Section B

ELIGIBILITY RULES AND ELECTION AND INITIATION OF MEMBERS

Introduction

No chapter operation is more important than the election of new members. Elections fulfill our first purpose: “to mark in a fitting manner those who have conferred honor upon their Alma Mater by distinguished scholarship and exemplary character as students in engineering, or by their attainments as alumni in the field of engineering.” Chapter members should be encouraged to attend each initiation ceremony.

A person who meets TBII’s scholastic requirements has automatically earned the right to be considered for membership. Election, however, is by no means automatic. It is contingent upon the chapter’s evaluation of the candidate’s character; it is the chapter’s responsibility to measure each candidate against the Eligibility Code and then to either elect or reject on the basis of its evaluation.

The 1977 Convention amended Bylaw VI of the Association to give the chapters more freedom in the choice of procedures for electing new members to TBII. The amendments became effective January 1978 and made each chapter responsible to adopt its own election procedures, to have those procedures reviewed and approved by the Council, and to add them to the chapter’s bylaws.

Chapters may choose procedures for measuring the character of scholastically eligible candidates and may choose voting methods for holding elections suited to their own campus circumstances.

Specifically, Bylaw VI states: “A chapter shall have a procedure for the evaluation of the exemplary character of candidates as enunciated in the Eligibility Code of the Association;” and “Each chapter shall approve an election procedure consistent with its methods of measuring exemplary character.” These procedures must be approved by the Executive Council through the office of the Secretary-Treasurer and must be written into the chapter’s bylaws.

The procedure chosen by each chapter must accomplish three things. No short-cuts of these vital tasks are permitted:

1. It must determine the scholastic eligibility of students;
2. It must measure the character of the scholastically eligible students;
3. It must elect new members by a vote of the entire chapter membership.

Because of the significance of elections in an honor society, the Constitution and Bylaws sections covering elections require special study and attention. These rules and procedures should be followed to ensure fair and equal treatment of all candidates. This section of the President’s Book is designed to aid you in the conduct of elections and initiations. If you do not find the answers to your questions, please contact the Headquarters staff for assistance.
I. Schedule for Elections and Initiations

A. Begin work on determination of scholastically eligible juniors and seniors at the earliest possible date. As soon as school starts, appoint the Membership Committee and have it obtain the names of candidates from the dean’s or registrar’s office (see Bylaw VI, Sec. 6.01, and Part I of this Section). The committee should be composed of members from each engineering department, to minimize the possibility of overlooking anyone. If it is possible, compile the lists of eligible undergraduate candidates for the fall term during the summer—and for the winter or spring term, immediately after the fall term has ended. Note that weighting of grades is permitted—see page B-6 entitled “Determination of Eligibility.” Note the suggested schedule on page B-3.

B. Immediately after data have been compiled, the corresponding secretary should submit the REPORT OF ELIGIBILITY online to Headquarters (see B-22, Part VI—Reports to Headquarters for preparation of these reports).

C. Determine which method of measuring exemplary character your chapter uses. Your chapter probably already has an established and approved character-measurement procedure. TBI Bylaw VI, Sections 6.02 and 6.03, require that your procedure be contained in your chapter bylaws.

If your chapter does not have a procedure for measuring exemplary character, it will be your job to establish one. Part II-B (page B-10) describes several types of procedures that can be used. If one or more of these is not suitable you may devise your own procedure. The one you use, however, must be submitted to and approved by the Council. Then, you must include it in your chapter bylaws, and a copy should be added to this Section of the President’s Book for reference by future officers.

D. Proceed with your chapter’s method of measuring exemplary character.

(Place a copy of your exemplary-character measurement procedure behind this page, being sure that reference is made in the procedure to your chapter bylaw provisions on character measurement.)

E. Receive email acknowledgment of the REPORT OF ELIGIBILITY and judgment of the technical eligibility of graduate students, alumni, and eminent engineers from Headquarters. Reserve the initiation room.

F. Hold the election meeting. Your chapter is required to have “an election procedure consistent with its methods of measuring exemplary character.” (See Bylaw VI, Sec. 6.03(a)(1)). This procedure, like your chapter’s procedure for measuring exemplary character, must be approved by the Executive Council and contained in your chapter’s bylaws. Your chapter’s established procedure should be placed below.

(Place a copy of your election procedure behind this page, being sure that reference is made in the procedure to your chapter bylaw provisions on election.)

G. Preserve carefully all notes and records concerning each candidate until his or her last time of eligibility for election is passed.

H. Send a written notice of election to the local address of each elected candidate, and double-check that each is received. The notice should set a time and place for the first meeting of the electees and should provide alternatives for those who have other commitments at the time of the meeting. To avoid misunderstanding about the nature and purposes of TBI, the chapter may want to include a candidate packet with its letters. These packets, available free from Headquarters, consist of an introductory brochure, an electee brochure, a blank brochure for information about the local chapter, and a wallet to hold everything. Send a courteous letter of rejection to all candidates not elected who were aware they were being considered.
## The Tau Beta Pi Association

### Model 12-Week Initiation Schedule

<table>
<thead>
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<th>WEEK</th>
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| 1    | Request list of scholastically eligible students from school  
      | Choose dates & reserve rooms for all chapter functions |
| 2    | Submit Report of Eligibility; Order Electee Materials |
| 3    | Hold Orientation Meeting  
      | Receive Eligibility Acknowledgment from HQ |
| 4    | Conduct Character Evaluations  
      | Begin Candidate participation in projects |
| 5-7  | Continue candidate character evaluations |
| 8    | Hold Election Meeting  
      | Distribute Invitations to Electees  
      | Submit Report of Election and E-cards  
      | Mail catalog cards  
      | Follow up with non-respondents |
| 9    | Receive email Initiation Approval from HQ  
      | Call Headquarters if Approval has not arrived |
| 10   | Hold Electee meeting |
| 11   | Check Ritual and Initiation Equipment  
      | Choose and Notify Initiation Team  
      | Receive Keys and Certificates; sign certificates  
      | Hold Initiation Rehearsal |
| 12   | Hold Formal INITIATION Ceremony  
      | Submit Report of Final Action &  
      | Mail copy of Roll Book Signatures & Payment of Initiation Fees  
      | Mail Advisory Board Action on approved postponements |
I. Hold the first meeting of elected candidates at which the president or vice president should:

1. Answer any questions the electees may have, state the amount of the initiation fee, and explain what is covered by the fee. Important facts that should be reviewed with electees are listed on page B-29.

2. Ask electees who wish to accept election to do so in writing; if any electees refuse membership, you should ask them to state their reasons for refusing.

3. Give a set of electees’ materials and a copy of your chapter bylaws to each electee who accepts election. The materials (Constitution & Information Books) are ordered from Headquarters by requesting them on the Report of Eligibility.

4. Have each electee—including graduate students, alumni, and eminent engineers—complete two Catalog Cards. **EMPHASIZE TO THE ELECTEES THAT THE CATALOG CARD IS A PERMANENT RECORD. WE MUST HAVE FULL LEGAL NAMES (NO INITIALS) LEGIBLY PRINTED BY THE ELECTEES THEMSELVES, TO AVOID ERRORS IN SPELLING ON KEYS AND CERTIFICATES AND FOR ACCURATE MEMBERSHIP RECORDS.** No one other than the electee should ever fill out the Catalog Cards—others often make mistakes!

J. Immediately after you have collected the Catalog Cards from the electees who have accepted election, the corresponding secretary should submit the REPORT OF ELECTION and Electronic Card information online and **send one set of the paper cards to Headquarters to arrive two weeks before initiation.** (See Part VI for preparation of these reports.)

K. Receive email approval from Headquarters to initiate the electees listed on the REPORT OF ELECTION. **DO NOT INITIATE ANYONE WITHOUT SPECIFIC APPROVAL FROM THE HEADQUARTERS STAFF; IF NECESSARY, CALL HEADQUARTERS FOR APPROVAL.** (See Bylaw VIII, Sections 8.02 and 8.03.)

L. Keys and certificates should reach you within three or four weeks after Headquarters receives Catalog Cards and Report of Election. Orders are sent daily to our jeweler and our certificate engrosser. Completed orders are sent directly to you from the vendors.

M. Hold the initiation.

   The member who directs the initiation ceremony has an important job. Electees are initiated only once, and the ceremony is only as effective as the initiation team makes it. The ritual is designed to impress new members with the seriousness of purpose of TBP and, therefore, deserves serious preparation.

   Select the initiation team with care. You might ask your alumnus Advisors to serve. Their presence accomplishes two purposes: (1) it brings them into closer contact with the chapter and (2) serves to convey the importance of TBP to the new members.

   Distribute the parts well in advance of the initiation and conduct a dress rehearsal before the ceremony, if at all possible. Be sure that everything is ready and that everybody knows exactly what to do before proceeding with the initiation. It is extremely impressive when properly executed—remember that this is the one time to make the **proper** impression on new members. The ritual should be a meaningful introduction to TBP that unites the new members with those who have gone before them. A haphazard ceremony sets the tone for an apathetic group of new members. Please follow the instructions included with the ritual, rehearse the ceremony, and check all equipment.
You can have a major positive effect upon the image of TBJI by arranging a special program for non-member guests, concurrent with the ceremony, in a location near the initiation room. The program might include music, the Chapter CD-ROM available from Headquarters (10 minutes), and/or your chapter PowerPoint. An interested member should handle this responsibility.

N. Immediately after the initiation, the corresponding secretary should submit the REPORT OF FINAL ACTION online and send a photocopy of the Roll Book signatures to Headquarters (see Part VI for preparation of the report). The treasurer should send a check for the initiation fees and Convention assessments within two weeks (never send cash).

O. Receive email acknowledgment of receipt of the REPORT OF FINAL ACTION from Headquarters. Check the acknowledgment letter for agreement with your chapter records.

Note: Repeat the above procedure at the beginning of the winter or spring term. It is especially important to hold the election and initiation early, to ensure that the new members receive their keys and certificates before leaving school. ALLOW FOUR WEEKS FOR KEY DELIVERY IN THE SPRING.

References:

Membership reports must be completed online at www.tbp.org/tbpelig.

Report of Eligibility—Bylaw VI, Sec. 6.05(a)

Report of Election and Catalog Cards—B. VI, Sec. 6.05(b)

For important facts to review with electees before initiation, see page B-29.

Report of Final Action and copy of Roll Book signatures—B. VI, Sec. 6.05(c)

For explanation of initiation fee, see page C-4.
II. Determination of Eligibility

A. Scholastic Eligibility

1. For Undergraduate Students—see Const. Art. VIII, Sec. 2.
   a. Seniors—entire upper-fifth of the engineering class is eligible.
   b. Juniors—entire upper-eighth of the engineering class is eligible.

   Bylaw VI, Sec. 6.02, describes in detail how to determine who is in the top fifth and eighth of their respective classes. The initial list of the two groups will probably include absent co-op students, transfer students, and true sophomores or others who are not taking regular junior engineering courses but have enough credit hours to be mis-classified as engineering juniors by your institution.

   The procedures followed by your chapter should be clearly defined in your own chapter bylaws, which must list all eligible engineering curricula at your institution. For example, transfer students are typically ineligible until the third election after they transfer to your school (Const. Art. VIII, Sec. 2 (l) and (m)). Until the proper time, either (A) do not include them on the list of eligible students or else (B) leave them on and reject them on the Report of Election under Rejection Code C (candidate is not technically qualified because of transfer-student rule . . .).

   True sophomores and all others who are not taking junior engineering courses should be removed from the list of eligible juniors. True engineering juniors should be removed from the list of eligible seniors; their relative grade standing will determine whether or not they can be added to the list of eligible juniors.

   Postponed electees must be listed on reports only if they remain academically eligible. These eligible persons may be initiated at the next regular election without reelection.

Weighted Grades and Grades of Condition or Failure

   The use of weighted grade-point averages to emphasize grades earned beyond the first year of the college curriculum is permitted. (B-VI, 6.02(d).) This plan weighs all grades in the freshman year one, all sophomore grades two, etc. If one student’s grades are weighted to provide an advantage, then all grades in that class must be weighted for fairness to all candidates.

   No student should be unduly penalized for having received grades of condition, failure, or the equivalent. Those who still have conditions or failures on record are credited with no points and are charged with the number of hours for the subject(s). (See C-VIII, 2(n).) The important thing is that a candidate now possesses a scholastic record which places him or her in the upper fifth or eighth of the class.

2. For Graduate Students—see Const. Art. VIII, Sec. 3.
   Graduate students are eligible for election to membership under the provisions of C-VIII, Sec. 3. Eligible candidates must have completed 50% of all degree requirements and must stand in the top fifth of the graduate class or, if such class standing information is unavailable, a faculty member must certify that the graduate work is of the quality expected of a member of the Association, as stated in C-VIII, 3(1). The eligibility of a graduate student is thus based solely on documented graduate work in engineering at your institution. His or her TII class, engraved on the key and engrossed on the certificate, is the year in which the student will receive the graduate degree.

Rev.—October 2003
3. For Alumni—see Constitution Article VIII, Sections 4 and 5.

An **alumnus candidate** is defined to be a person who holds an engineering degree and who was or would have been eligible for election to TBP as an undergraduate or graduate student under one of the provisions of C-VIII, Sec. 2 or 3. An **eminent-engineer candidate** is defined to be a practicing engineer who has achieved distinction by professional attainments and who may hold many degrees or, rarely, none at all.

**Eligibility** for an **alumnus candidate** is based upon his or her scholastic performance as an undergraduate or graduate student; eligibility rules for alumnus candidates are given in C-VIII, 4 and 5. **Eligibility for an eminent-engineer candidate** is based upon his or her professional attainments over a period of at least ten years; eligibility rules for eminent-engineer candidates are given in C-VIII, 6. A candidate may be eligible as an alumnus or as an eminent engineer, depending upon the engineering degrees earned and the schools attended.

Both alumnus and eminent-engineer candidates must meet the general requirements set forth in C-VIII, 7. The information called for in C-VIII, 7(c), must be provided before the election of any such candidate can be approved by Headquarters. “Complete proofs,” as requested in C-VIII, 7(c), must include a list of colleges which the candidate has attended, the degrees earned, and the years in which they were granted, evidence that the candidate was eligible as an undergraduate or graduate student (for a candidate to be elected under C-VIII, 4 or 5), an outline of his or her professional record, and written approval of the chapter’s Advisory Board to elect him or her. **This information may be sent to Headquarters on the special reports to be used for these candidates (which are unavailable online).**

To avoid embarrassment to the chapter and to the candidate, the chapter should ask for a judgment of a candidate’s technical eligibility from Headquarters before electing him or her. Complete files of chapter reports since 1935 are maintained at Headquarters and may contain data of importance, if there were a chapter at the college when and from which the candidate received an engineering degree.

The outline below is to aid you in determining under which sections of Constitution Article VIII a candidate is eligible.

a. If the candidate were in the top fifth of his or her **undergraduate** or **graduate engineering class** (or top quarter for 1941 graduations and earlier):

(1) At a school which **did not have** a chapter of TBP when he or she attended:
   
   (a) Candidate is eligible under C-VIII, 4(a)(1), if he or she graduated from your college. Eligibility is based upon either undergraduate or graduate scholarship.
   
   (b) Candidate is eligible under C-VIII, 5(a)(1), if he or she graduated from another Tau Beta Pi chapter’s institution. Eligibility is based upon either undergraduate or graduate scholarship. A release is required from the “home chapter” per Sec. 5(b).

(2) At a school which **had a chapter** when he or she attended:

   (a) Candidate is eligible under C-VIII, 4(a)(2), 4(a)(3), 4(a)(4) or 4(a)(5), if he or she graduated from your college. Eligibility is based upon either undergraduate or graduate scholarship.

   (b) Candidate is eligible under C-VIII, 5(a)(2), 5(a)(3), 5(a)(4), or 5(a)(5), if he or she graduated from another Tau Beta Pi chapter’s institution. Eligibility is based upon either undergraduate or graduate scholarship.
b. If the candidate holds an undergraduate engineering degree from any recognized engineering school but was not in the upper fifth of the graduating class (upper quarter, 1941 graduations and earlier), he or she is now eligible under C-VIII, 6(a), if at least 10 years have passed since receiving an undergraduate engineering degree. Eligibility is based upon attainments as a practicing engineer.

c. If the candidate received an engineering graduate degree from a school which had a chapter of Tau Beta Pi and if he or she were eligible as a graduate student under the provisions of C-VIII, 3:

(1) Candidate is eligible under C-VIII, 4, if he or she received his or her graduate degree from your school. Eligibility is based upon graduate scholarship.

(2) Candidate is eligible under C-VIII, 5, if he or she received his or her graduate degree from another TBP chapter’s institution. Eligibility is based upon graduate scholarship. A release is required from the “home chapter” per Sec. 5(b).

4. For Eminent Engineers—see Constitution Article VIII, Section 6.

The eminent engineer eligibility provisions are to be used for candidates who do not qualify under any other Section of C-VIII because they were not scholastically eligible for membership as undergraduates or graduates and/or their rank in class cannot be determined.

a. Candidate is eligible under C-VIII, Sec. 6(a), if he or she earned a degree from a recognized engineering college more than 10 years ago; or if he or she earned a non-engineering degree more than 10 years ago, has since earned a graduate degree in engineering, and has achieved distinction in the field of engineering. Eligibility is based upon attainments as a practicing engineer; he or she is the type of professional person all undergraduates should strive to emulate. (See page B-9 and C-VIII, Sec. 7(a) and (b).)

b. Candidate is eligible under C-VIII, Sec. 6(b), if he or she does not hold a college degree of any kind or holds a degree in a non-engineering field but has had at least 15 years experience as a practicing engineer. Candidate must also fulfill the provisions of Sec. 7(a) and (b).

c. All elections under C-VIII, Sec. 6(a) or (b) must comply with the provisions of Sec. 7(c). It is most advisable to contact Headquarters concerning the eminent engineer’s technical eligibility for membership before the candidate is made aware of being considered for TBP election.

NOTE: The Tau Beta Pi class for a candidate elected under C-VIII, 4, 5, or 6(a), is the year of graduation with his or her first engineering degree. The TBP class for a candidate elected under C-VIII, 6(b), is the year of receipt of the undergraduate degree, or, if the candidate holds no degree of any kind, the class is the year of initiation.
5. Qualifications of Eminent Engineers

In response to requests from the collegiate chapters in 1988, the Council developed a set of interpretive guidelines to aid in evaluating an individual’s eminence as an engineer. Any candidate being considered for membership under these criteria should have achieved senior-level distinction in advance of his or her peers.

Five categories were defined as being important measures of qualifications, and they are listed below. Candidates would be expected to excel in at least one of the first two areas or to have an above-average mix in a combination of all of them.

1. Demonstrated evidence of creative and/or scholarly work:
   • Active in research, design, or multifaceted, large-scale engineering management
   • Publications in recognized refereed journals
   • Textbooks and monographs
   • Invited lectures at conferences and symposia
   • Citations by others of research results
   • Patents
   • Innovative designs or engineering management schemes

2. Excellence in the workplace:
   • Development of methodology/techniques
   • Recognition by peers with appropriate awards
   • Major projects/processes/products
   • Attainment of accomplishments common to senior status

3. Leadership/active in professional/technical organizations and/or honor societies:
   • Emphasis on sustained activities
   • Officer, director, or key committee person

4. Consultant:
   • Serve industry, government, and academe

5. Community service/leadership:
   • Church and civic organizations
   • Citizen boards and committees

Additional information on this subject can be found on pages B-7 and B-8 and in Constitution Article VIII, Sec. 6 and 7.
B. Evaluation of Character

TBII believes that a **person worthy of membership must exhibit two qualities — distinguished scholarship and exemplary character.** It is also fundamental in TBII that membership is gained by invitation of the chapter, **not by application of the candidate.** While the determination of distinguished scholarship is sometimes difficult under today’s conditions, it is assumed here that a list of the scholastically eligible candidates has been secured, checked, and verified under TBII’s rules. (See Section I-A). The vital task for the chapter is to judge the character of the eligible candidates before electing them and formally offering them membership. TBII believes that measurement of character is best done by one’s peers; and so the task of measuring character and voting on candidates for election is restricted to the active student members of a chapter. Faculty and other alumni may be invited to contribute to the character-measurement and election processes, and in some cases such input may be most desirable (as in get-acquainted meetings and departmental interviews and caucuses), but the final decision on offering membership is at the discretion of the student members.

This means that the student members must know the eligible candidates personally, or they must devise a procedure by which they may obtain enough information about the unknown candidates to cast intelligent votes on them.

Two approaches have been used. The first is based on the belief that a candidate’s character should be evaluated without his or her knowledge. Chapters using this approach have relied on the opinions of those chapter members who know a particular candidate and can testify to his or her character. In small schools this procedure has long worked satisfactorily.

In large schools, or in commuter schools, some eligible candidates are unknown to any chapter member, and other means of character evaluation are called for. This leads to the second approach that consists of obtaining information directly from the candidate. Chapters using this method hold receptions to which candidates are invited, or they invite candidates to submit written résumés of their extracurricular activities, or they conduct interviews of the candidates.

Care must be taken not to place a candidate in the role of supplicant because each scholastically eligible candidate has earned the right to consideration for membership. It is the chapter’s responsibility to measure the candidate’s character, not the candidate’s responsibility to plead his or her worthiness.

Statements on the evaluation of character with sample character-evaluation procedures are presented in this section. These sample procedures are designed to fit chapters of varying size—small, medium, and large—because the 1977 Convention Committee on Election Procedures and Character Measurement found that size of chapter (or, rather, number of eligible candidates) is probably the most important factor in the choice of a proper election procedure.

**Sample Procedures**

Six basic unit procedures are described by examples below. While some chapters may use only one unit, other chapters may find it desirable to use a combination of one or more units. Chapters are not restricted to using these procedures and may design others specific to the chapter’s needs. **All procedures (including those enumerated here) must be approved by the Executive Council before being put to use in the chapter.** The exact procedure that your chapter uses, once approved, must be included in your chapter’s bylaws (see Bylaw VI, Sec. 6.03) to ensure that future chapter officers will conduct elections properly. Sample bylaw wordings are presented in Section VII. Any changes in your chapter’s approved procedures should be approved by the Executive Council and reflected in revisions to your chapter bylaws.
1. TRADITIONAL PROCEDURE

Application: Small chapters

Summary: Candidates are discussed at a pre-election meeting. Faculty recommendations are secured, and active members investigate unfamiliar candidates.

Procedure:

a. Secure faculty recommendations on candidates. Generally a list is sent to faculty members with a request that candidates who lack exemplary character be identified. Another approach is to ask candidates to secure recommendations from their professors.

b. Hold a pre-election meeting. A list of candidates is given to the active membership. At this meeting, there shall be an informal discussion of the eligible students.

c. Chapter members conduct individual investigations on those candidates who are not well known. There are several methods of learning about unknown candidates. The candidate could be interviewed or faculty members can be consulted.

Assessment:

a. This method generally works best for small chapters at small schools where most students know each other. Many chapters have combined this procedure with others, particularly the project or activity participation procedure.

b. Many chapters find it difficult to secure faculty recommendations because of the faculty’s unwillingness to cooperate; however, this can provide an excellent opportunity to gain faculty input and generate their interest in chapter operations.

2. GET-ACQUAINTED MEETING PROCEDURE

Application: Medium and large chapters

Summary: The scholastically eligible candidates are invited to a mixer, reception, or get-acquainted meeting along with the chapter and alumnus members. At the meeting, arrange for the social mixing of candidates and members so that members get to know the candidates. Character evaluations are made by the members based on the impressions obtained at the meeting.

Procedure:

a. Invitation letters are sent out to each scholastically eligible candidate. The letter congratulates the candidate on his or her academic performance, invites the candidate to the get-acquainted meeting, and gives a general overview of the purpose and activities of TBPI. A good idea is to enclose the introductory brochure for additional information.

b. Hold a get-acquainted meeting. At the meeting, give out information about TBPI both on a national and local level. Then the formal part of the meeting is ended, and the candidates are encouraged to socialize with the chapter members. They should meet and talk to as many members as possible. Members should be instructed to learn as much as possible about the candidates and to answer any questions the candidates may have about the Association. Refreshments are generally served at the meeting.

c. Evaluate candidates. The members are asked to evaluate either in written form or by group discussion the candidates they met at the meeting.


Assessment:

a. This procedure is rarely used alone. It is frequently combined with the résumé and interview procedures.

b. At the meeting, it is sometimes desirable to break up into departmental groups where the candidates may know or at least have seen most of the members in the group.

c. Scheduling the meeting at a time when everyone can attend is difficult or impossible, especially in large chapters.

d. Small chapters have also found this to be a useful part of their evaluation process.

3. INTERVIEW PROCEDURE

Application: Medium and large chapters

Summary: Scholastically eligible candidates are asked to participate in a personal interview with active chapter members and sometimes faculty Advisors. Interviewers make recommendations on candidates to the active chapter members. Character evaluations are made based on the recommendations of the interviewers.

Procedure:

a. Appoint an interview committee of active chapter members. The number of committee members depends on the size of the chapter and the number of candidates to be interviewed; committees generally have from two-to-five active members and sometimes include a faculty Advisor. More than one group of interviewers can be selected when there is a large number of candidates.

b. Invite all candidates to attend a personal interview. This can be accomplished in any number of ways. Candidates can be sent letters with assigned times for interviews or with a list of available interview times and a request that they turn in their preference to the interview committee. Some chapters prefer to hold a reception with actives and candidates and have the candidates sign up at that time for an interview. Other chapters require candidates to complete résumés or biographical data sheets and return them to the interview committee, at which time candidates sign up for interviews.

c. Conduct interviews. The length of time per interview depends on the number of interviewers and the number of candidates; interviews can last from 10-30 minutes. Some chapters have candidates complete résumés prior to interviews, which provide the interviewers a basis for questions. Other chapters use an interviewer question sheet (with a list of questions that should be asked of candidates), which is given to all interviewers prior to interviews.

While many chapters will have a particular committee interview only one candidate at a time, some chapters prefer to conduct interviews with small groups of candidates, e.g., three or four at a time.

d. Evaluate candidates. The members of the interview committees are asked to submit evaluations of the candidates in either written form or by oral presentations at the election meeting.
Assessment:

a. This procedure is generally not used alone. It is frequently combined with the résumé and/or get-acquainted meeting procedure. Sometimes the interview committee is set up according to academic department, which is similar to the departmental caucus procedure.

b. It is difficult to arrange interview times so that meeting is convenient for all concerned. While evening or weekend interview times are undesirable, they may be necessary to avoid class conflicts.

c. Conducting interviews sometimes gives TBII a snobbish reputation. The interviews should be somewhat informal, and extreme care must be taken to avoid placing the candidates in the role of supplicant.

d. While interviewing is probably the most difficult character-measurement procedure to employ, it is probably the best means of evaluating character.

4. DEPARTMENTAL CAUCUS PROCEDURE

Application: Medium or large chapters

Summary: Meetings are held by department (caucus). Department caucus considers all candidates from the department and formulates a recommendation on each candidate for chapter consideration. Investigations are conducted for candidates who may not be well-known by the caucus, as necessary. Character evaluations are made based on the recommendations of the caucus.

Procedure:

a. Organize departmental caucus. The caucus may consist of all of the members in the departments or in larger departments a representative group of members from that department is chosen. Sometimes it is necessary to combine two or more departments into one caucus. Each caucus should be headed by a chairperson and secretary.

b. Consider candidates. Each department caucus considers all candidates from the department(s) represented in the caucus. The caucus should conduct an investigation of all candidates who are not well-known by members of the caucus.

c. Evaluate candidates. The members of the caucus will vote on each of the candidates in their department(s). This caucus recommendation is used by the chapter at the election meeting.

Assessment:

a. This procedure can work well in medium-size chapters where each department is relatively small. In larger chapters this procedure is sometimes combined with the résumé and/or get-acquainted meeting procedure.

b. Departmental caucus is an excellent way to organize a candidate interview procedure.

c. There is sometimes a tendency for candidates to be recommended simply because they are known by the caucus and not because of any qualities (good or bad) that they may possess.

d. The caucus format provides an excellent opportunity for faculty-alumnus member input.
5. RÉSUMÉ PROCEDURE

*Application:* Medium and large chapters

*Summary:* The scholastically eligible candidates are invited to submit résumés of their non-academic activities and interests. The membership committee reviews all résumés and formulates a recommendation on each candidate for chapter consideration.

*Procedure:*

a. Letters are sent out to each scholastically eligible candidate. The letter congratulates the candidate on his or her academic performance, invites the candidate to complete a résumé form, and provides a general overview of the purpose and activities of TBII. It is also a good idea to enclose the introductory brochure for additional information.

b. The membership committee will review all of the résumés and formulate a recommendation on each of the candidates based on the résumés.

c. The chapter evaluation of the candidates is based on the membership committee’s recommendation and any personal knowledge members may have of the candidates.

*Assessment:*

a. This procedure is very easily incorporated as a part of any of the other procedures, or it can work well alone.

b. The résumé form, if thoughtfully planned, can be an excellent source of information about the candidate.

c. In place of or in addition to a résumé, some chapters require the candidates to write an essay on some pertinent topic in furtherance of TBII’s *liberal culture* objective. (Bylaw VII, Section 7.01)

d. The résumé itself can be used to *weed out* candidates whose interest is minimal.

e. Small chapters also find this procedure effective.

6. PROJECT OR ACTIVITY PARTICIPATION PROCEDURE

*Application:* Any size chapter

*Summary:* Character is evaluated based on a candidate’s participation or lack of participation in a required project or activity. Duties can range from participation in a chapter project, service on a committee, or polishing a Bent, to completing an electee exam.

*Procedure:*

a. Make project or activity assignments. There are a number of ways to accomplish this task. Some chapters prefer not to give candidates a choice of activities and will simply inform them by mail or at a meeting of the requirements. Other chapters give their candidates a choice of a variety of projects or tasks to perform. This also can be done by mail or at a meeting. The chapter can send a project sign-up sheet along with their letter of invitation and request that it be returned to the person in charge of candidates. The assignments can then be made by mail or at a meeting.
b. Monitor candidates’ project activity. This can also be done in a number of ways depending on the type of activity assigned. Participation in chapter projects or on committees can be monitored by the project coordinator or committee chairperson who is generally an active member and/or by requiring the candidate to submit a report of work completed. Other types of electee activities are easier to monitor. Writing essays, taking exams, polishing Bents, or collecting signatures are all activities that are easily monitored by their final products.

c. Evaluation of candidates. Committee or project chairpersons are asked to evaluate candidates in written form or by an oral presentation at the election meeting. For other types of activities, a committee should be appointed to make evaluations based on the candidate’s finished product.

Assessment:

a. This method of character evaluation is rarely used by itself, but is frequently used in conjunction with any of the other procedures.

b. Many chapters choose to elect candidates based on some other procedure, then require the electees to perform duties. This serves as a good check on the initial evaluation.

c. There is generally more cooperation on the part of candidates if the activities are meaningful and if they have a choice of projects.

d. This procedure provides good manpower for completing chapter projects.

7. COMBINATIONS, PERMUTATIONS, EXTRACTIONS, EXTRAPOLATIONS, AND EMBELLISHMENTS OF NOs. 1-6, AS THE CHAPTER MAY CHOOSE.
III. Election Procedure

Note: Some chapters have had problems meeting the quorum requirements for conducting meetings, especially important meetings where membership elections are to be held. If a chapter finds it extremely difficult to obtain a quorum, it may implement Bylaw VI, Sec. 6.06(b), which permits its Advisory Board to declare absent members inactive, thus reducing the number of members required for a quorum.

Inactive members are excluded only from those rights and privileges that the Constitution and Bylaws specify for active members. The rights and privileges limited to active members are:

- Convention delegate: B-I, 1.04 and B-V, 5.05(a)
- Fines: B-VIII, 8.01(a)
- Inactive status: B-VI, 6.06(a), (b), (c)
- Officers: C-VI, 6
- Quorum: B-V, 5.07
- Voting: C-VIII, l(c); 2(b), (c), (d), (e); 4(a)(4); 5(a)(4); 11
  C-IX, 5(a)
  C-XVII, 2(a), (b)
  B-V, 5.04(a)
  B-VI, 6.03(b)(1)

However, a long-term solution to the quorum problem will involve a more careful selection of members and a review of chapter operations.

Bylaw VI, Sec. 6.03, requires that each chapter “approve an election procedure consistent with its methods of measuring exemplary character.” This Bylaw allows a chapter to select an election procedure, i.e., voting procedure, of its own provided it takes into account the character of each eligible candidate and provides for full-chapter voting on the candidates.

Election to membership in TBI remains an explicit act taken by deliberate chapter action. Election is not accomplished by “automatic” means by lack-of-objection assumptions or by default of chapter action.

There are two approved methods for voting on candidates: (1) The traditional procedure, where candidates are discussed and voted on individually and (2) the bloc-voting procedure where candidates are voted on in groups. When using the bloc-voting procedure Bylaw VI, Section 6.03(a), specifically states that the candidates must be considered “individually at some point in (the) character measurement process.”

Statements on election procedures with two sample methods are presented below. These sample procedures are designed to fit both small and large chapters.
Sample Procedures for Election

Applicable to all chapter election meetings: At least three-fourths of the active members of the chapter must be present to constitute a quorum. All groups or individuals must be elected by at least a three-fourths affirmative vote of the active members present and voting affirmatively or negatively, so long as the affirmative vote is a majority of the total active membership of the chapter.

A. Traditional Procedure (for small chapters):

At the election meeting the candidates are discussed and voted on individually in the order of their scholastic rank in class, top student first, all seniors, then juniors. Voting in order of class rank is the traditional method; however, other orders may be used.

After all candidates have been considered and voted on there shall be a second individual ballot taken in the same order for each candidate who failed election on the first ballot. No candidate who fails election on the second ballot shall be considered further unless 25% or more of the voting members present so request. No candidate who fails election on the third ballot shall be considered again at this election.

B. Group or Bloc-Voting Procedure (for large chapters):

At the election meeting the character-evaluation reports of the interview committees, departmental caucuses, résumé screening committees, or project evaluation committees are given to the chapter.

Active members are to be given the opportunity to remove or purge one or more candidates from a group or bloc so that they can be discussed and voted on individually. Purging may result merely from some members who want more data on a candidate, not necessarily from the intention of voting against the candidate.

Conduct the vote on the groups or blocs.

Conduct a first ballot on each of the purged candidates, seniors first, then juniors, allowing for discussion as desired.

Conduct a second ballot on the purged candidates who failed to be elected on the first ballot.

A third ballot is to be taken on candidates failing election on the second ballot only if 25% or more of the voting members present so request. No candidate who fails election on the third ballot shall be considered again at this election.

Rev.—November 1979
IV. Refusals of Election

When an elected candidate refuses election an effort should be made to discover the reasons; Bylaw VI, Sec. 6.05(c), requires reasons for refusal to be reported to Headquarters on the Report of Final Action. There are but two reasons for refusal: (1) lack of interest, and (2) financial.

Lack-of-interest refusals do arise from misunderstandings as to the type of organization candidates are being asked to join, and are often corrected in a personal conference. At other times, electees refuse to accept membership because they feel that TBII is not “relevant” and that the chapter has not shown any constructive justification for its existence. A lack-of-interest refusal cancels the election of the candidate. The candidate would then have to remain eligible and be elected again before being initiated. Chapter presidents should make every effort to ensure that chapter projects are worthwhile, relevant, and constructive and that no electee is required to perform menial tasks which tend to degrade him or her.

No electee should be prevented from becoming a member of Tau Beta Pi because of inability to pay the initiation fee. Note that C-VIII, 10(a), requires that the chapter’s Advisory Board be notified of all cases of financial refusal and that the Board interview electees to determine if their refusals were solely for financial reasons. If the Board determines the reasons to be financial, then C-VIII, 10(b), requires the chapter to review each electee’s case within five years and to report its action to the Secretary-Treasurer. The Secretary-Treasurer will periodically remind the chapter of such pending cases.

Many chapters endeavor to assist students who decline for financial reasons with chapter loans or through the TBII Student Loan Fund. In all cases where financial assistance is rendered by the chapter it should be done in a business-like manner by the signing of proper notes payable at definite dates. An alumnus member of the Advisory Board should handle this type of transaction and serve as custodian of any long-term notes.

Since electees are not members of TBII, they are not eligible to receive loans from the national Student Loan Fund. However, a procedure used by many chapters is permissible: the electee signs a short-term note to the chapter for the initiation fee, the chapter initiates the person routinely, and he or she immediately applies to the Student Loan Fund for money to repay the short-term debt to the chapter. The new member signs a promissory note payable to the national organization and has up to three years to repay the debt.

Information about the Student Loan Program is on page C-27.
V. Electees to be Initiated by Other Chapters

A. Procedure for the Home Chapter

Here is the TBPI procedure for arranging the initiation of an electee of your chapter by another chapter near the electee’s home. This is done when the person cannot return to your chapter for formal initiation. This electee will be a member of your chapter.

1. Establish candidate’s eligibility in accordance with Tau Beta Pi membership rules and secure approval for election from Headquarters, based on candidate’s qualifications under Constitution Article VIII.

2. Notify candidate by mail of election and include a TBPI introductory brochure.
   a. Do not contact any chapter in electee’s behalf.
   b. Tell electee not to contact any other chapter concerning initiation.
   c. Tell electee to wait and hear directly from Headquarters.
   d. Receive acceptance of election from electee.
   e. Tell electee the amount of your chapter’s initiation fee and to whom it should be sent. (It is your responsibility to collect the initiation fee; the initiating chapter will not collect any money from the initiate.)

3. Report election either by letter or Report of Election to Headquarters. Include:
   a. Full name of electee,
   b. Class year—year of electee’s first engineering degree, and
   c. Mailing address of electee.

4. Headquarters will contact the electee and will arrange direct communications with the president of the nearest chapter. Copies of the letter will be sent to both you and the initiating chapter.

5. When electee responds favorably to the first letter, Headquarters will approve initiation by sending an official Initiation Approval letter to the president of the initiating chapter (with a blank initiation report, two catalog cards, and a signature slip).
   a. Copy of official Initiation Approval will be sent to you. (You should now check with your chapter treasurer to ascertain that the electee has paid the initiation fee. If not, your treasurer should write and request payment.)
   b. Copy of official Initiation Approval will be sent to electee to advise that arrangements are complete.

6. After initiation, the president of the initiating chapter will send to Headquarters:
   a. Report of Initiation for your new member,
   b. Two completed catalog cards, and
   c. Signature slip.

7. Headquarters staff will complete all chapter membership records:
   a. Final letter will be sent to new member.
   b. Copy of final letter will be sent to initiating chapter.
   c. Copy of final letter will be sent to you along with:
      (1) One catalog card for your chapter files, and
      (2) Signature slip—cut your new member’s signature from slip and paste into your chapter roll book.

Rev.—January 2002
8. Headquarters will:
   a. Charge new member’s national initiation fee to your chapter account,
   b. Order engraved key and membership certificate for new member, and
   c. Start the four-year BENT subscription.

B. Procedure for the Initiating Chapter

When your chapter is asked to initiate an electee for another chapter:

1. You will receive a copy of our first letter to the electee.
   a. Electee should contact you requesting details of your chapter’s next initiation ceremony: 1) Date, 2) Time of ceremony, 3) Place ceremony will be held, and 4) Initiation banquet details.
   b. If details are unknown, make arrangements to inform the electee later to provide date, time, and location.
   c. If you do not hear from the electee and the time of your chapter’s initiation is near, it would be kind of you to invite him or her to attend.

2. When you know that the electee plans to be initiated, please write to Headquarters or instruct the electee to notify Headquarters of his/her intentions. The staff will send an official Initiation Approval to you along with:
   a. Blank initiation report,
   b. Two catalog cards, and
   c. Signature slip.

   NOTE: Do not collect any money from the electee. He or she will have paid the regular initiation fee covering chapter charges and initiation banquet (see 3-b below) to the home chapter. The home chapter will be billed for the national fee. The electee should pay you for the meal of any guest.

3. Initiate the electee, who must complete both catalog cards and sign the signature slip.
   a. Send the completed Initiation Report, both catalog cards, and the signature slip to Headquarters.
   b. If the new initiate attended your chapter’s banquet, tell the national Headquarters the amount you paid for the dinner so that your chapter’s account can be credited and the home chapter’s account can be charged.

4. You will receive a copy of a letter to the person you initiated, thanking you for assisting another chapter.
THE TAU BETA PI ASSOCIATION
POSTPONED AND FINANCIAL REFUSAL ELECTEES

Tennessee Omega     Spring 2011

The persons listed below were elected by your chapter during past initiation seasons as noted. They have refused membership for financial reasons (Const. Article VIII, Sec. 10), or have simply missed attending a formal initiation. Unless their election is to be cancelled, at the option of your chapter, the following three options apply:

A) Persons whose names appear on this list and who remain eligible for membership may be initiated at the next regular initiation without re-election. Such electees who graduate may be initiated without re-election within five years from the date of election.

B) Persons listed who become academically ineligible and whose postponements have been approved and documented by the Advisory Board may be initiated at the next regular initiation.

C) Persons listed who become ineligible and whose postponements the Advisory Board has not approved, must become eligible again and be re-elected during a subsequent term in order to be initiated.

If it is inconvenient for them to return to your chapter for initiation, arrangements can be made through Headquarters for their initiation by chapters near their homes. (See B-19-20)

Please indicate the action to be taken on each electee listed: i.e., to be initiated on_______________________(date); election cancelled by the chapter; continue financial refusal or postponed status; etc.

RETURN THIS SHEET WITH YOUR REPORT OF ELECTION

<table>
<thead>
<tr>
<th>Name &amp; Class</th>
<th>Advisory State/Date Elected</th>
<th>Board Approval</th>
<th>RE: Key</th>
<th>Action by Chapter</th>
</tr>
</thead>
<tbody>
<tr>
<td>S.A. Bosworth, ’10</td>
<td>Financial Refusal Fall 2009</td>
<td>N/A</td>
<td>HQ has key</td>
<td>________</td>
</tr>
<tr>
<td>G.R. Jones, ’11</td>
<td>Postponed Fall 2010</td>
<td>APPROVED</td>
<td>Chapter has</td>
<td>________</td>
</tr>
<tr>
<td>*M.M. Mitchell, ’12</td>
<td>Postponed Fall 2010</td>
<td>Not ordered</td>
<td></td>
<td>________</td>
</tr>
<tr>
<td>L.M. Noack, ’11</td>
<td>Postponed Fall 2010</td>
<td>APPROVED</td>
<td>Chapter has</td>
<td>________</td>
</tr>
</tbody>
</table>

*If initiated, HQ needs a catalog card.

(Mailed to chapters in September and January)

If HQ has possession of the key for any person to be initiated, it will be returned to you. A new membership certificate will be ordered.
VI. Reports to Headquarters

This section is designed to help you prepare your reports to Headquarters as required by Bylaw VI, Sec. 6.05. Following are examples of the Reports of Eligibility, Election, and Final Action for undergraduates only and for graduate-student, alumnus, and eminent-engineer candidates. Also included are instructions. All undergraduate reports must be submitted electronically online at www.tbp.org/tbpelig.

A. FOR UNDERGRADUATE STUDENTS ONLY.

1. Report of Eligibility (submit online)

   Immediately after data on scholastic eligibility of juniors and seniors have been compiled, the corresponding secretary should submit the REPORT OF ELIGIBILITY to Headquarters, prepared as follows:

   a. List entire upper-fifth of the senior class and entire upper-eighth of the junior class, even if some names are below the chapter’s grade-point-average cut-off. Be sure to indicate such a cut-off, if one exists.

   b. List candidates separately by classes, alphabetically or by point rating, including the names of current chapter members. Show class and curriculum in the appropriate columns for each student.

   c. Indicate present chapter members by placing an M in the proper column opposite their names on the report; DO NOT PLACE MARKS IN ANY OTHER COLUMNS ON THIS OR SUBSEQUENT REPORTS FOR PRESENT MEMBERS.

   d. Indicate previously elected (postponed or financial refusal from prior elections) candidates by placing an E in the proper column opposite their names. A list of candidates in this category is sent to the chapter at the beginning of each term. (See page B-21.)

   e. State the number of sets of electees’ materials (Constitution and Bylaws & Information Books, etc.) required. Please estimate the number needed as accurately as possible to minimize waste.

   f. State the number and type of Bent castings desired in the space provided at the bottom. The chapter account will be charged for castings ordered and shipped.

   NOTE: WE RECOMMEND THAT YOU DO NOT ELECT THESE CANDIDATES WITHOUT APPROVAL FROM HEADQUARTERS, TO PREVENT POTENTIAL EMBARRASSMENT TO YOU, YOUR CHAPTER, AND THE ASSOCIATION.
2. *Report of Election (submit online) and permanent-record Catalog Cards (mail)*

Immediately after you have collected the permanent-record catalog cards from the electees who have accepted election, the corresponding secretary should submit the REPORT OF ELECTION online and catalog cards to Headquarters, prepared as follows:

a. Place X in the appropriate columns opposite the names of candidates, indicating election or rejection by the chapter and acceptance or refusal by the electee. For those who have been rejected by the chapter, place A1, A2, B, C, or D in the proper column to indicate the reason (rejection-code information is at the top of the election report by using the HELP button). If an electee refused membership, simply place an X in the appropriate column. You will be asked to indicate his or her reason for refusal on the REPORT OF FINAL ACTION. (See notes and explanations on the reports.)

b. Add nothing in columns to the right of the Present Member column.

c. For persons previously elected (postponed or financial refusal), put X in Elected and Accepted columns if they are to be initiated.

d. **State your planned date of initiation** in the space provided.

e. Send one paper, permanent-record catalog card for each electee who has accepted election to Headquarters with the REPORT OF ELECTION; the second completed card is for your chapter records. Complete the electronic cards also.

f. If your chapter has any postponed or financial refusal electees, be sure to return the Postponed and Financial Refusal Electee list from previous elections, marked appropriately for action by chapter, with the Report of Election.

*NOTE:* DO NOT INITIATE THESE ELECTEES WITHOUT APPROVAL FROM HEADQUARTERS (Bylaw VI, Sec. 6.05(b)). (See page B-27.)
### 3. Report of Final Action (submitted online) and Roll Book Signatures (send)

Immediately after the initiation, the corresponding secretary should submit the REPORT OF FINAL ACTION and mail a photocopy of the Roll Book signatures to Headquarters, prepared as follows:

a. Be sure that the action on each candidate is clearly indicated by marks in the appropriate columns opposite each name.

b. Place nothing in columns to the right of the Present Member column.

c. (1) If a candidate was marked as refused on the Report of Election indicate the reason for refusal by placing A or B in the appropriate column.

(2) If a candidate was marked as having accepted election on the Report of Election but he or she later refused, indicate the reason (A or B) in the Reason Refused column.

d. Place an X in the proper column for electees who were initiated. For an electee whose initiation has had to be postponed, please add the estimated approximate date of his or her initiation (i.e., Spring 2012). Postponed electees can be initiated only if they remain eligible, unless your Advisory Board properly approves the postponement and documents that approval to the Secretary-Treasurer (see below).

e. Place the date your initiation was held in the proper space. Make a PDF or photocopy of the Roll Book signatures (copy all names on each page pertinent to this initiation) and mail it when you submit the REPORT of FINAL ACTION. Your initiates will be processed as members when the signatures arrive.

**Postponed and Financial Refusal Electees:**

a. If your chapter has any postponed or financial refusal electees, be sure to indicate this information on the online Report of Final Action so that they may have a chance of being initiated in the future.

b. Those persons listed on this report whose postponements are approved and documented by the Advisory Board and reported to the Secretary-Treasurer may be initiated at the next regular initiation. Their postponements will be considered approved. Examples of valid reasons to miss an initiation include:

   - Military duty,
   - Death in family,
   - Personal accident or illness,
   - Natural disaster,
   - Employment work schedule, and
   - Job interview.

You may also decide, document, and report that a person’s postponement is unapproved. Please refer to the three options explained on the Postponed Electee list (page B-21).
THE TAU BETA PI ASSOCIATION
REPORT OF ELIGIBILITY
(For Graduate Student, Alumnus, and Eminent Engineer Candidates)

Tennessee Omega Chapter University of Hard Knocks College or University

The following graduate student, alumnus, and eminent engineer candidates are being considered for election to membership in this chapter of Tau Beta Pi. The Advisory Board certifies that they are worthy of membership in the Association and will approve their election if they are judged eligible under Constitution Art. VIII, Sec. 3, 4, 5, or 6. Listed is the Section and Subsection under which this chapter wishes to elect each candidate. (Refer to the Constitution for exact subsection.) Attach the: 1) class rank statement or letter of recommendation and certification that at least 50% of the degree requirement has been completed for each graduate student (Sec. 3); 2) class rank statement and professional engineering record for alumni (Secs. 4 or 5) professional engineering record for eminent engineers (Sec. 6).

NAME: Peter W. Peachtree
Sec. 3, Grad., Sec. 4, Alum., Sec. 5 Alum., Sec. 6, Em. Eng.
For Sec. 3 if, and only if, class rank is unavailable: I recommend for membership in Tau Beta Pi and certify that the student above has completed at least half of the required course work including research. ____________________________
Student’s Primary Advisor’s Signature

<table>
<thead>
<tr>
<th>Educational Background:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution(s)</td>
</tr>
<tr>
<td>NE Inst. of Tech.</td>
</tr>
</tbody>
</table>

NAME: Rocket J. Squirrel
Sec. 3, Grad., Sec. 4, Alum., Sec. 5 Alum., Sec. 6, Em. Eng.
For Sec. 3 if, and only if, class rank is unavailable: I recommend for membership in Tau Beta Pi and certify that the student above has completed at least half of the required course work including research. N/A
Student’s Primary Advisor’s Signature

<table>
<thead>
<tr>
<th>Educational Background:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution(s)</td>
</tr>
<tr>
<td>Vossamotta Univ.</td>
</tr>
<tr>
<td>Frostbite Falls State</td>
</tr>
</tbody>
</table>

NAME: Ronald P. Rangefield
Sec. 3, Grad., Sec. 4, Alum., Sec. 5 Alum., Sec. 6, Em. Eng.
For Sec. 3 if, and only if, class rank is unavailable: I recommend for membership in Tau Beta Pi and certify that the student above has completed at least half of the required course work including research. N/A
Student’s Primary Advisor’s Signature

<table>
<thead>
<tr>
<th>Educational Background:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Institution(s)</td>
</tr>
<tr>
<td>Univ. of Hard Knocks</td>
</tr>
<tr>
<td>&quot;</td>
</tr>
<tr>
<td>&quot;</td>
</tr>
</tbody>
</table>

INSTRUCTIONS:
1. Complete ALL information.
2. Attach required documentation described below.
3. Mail to Headquarters before election of members.
4. The reports must be received at least 2 weeks prior to initiation, or it will not be processed.
5. All educational background and current degree information must be included.

Eligibility report will NOT be processed unless educational background is included (including degree in process if a grad student).

REQUERED DOCUMENTATION:
Graduate Student (Section 3)
1. Class rank statement showing top 1/5 standing and
2. Letter from primary advisor stating student has completed at least half of course work including research.
If, and only if, class rank statement cannot be obtained, a letter of recommendation from the student’s primary advisor may be used. (Primary advisor’s signature meets this requirement.)

Alumnus (Sections 4 & 5)
1. Class rank statement showing top 1/5 standing and
2. Professional engineering record (resume).

Eminent Engineer (Section 6)
1. Professional engineering record (resume or vitae).

Notes: This report, properly & completely filled out with attachments, provides all the eligibility data required by Bylaw VI, Sec. 6.04(a) and Constitution Art. VIII, Sec. 3 for graduate students, and Sec. 7 for alumni and eminent engineers.

Complete and sign this report and return with attachments as soon as possible for permission to hold election. Initiation approval cannot be given nor keys and certificates ordered until the Report of Election is submitted online and Catalog Cards are received.

Signatures:
Chief Advisor ____________________________ Secretary ____________________________
President ____________________________ Date September 30, 2002
B. FOR GRADUATE-STUDENT, ALUMNUS, & EMINENT-ENGINEER CANDIDATES

1. Report of Eligibility (use paper report only for eligibility)

Immediately after data on candidates have been compiled, the corresponding secretary should send the REPORT(s) OF ELIGIBILITY to Headquarters, prepared as follows:

a. Complete the special REPORT OF ELIGIBILITY for graduate-student, alumnus, and eminent-engineer candidates, giving names, educational background, and sections of Constitution Article VIII under which they are being considered.

Additional letters for graduate students and résumés for alumni and eminent engineers documenting other necessary qualifications and evidence of eligibility of these candidates must be appended to this report.

A graduate student must have been in residence for at least one semester or two quarters and have completed at least 50% of the degree requirements, including coursework and research, as determined by the student’s primary academic advisor and certified directly on the report.

b. The Advisory Board must certify the worthiness of these candidates; this may be accomplished by asking the chair of your Advisory Board to sign the report form.

**NOTE:** PLEASE DO NOT ELECT THESE CANDIDATES WITHOUT APPROVAL FROM HEADQUARTERS. One or more of them may be ineligible (Const. VIII, Sec. 3 & 7(c); Bylaw VIII, Sec. 8.04).

2. Report of Election and Catalog Cards

Immediately after you have collected the catalog cards from the electees who have accepted election, the corresponding secretary should complete the REPORT OF ELECTION online as follows and complete the electronic catalog cards online:

a. Complete the online REPORT OF ELECTION for graduate-student, alumnus, and eminent-engineer candidates, indicating election or rejection by the chapter and acceptance or refusal by the electee.

Explanation for rejection of any candidate should accompany this report, on a separate sheet.

b. Send one original paper catalog card for each electee who has accepted election to Headquarters; the second completed card is for your chapter records.

**NOTE:** DO NOT INITIATE THESE ELECTEES WITHOUT APPROVAL FROM HEADQUARTERS, regardless of instructions from your Advisors or dean. This will protect you, your chapter, and TBII from the embarrassment of initiating an ineligible candidate or a member and protect your chapter from probation (Bylaw VI, Sec. 6.05(b); B. VIII, Sec. 8.04). (See B-27.)
3. **Report of Final Action and Roll Book Signatures**

Immediately after the initiation, the corresponding secretary should submit the REPORT OF FINAL ACTION and send a photocopy of the Roll Book signatures to Headquarters, prepared as follows:

a. Complete the online REPORT OF FINAL ACTION for graduate-student, alumnus, and eminent-engineer candidates. Be sure that the action taken on each candidate is clearly indicated by marks in the appropriate columns opposite each name.

b. If an electee refused membership, please explain the specific reasons on a separate sheet.

c. Place an X in the proper column for electees who were initiated. For an electee whose initiation has had to be postponed, please include the estimated **approximate** date of his or her initiation (i.e., Spring 2012). Postponed electees can be initiated **only** if they remain eligible, unless your Advisory Board properly approves the postponement and documents that approval to the Secretary-Treasurer (see page B-28).

d. Insert the date your initiation was held in the proper space, and submit the Report.

e. Make a PDF or photocopy of and send the Roll Book signatures (copy all pages pertinent to this initiation).

**C. DISCIPLINE POLICY FOR UNAPPROVED INITIATIONS**

In 1989 the chapters ratified an amendment to the Constitution and Bylaws to make a chapter that conduct two unapproved initiations within two years subject to probation by the Executive Council. Council policy regarding unapproved initiations is:

1. After a Chapter’s first unapproved initiation, the Secretary-Treasurer of the Association will send a letter to the Chapter with copies to the dean of engineering and Chapter Advisors warning it of impending discipline by probation.

2. After a Chapter’s second unapproved initiation within a period of two consecutive fiscal years (refer to C-IX, 2(b)), the Executive Council will notify the Chapter that within four weeks:

   A) It must provide the Secretary-Treasurer the name of the faculty Advisor it has designated to be in charge of the election process, including the securing of approval to conduct each of the next two initiations; &

   B) It must temporarily return its charter to the Secretary-Treasurer. The Secretary-Treasurer will contact the designated Advisor and review the election procedures.

3. If the Chapter fails to comply with the Council’s requirements within the specified four-week period and/or it holds a third unapproved initiation within two consecutive fiscal years, it will be placed on probation. Further elections will be null and void until the Chapter is removed from probation. The Council will “present at the next regular Convention the complaint against the Chapter and the Chapter’s reply” and follow the procedure given in C-IX, 2(b).
D. POSTPONED INITIATIONS FLOW CHART

Postponed Initiations Flow chart

* = May not be initiated.

Eligible?

Elected?

Initiated?

Initiation Postponed?

Advisory Board Evaluation?

Send letter for approved postponements to HQ.

(Next Term)

Approved Postponement? Does HQ have letter?

Eligible?

Graduated?

> 5 years since Election?
VII. Facts for Electees

A. A summary of facts of which each electee should be aware is listed below:

Introduction

- TBII is the engineering honor society, founded at Lehigh University, Bethlehem, PA, on June 15, 1885. The annual Convention governs the Society.
- 8,000 initiates/year.
- 526,000 total / 475,000 living members; world’s largest engineering society.
- 238 collegiate chapters; 18 active alumnus chapters.
- 2010-14 Executive Council is from AZ/FL/SD.

Eligibility and Initiation

- Students of exemplary character are selected from the upper 1/5 of the senior engineering class and top 1/8 of the junior engineering class.
- All members are elected by the undergraduate student membership. No faculty input is required.
- The initiation ceremony requires a solemn promise to uphold honor/ethics & to support TBII.

Finances

- Total chapter initiation fee of $___ includes: $___ that stays with chapter and a $39 national fee.
- The $39 national fee includes:
  —$32 initiation fee (effective August 2004)
    • $8.00—membership key
    • $3.40—membership certificate
    • $8.40—4-year subscription to THE BENT
    • $1.90—Constitution & Information Books
    • $10.30—expenses of the Society
  (For an additional $5, initiate may order a full-size Bent lapel pin instead of the official key; the order must be placed when the catalog cards are mailed; extra time is required to process the order.
  —$7 Convention assessment (effective August 2008)
- No dues; however, thousands of alumni help to honor new members by contributing to the annual Alumni Giving Program, which reduces the initiation fee.
  In 2010-11, ~12,000 members gave $930,000 to TBII.
- Distribute BENT Life-Subscription cards to initiates. Cost is $60 later, or $5.00 now, plus four annual installments of approximately $12.50.
- 79,000 Life Subscribers; cash transfers to Fellowship Fund when subscriber dies.

Programs

- Alumnus Giving—Enable the engineering profession to help recognize new members and support TBII programs
- Chapter Award—Outstanding and Most Improved Chapters and Most Improved Membership
  —Outstanding project activity & reporting/documentation
  —Scholarships of $500 for outstanding 3-year project performance
- District—National officers visit, help, and teach chapter officers
- Distinguished Alumnus—Recognize outstanding alumni
- Engineering Futures—Provide critical leadership training instruction to student members
- Fellowship—$200,000 in $10,000-stipends to 20 Fellows
- Greater Interest in Government—Cash grants for public-oriented chapter projects
- Laureate—$2,500 awards to students who exemplify in outstanding fashion a “spirit of liberal culture”
- McDonald Mentor Award—$1,000 to Mentor & to Mentor’s chapter
- MindSET—Cash grants for K-12 chapter projects
- National Outstanding Advisor—$1,000 to advisor & to dean’s discretionary fund
- Scholarship—$2,000 grants to 190 or more engineering college seniors
- Student Loan—$20,000 on loan to members; $2,500 educational loan maximum
- Student Assistance—$2,000 available for grants to deserving student members

Rev. — December 2011
VII. Facts for Electees

B. Information about the Ritual of which each electee should be aware:

Much of TBDI’s difficulty with the words “covenant,” “secret ritual,” “creed,” and “solemn promise” are theological in nature. TBDI does not use these words in that context. The text below presents the broader, historical definitions of these phrases in order to give candidates time to think about the phrases’ meanings in order to make a decision about joining prior to the day of the initiation.

During the past 100+ years there have been concerns about the “secret” ritual of the Association. The Association prides itself on its long traditions, which include tracing the history of our initiation ritual to the Founder of TBDI. In order to fully understand our Association and our Ritual, it is important to understand our past and the conditions that were present at the time of our founding. This is one reason that we require our members to read the Association documents prior to being initiated.

As times change, the contemporary interpretation of words and activities from our history change. However, it is critical for us to maintain an understanding of the intent of the original words. There is a clear distinction between contract and covenant. The original intent of the Founder of Tau Beta Pi was that our principles, which are today encompassed by “Integrity and Excellence in Engineering,” will remain even if some members violate those conditions. Thus one member failing to maintain Integrity and Excellence does not release TBDI or any other member from their parts of the agreement.

Philosophy

A CONTRACT is an agreement made in suspicion. The parties do not trust each other, and they set “limits” to their own responsibility. In this context, when one party violates the limits of the contract the other party is freed from their responsibilities and is entitled to some recourse.

A COVENANT is an agreement made in trust. The parties share a mutual trust and put no limits on their own responsibility. In this context, when one party violates the limits of the covenant the other party retains full responsibility to the terms of the original agreement.

Definitions as intended by Tau Beta Pi
(Found in Merriam Webster Dictionary, 2008.)

1. **Creed**—a set of fundamental beliefs; also: a guiding principle

2. **Covenant**—a usually formal, solemn, and binding agreement

3a. **Solemn**—marked by the observance of established form or ceremony

3b. **Promise**—to pledge to do, bring about, or provide
VIII. Election Procedure Information File

A. Index to Election Procedure Information File

The Headquarters’ Election Procedures Information File contains documentation and samples that chapters have used in conducting their character evaluations and election procedures. Its contents are outlined below; copies of any samples are available upon request. Please specify the exact type(s) you would like (e.g., E. Electee exams).

A. Letters to Candidates—notification of scholastic eligibility (or use the TBII informal Invitation to Orientation, with envelope (“Tau Beta Pi is considering you”) (see page C-40 and C-42)
   1. Get-Acquainted Procedure
   2. Caucus Procedure
   3. Interview Procedure
   4. Résumé Procedure
   5. Miscellaneous

B. Faculty recommendation letters

C. Résumé forms

D. Interviewer question forms

E. Electee exams

F. Letters to New Electees—notification of election (or use the formal INVITATION to ELECTEES, with response card and envelope (Congratulations! Tau Beta Pi invites you.) (see page C-40 and C-42)

G. Notification of rejection letters

H. Letters of congratulation to candidates from dean

I. Letters of congratulation to parents of candidates from dean (see sample on next page & website)

J. Membership Committee Instructions

K. Election of Graduate Students, Alumni, and Eminent Engineers programs

Rev.—February 2008
B. Letter of Congratulation to Parents of Candidates from Dean

Office of the Dean of Engineering
Marvelous University
October 1

Dear <Parents>:

Congratulations on your <daughter’s> invitation to join Tau Beta Pi. This is a very important recognition of <her> accomplishments as a student in the College of Engineering of Marvelous University. On behalf of all the members of the faculty, I extend to you and your <daughter> sincere congratulations.

Tau Beta Pi is the second oldest Greek-letter honor society in America; the oldest is Phi Beta Kappa. Both societies are well known and respected throughout the United States. The latter is restricted to students in the liberal arts, while Tau Beta Pi is designed to “offer appropriate recognition for superior scholarship and exemplary character to students in engineering.” To qualify scholastically, your <daughter> ranked among the top eighth of the junior class, or the top fifth of the senior class of engineering students.

Since 1925 the Hawaii Beta Chapter of Tau Beta Pi has been one of the major student organizations in this college. Today, it is also a major chapter in the United States in both student and alumnus membership. The chapter is not only an honor society to pay tribute to outstanding students; it also provides a vehicle for such students to assume a role of leadership in the college and to be of distinctive service. Tau Beta Pi members are active in engineering student publications, the engineering recruiting project, and in a variety of other honor societies and organizations. It is one of the most prestigious engineering societies to which your <daughter> can be elected as an undergraduate. Enclosed is an introductory brochure that further explains the lifelong benefits of membership in Tau Beta Pi.

The first meeting for those scholastically eligible to join Tau Beta Pi will be held on Tuesday, October 7, at 7:00 p.m. in Room 101, Engineering Building. Attendance is absolutely necessary for those who wish to join. I am writing this to you because address changes always seem to result in a few eligible students not being contacted in time. If you think your <daughter’s> invitation might not have reached her, please be sure <she> does know about this important first meeting.

In order to support the operation of the local chapter and the national organization, Hawaii Beta must charge an initiation fee of $75. I heartily endorse membership in Tau Beta Pi, and I hope your <daughter> will give her invitation very serious consideration; the returns on the initiation fee should be more than worthwhile.

Part of each new member’s initiation fee pays for the ticket to the initiation banquet, which will be on November 15. Many parents make it a point to attend the banquet and honor our outstanding students. As a member myself for many years, I look forward to seeing you there. Thank you, and best regards.

Sincerely,

Edward H. Williams VI, Ph.D., P.E.
Dean

Enclosure