Your electees, engineering dean, and chapter Advisors, who are familiar with the needs of your college and community, may also offer suggestions.

Before embarking on a set of projects, examine your calendar and evaluate your financial and personnel resources.

Pages A-6a and b reveal a typical chapter schedule. You may need to alter them to conform to your school's calendar. Mark the sheets with information which pertains to your chapter.

Your chapter's budget doesn't have to be as elaborate as the federal budget. Unlike the federal government, your chapter should not plan for more expense than revenue.

Confer with your treasurer and Advisors on the budget frequently during your term. **You are responsible for your chapter** and this includes responsibility for financial matters. You should institute a procedure whereby your treasurer never spends without your approval.

The balance in your checkbook is a good upper bound on the money available, but how can you assess your available "manpower"? Try distributing a questionnaire at the first chapter meeting asking what skills (tutoring, peer-counseling, K-12 interests, etc.) your members may offer.

With this resource bank, you'll be able to make committee assignments. Dividing a large chapter into several small committees opens the gates for involvement and commitment from your members. It also supports the axiom that one can manage only seven-to-ten people.

Keep this ratio of one-to-seven in mind when you start thinking about doing some detail work. You and your committee chairs will be spending enough time offering guidance and following up to make sure the various tasks are performed so you should not worry about handling such chores as sealing envelopes. By delegating responsibility, chapter members become involved in ΤΒΠ which leads to the formation of a tighter-knit chapter.

PLANNING →
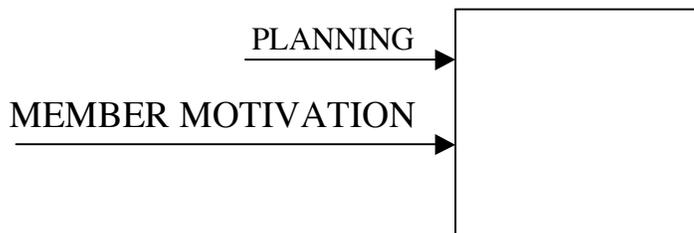
MEMBER MOTIVATION →

Your greatest challenge as president will be motivating your members. Unlike the business world, there is no strong legislative or line authority for requiring performance. Your members are your colleagues, so you must influence them to work with you, not for you.

Good communication is a key to obtaining commitments from your members. You will learn to fear the words, *"But I assumed that you wanted me to ...."* Prevent this by writing the details of your assignments and presenting them to your committee members. You are much more likely to get commitments when your members know exactly what is expected of them and realize that they won't be falling into a bottomless pit of responsibility. If you are reluctant to provide a piece of paper with a list of duties, remember that each of us, including you, only has a limited number of bytes of short-term memory under our hat. You will be doling out megabytes of tasks, so to help you in your follow-up, keep a list of what you've assigned to whom.

Select reasonable deadlines for completion of the assignments. Your volunteers will accept responsibilities more readily if given a two-week lead-time rather than two days.

Sometimes your members do have tests, homework, or lab reports, so it may not always be easy to squeeze in TBΠ activities. This applies to your meetings as well. Try to keep your meetings under 30 minutes in length. A well-planned agenda will not only keep the meeting moving, but will also stimulate attendance. The spirit of many chapters has been drowned by presidents who begin meetings with, *"Well folks, what do we talk about tonight?"* Apathy comes not from dull members, but from poor leaders.

Part of the meeting should be devoted to a summary of chapter activities. With everyone's attention focused on his or her own project, a student may not be aware of the work of fellow members. Members make much better TBΠ representatives when they are kept fully informed.

PLANNING
MEMBER MOTIVATION
RESOURCE UTILIZATION
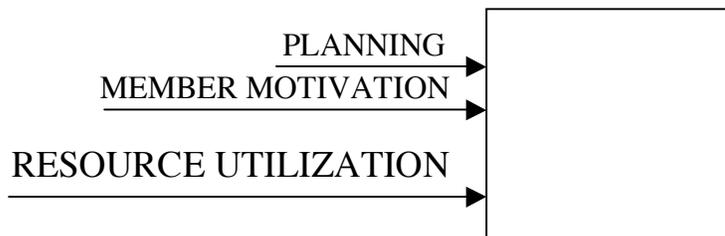
Use TBΠ documents and personnel. This *President's Book*, www.tbp.org, the *Information Book*, the Constitution and Bylaws, and your chapter bylaws will answer most questions about TBΠ. Pay particular attention to the requirements for the election and initiation of new members. One of our basic purposes is "to mark in a fitting manner."

To supplement these manuals you should have an outline of duties for each officer. A good basis for this is the material entitled "Duties of Officers" in Section C of this *President's Book*. The outline of duties serves two purposes.

One, it helps your officers understand their responsibilities, so that they don't have to "re-invent the wheel" each term. These guidelines are real time-savers when you and your people are embroiled in chapter matters and trying to improve your grades. Second, it helps you, the president, see that the various jobs are done because you are aware of the jobs that need doing.

We have a booklet online for your Advisors called "*The Advisor's Book*." Tau Beta Pi is a student-run organization, but the guidance you receive from these valuable resource people—your chapter Advisors—will make your job much easier.

Your Advisors usually have access to student records that you may not be able to lay your hands on when you need them most. Their service on initiation teams makes the presentation of the Ritual more impressive and, incidentally, also serves to maintain Advisors' interest in the chapter. They know which restaurants in town will provide the best banquet service; some Advisors have been known to provide their chapters with secretarial help; etc. As note the virtues of the alumnus Advisors, let's keep in mind that *members* is plural. If you have only one really interested Advisor, try to find three others!

Your District Director, a volunteer national officer in your region, has ideas for promoting activity within your chapter and with other chapters. Ways that your Director can aid you are included on page A-9.

The Headquarters staff is also ready to assist you. Tau Beta Pi's annual Chapter Survey report, which you will complete in the spring of your term, not only serves as the business-membership report to the national officers, but also helps you assess how close you've come to achieving your chapter's goals.

PLANNING

MEMBER MOTIVATION

RESOURCE UTILIZATION

EVALUATION
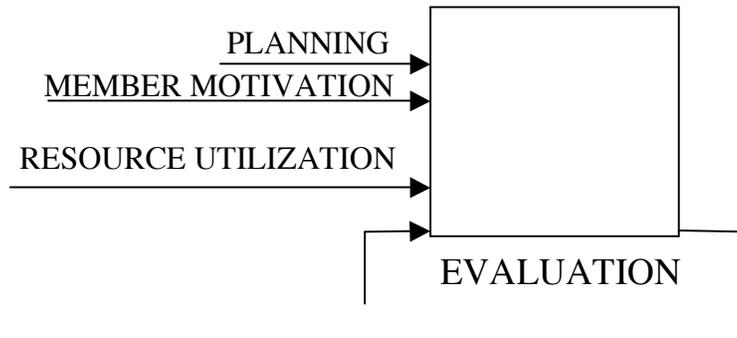
Feedback loops are just as important in chapter management as they are in circuit design. Your new officers should work with you in filling out the annual survey, because knowledge of chapter strengths and weaknesses serves as input to be fed back during their terms of office.

Your successors will be even more prepared to step into your shoes if you use the Chapter Officer Installation Procedure, described in Section C of this manual. Since the officer installation may be the only time all of the officers get together before the summer recess, it is a good time to complete the New Officers and Convention Credentials reports. The credentials is a two-part form, the bottom half of which is sent to Headquarters, while the upper half is kept by your chapter's delegate and carried to the annual Convention. Credentials, which are voter-validation certificates, are a requirement of the law under which ТВП is incorporated.

Remember the magic words "please" and "thank you." After a hat-full of "pleases" during the year to your members, give them a tip of the hat in the form of letters of appreciation at the end of the year.

There's a story about an elderly minister that summarizes the philosophy of being a chapter president. It seems that this minister, long past retirement, frequently was asked to preach in small communities that could not afford a full-time minister. One day he brought his young grandson with him. Arriving at the little country church, they noticed a box by the entrance labeled "Contributions for the Poor." The elderly minister, being a charitable man, placed the entire contents of his pocket in the box—25¢. After the sermon, an elder of the church informed the minister that it was the custom to give the contents of the box to visiting clergy. The elder shook the box, and out came its contents—25¢. The boy said, *"Grandpa, if you had put more into it, you would have gotten more out of it."* And that's the whole idea!

The more time you spend preparing to be an effective chapter president, the better the job you will do, and the more satisfaction you will derive from your term in office. Time spent during the summer is time saved for your academic work during the school year.

PLANNING
MEMBER MOTIVATION
RESOURCE UTILIZATION
EVALUATION
OUTSTANDING CHAPTER
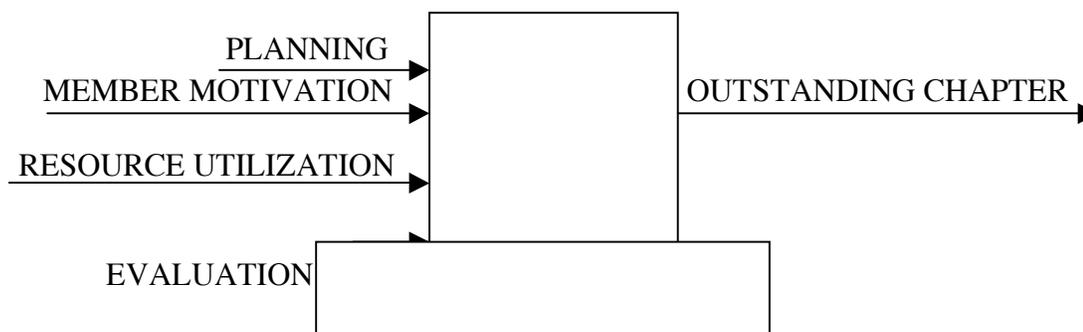
If you take the time to plan your chapter activities, communicate effectively, use your resources, and ease the transition for your successors, you will see a highly satisfying output branch sprout from your system.

Checklist of Chapter Reports & Fees

Report/Fee	Mailed to Chapters	Send to Headquarters	Reference
1. **Convention Expense Report*** (pdf file online)	August	2 weeks after Convention	Bylaw I, 1.06
2. **Officer Information Report*** (online)	August	October 15	B. V, 5.03(d)(1)
3. **Eligibility Report*** (undergraduate online)	September/January	As soon as eligibility list is available (within first 5 weeks of term)	B. VI, 6.05(a) B. VIII, 8.01(c)
4. **Election Report*** (Must be received/approved by Secretary-Treasurer **before initiation.**) (online)	September/January	As soon as electees accept (2 weeks before initiation)	B. VI, 6.05(b) B. VIII, 8.01(d)
5. **Catalog cards** (Orders keys/certificates; allow 4 weeks before initiation to receive keys/certificates.)	September/January	With Report of Election (Write legibly & accurately)	B. VI, 6.05(b) B. VIII, 8.01(d)
6. **Final Action Report*** & Roll Book Signatures (online)	September/January	One day after initiation	B. VI, 6.05(c) B. VII, 7.07
7. **Initiation Fees/Convention Assessments** ($32/$7 per initiate in 2008)	N/A (Statement to chapter treasurer will follow)	2 weeks after initiation	B. V, 5.03(e) B. I, 1.05
8. **Constitution Ratification Ballot*** (pdf file online)	October	April 1	Const. XVII, 3
9. **Report of New Officers*** (online)	(February reminder)	2 weeks after election	B. V, 5.01 B. VIII, 8.01(b)
10. **Convention Delegate Credentials*** (pdf file online)	February	2 weeks after election	B. V, 5.03(d)(5) B. VIII, 8.01(f)
11. **Chapter Survey*** (online)	March	June 1	B. V, 5.03(d)(9)
12. **Financial Report*** (online)	April	June 1	Convention Action
13. **IRS Form 990-N*** (online)	(January reminder)	Varies	B. V, 5.03(d)(7)

This list of required chapter reports is a guide for officers. Reports, online at *www.tbp.org*, are mailed to the president at the times specified. Those few listed as pdf files require signatures. If you need any assistance, call the Headquarters staff.

*These reports are available at *www.tbp.org/chapters* along with specifications for online submission of report Nos. 3, 4, and 6 for undergraduates only. A signature verification report is required for online electronic submission of chapter reports.

Rev.—Feb. 2011

II. Typical Chapter Schedule

	July	August	September	October	Nov./Dec.
Election and Initiation			•Compile list of eligible candidates, including graduate students, alumni, & eminent engineers. •Submit Report of Eligibility to HQ. (only undergraduate reports are online). •Outline election procedures at first meeting.	•Begin election procedures. Hold election meeting. •Hold first meeting of electees. Submit Report of Election & catalog cards to HQ. (Keys & certificates will be ordered from cards.) •**Receive initiation approval.**	•Practice Initiation. •Hold Initiation & banquet. •Submit Report of Final Action; send fees, & copy of roll book signatures to HQ.
Chapter Administration	•Review: *President's Book, Constitution & Bylaws,* Chapter bylaws, & *www.tbp.org.*	•Check inventory of supplies. Order needed items from HQ or *tbp.org.* •Check Advisory Board membership; request from HQ. •Hold Advisory Board meeting to plan Chapter year.	•Organize committees. State their responsibilities & goals. •Outline Chapter goals at first meeting.		
Convention	•Receive first letter about Convention.	•Receive Convention committee info. •Make travel plans online.	•Receive final letter of information.	•Attend Convention (bring credentials).	•Present report about Convention to the Chapter (from the minutes). •Vote on Constitution amendments passed by Convention (must have quorum).
Chapter Activities		•Participate in freshman & transfer-student orientation.	•Prepare MindSET K-12 proposal, no deadline.	•Plan Engineering Futures meeting; schedule online.	

Tau Beta Pi
National Deadlines: **Chapter Deadlines:**

Greater Int. in Gov't. grant proposal	None
Fellowship application	February 1
Scholarship application	March 1
Laureate nomination	April 1
Distinguished Alumnus nomination	April 1
Outstanding Advisor nomination	April 1
McDonald Mentor nomination	April 1
Executive Council Slate nomination	April 1, 2013
Chapter Survey	June 1
Convention Chair nomination	June 1
Convention bid	June 1

II. Typical Chapter Schedule

	January	February	March	April	May/June
Election and Initiation	•Compile list of eligible candidates including graduate students, alumni, & eminent engineers. •Submit Report of Eligibility to HQ.	•Begin election procedures. Hold Election meeting. •Hold first meeting of electees. Submit Report of Election & catalog cards to HQ. (Keys & certificates will be ordered from cards.) •**Receive initiation approval.**	•Practice Initiation. •Hold Initiation and banquet. •Submit Report of Final Action; send fees, & copy of roll book signatures to HQ.		
Chapter Administration	•Hold Advisory Board meeting.	•Elect new officers (& one advisor). •Submit Report of Election of New Officers (online).	•Install Chapter officers.		•Send to HQ: Conv. Credentials Financial Rpt. (online) Chapter Survey (online)
Convention		•Elect Convention delegate.			
Chapter Activities	•Prepare Laureate nomination, due 4/1. •Prepare Distinguished Alumnus nomination, due 2/1.	•Participate in Engineers' Week activities. •Prepare Outstanding Advisor nomination, due 4/1. •Prepare McDonald Mentor nomination, due 4/1.	•Host Engineering Futures meeting. •Prepare Greater Interest in Government proposal, no deadline.	•Attend District conference. •Hold spring picnic. •Take F.E. exam.	

III. Attributes of a Strong Chapter

While evaluating the procedures used to select outstanding chapters for consideration for national awards, the 1986 Convention Committee on Awards Review compiled the following attributes typical of any strong ΤΒΠ chapter. They are presented for your information and use.

1. Chapter Organization
   - effective communication
   - regular and meaningful meetings
   - effective delegation of tasks
   - achieving member participation and interactions
   - efficient use of manpower and resources
   - meaningful local chapter bylaws that list eligible curricula
2. Continuity
   - recruitment of future officers
   - conducts a meaningful installation of new officers
3. Strong Initiation Program
   - regular and sufficient means of election
   - standardized criteria for judging exemplary character
   - regular schedule of initiations
   - an excellent initiation, one which leaves a lasting impression
   - high acceptance rate of those elected and invited
4. Excellent Program of Projects recognizes changing needs of the community:
         (1) academic, (2) technical, (3) social, and (4) external
   - develops projects to meet those needs
   - uses creativity of members
   - achieves high member participation
5. Chapter Unity and Participation
   - effective officer-member communication
   - member and initiate interaction in projects
   - well defined member goals and objectives
   - formulation and implementation of action plans
   - evaluation of results
6. Image
   - conducts activities in a professional manner
   - publicizes activities of chapter
   - preserves the integrity of the Association
7. Association Participation
   - effective interaction with national officers
   - complete and timely reporting
   - representation at the national Convention
   - involvement in District activities
   - good relationship and communication with the District Directors and alumni
8. Advisory Board
   - assists with chapter continuity
   - lends an aura of respectability to the chapter
   - promotes relationships with faculty and dean
   - advises and makes suggestions to the chapter
   - assists in communication with industry
9. Corporate Relations
   - pursues constructive relationship with industry
   - promotes industrial awareness
10. Organized Financial Affairs
   - effective bookkeeping
   - punctual in payment of fees to Headquarters
   - operates in the black

IV. Information on Routine Headquarters Correspondence

Following is a list of all routine correspondence annually sent to the chapters from Headquarters and posted, using the election of new officers to begin the cycle. The 1988 Convention requested that this list be provided to all new chapter presidents.

Date	Addressee	Subject (& Due Date)
1. 2/1	President cc: Chief Advisor	• Convention Credentials (June 1) & Officer Election Report w/ Billing Information
2. Feb.	Advisor	• Convention Invitation
3. Mar.	President	•Annual Chapter Survey (June l)
4. Mar.	Advisor & cc: Pres.	•Chapter Survey & Evaluation (June l)
5. Apr.	President cc: Treasurer	•Financial Report (June 1)
6. 5/1, 6/1	Treasurer & cc: Pres.	• April 30/May 31 Account Statement
7. 7/1	Convention Attendees	• Convention First Letter
8. 8/1	Convention Delegates	• Convention Committee Assignment
9. Aug.	Convention Attendees	• Convention Final Letter • Chapter Development Program
10. Sept.	President	•Eligibility, Election, & Initiation Reports & Procedures • Informational Materials & Fall Candidate Packets
11. Sept.	President cc: Chief Adv.	•Fellowship (Feb. 1); Distinguished Alumnus (Feb. 1); Scholarship (Mar. 1); Laureate (4/1); Outstanding Advisor; & McDonald Mentor Award Programs (4/1)
12. Sept.	President	• Constitution & Bylaws Amendment Ratification
13. Sept.	Registrar	• Catalog Request
14. Oct.	Advisors cc: Pres. & Dean	• Appreciation & Information
15. Oct.	Treasurer cc: Pres. & Chief Adv.	• Sept. 30 Account Statement w/ Billing Information
16. Oct.	Pres. & Treas. cc: Chief Adv.	• Student Loan Program
17. Oct.	Convention Attendees	• Convention Minutes & President's Report posted, & Ratification Ballot (4/1)
18. Jan.	President	• Eligibility, Election, & Initiation Reports & Procedures • Informational/Display Materials
19. Feb.	President	• Laureate, McDonald Mentor, & Outstanding Advisor Award Nominations (4/1)
20. Feb.	Treasurer	• IRS Form 990-N

* Most reports and information are available at *www.tbp.org/Chapters*.

V. The District Program

Schemes for organizing ТВП 's chapters by districts had been suggested for many years before a specific plan was presented to the 1975 Convention. The plan was approved for a three-year trial and, following its success on an experimental basis, was formally adopted by the 1978 Convention. The need for districting was evident as the number of chapters increased and it became impossible for a few national officers to pay regular chapter visits. Your District Director(s), located close to a relatively small number of chapters, now supplies the frequent personal relationship that is a necessary ingredient for the health of the chapters in your area.

Under the plan the Executive Council assigned each collegiate and alumnus chapter to one of 16 geographical districts. More of your chapter's members than before are able to take part in ТВП affairs beyond your chapter, making them feel part of a truly national organization, rather than just an isolated local unit.

The focus of District programming is to strengthen the collegiate chapters and to enlist the aid of alumnus members in their work. Your District Director(s) will help you promote activities both within your own chapter and with nearby chapters. Consulting on chapter management problems, participating in chapter functions, setting up alumnus contacts, and stimulating your chapter Advisors are just a few of the ways your Director serves your chapter.

Following our national policy of having you, the students, govern yourselves, your District Director brings to your attention basic principles of running a voluntary membership organization. Your Director can offer suggestions on chapter projects, image enhancement, and the interpretation of the Constitution and Bylaws. Please keep in mind, however, that all chapter procedures and reporting related to membership eligibility, election, and initiation are under the direction and management of the Secretary-Treasurer. All membership reports must be sent directly to Headquarters, which is solely responsible for approving candidates for election and initiation.

Your District Director(s) will participate in your initiations and banquets, as schedules permit. The presence of a national officer in your ceremonies helps to leave a favorable impression of the national organization in the minds of your new members. He or she may suggest speakers for your banquets, may be willing to set up plant tours, speak at meetings, participate in seminars, and offer guidance for your members.

Inter-chapter activities also help to ensure the continuity of the chapters. The exchange of ideas between new, old, and potential officers occurs in regional meetings, Convention meetings, and through District emails.

District conferences in the spring bring together new and outgoing officers and Advisors for seminars, panel discussions and round-table workshops on ТВП matters. Business items of the Convention are considered also, so that the delegates to that meeting may become better prepared to offer their ideas. Convention time is available for delegates to meet by District to plan regional activities and to consider chapter administration problems.

Your District Director helps coordinate other activities among chapters, including active alumnus chapters, such as joint initiations and banquets, seminars, picnics, and softball games. Since space is limited in THE BENT (which prints all the news that fits), articles on all chapter projects cannot possibly be printed. District newsletters, however, provide the means of publicizing both the ongoing and the innovative activities of our chapters. Because of geographic and other constraints, your Director may not be involved in all the programs outlined above, but may undertake others.

Most Districts are fortunate to have more than one Director to help the chapters. Both you and your Advisors should feel free to call your Director(s) for ideas and assistance.

VI.   ROBERT'S RULES OF ORDER

PRINCIPAL RULES GOVERNING MOTIONS

Order of Precedence	Can interrupt speaker?	Requires a second?	Debatable?	Amendable?	Vote required?	Applies to what motions?	Motion can have what applied to it (in addition to withdraw)?	Can be renewed?	Rule Section
I. PRIVILEGED MOTIONS									
A. Fix the time to which to adjourn - (when privileged; only when another question pending).	No	Yes	No	Yes	Majority	None	Amend	Yes	16
B. Adjourn - (loses privilege if in any way qualified or if effect is to dissolve assembly).	No	Yes	No	No	Majority	None	None	Yes	17
C. Take a Recess - (privileged only when other business is pending.	No	Yes	No	Yes	Majority	None	Amend	Yes	18
D. Raise a Question of Privilege.	Yes	No	No	No	No vote	None	None	Yes	19
E. Call for the Orders of the day.	Yes	No	No	No	No vote	None	None	Yes	20
II. SUBSIDIARY MOTIONS									
F. Lay on the Table.	No	Yes	No	No	Majority	I-D, E, II-K, III, appeal	None	Yes	28
G. Previous Question.	No	Yes	No	No	2/3	Any debatable or amendable	None	Yes	29
H. Limit or Extend Limits of Debate.	No	Yes	No	Yes	2/3	Any debatable pending motion	Amend	Yes	30
I. Postpone to a certain time.	No	Yes	Yes	Yes	Majority	Main	Amend, limited debate	Yes	31
J. Commit or Refer.	No	Yes	Yes	Yes	Majority	No subsidiary motion	Limit debate, amend	Yes	32
K. Amend.	No	Yes	Not always, not when main motion not debatable	Yes	Majority	All but those that cannot be amended	Any	No	33
L. Postpone indefinitely.	No	Yes	Yes	No	Majority	Main	No subsidiary motion	No	34
III. MAIN MOTIONS									
M. General.	No	Yes	Yes	Yes	Majority	None	Any	No	
N. Take from Table.	Yes	Yes	No	No	Majority	Motion tabled	No subsidiary motion	Yes	35
O. Reconsider.	Yes, by one of majority	Yes	Yes, except when main motion not debatable	No	Majority	Specified	Limit debate, postpone definitely	No	36
P. Rescind, Repeal, or Annul.	No	Yes	Yes	No	Majority	All main	All subsidiary motions	No	37
Q. Renewal.	In general at another session								38
R. Ratify.	No	Yes	Yes	Yes	Majority	Approval of action	None	No	39
IV. INCIDENTAL MOTIONS									
S. Point of Order.	Yes	No	No	No	No vote	Any error	None	No	21
T. Appeal.	Yes	Yes	No	No	Majority or tie	Decision of chair	Yields to privileged motion & to motion to lay on table	No	21
U. Suspension of rules.	No	Yes	No	No	2/3	None	None	No	22
V. Object to consideration of question.	Yes	No	No	No	2/3 opposed to consideration	Any main	None	Yes	23
W. Division of a Question.	No	Yes	No	Yes	Majority	Main & amendments	None	No	24
X. Division of Assembly.	Yes	No	No	No	None	Voice or hand vote	None	No	25

—D.S.G.—