PRESIDENT’S BOOK

Manual of Chapter Operations
20th Edition

THE TAU BETA PI ASSOCIATION
508 Dougherty Engineering Building, University of Tennessee
P.O. Box 2697
Knoxville, Tennessee 37901
www.tbp.org

December 2011
If there were ever a time to dare,  
to make a difference,  
to embark on something worth doing,  
it is now.  
Not for any grand cause, necessarily—  
but for something that tugs at your heart,  
something that’s your aspiration,  
something that’s your dream.

You owe it to yourself to make your days here count.  
Have fun.  
Dig deep.  
Stretch.

**Dream big.**

Know, though, that things worth doing seldom come easy.  
There will be good days.  
And there will be bad days.  
There will be times when you want to turn around,  
pack it up, and call it quits.  
Those times tell you that you are pushing yourself,  
that you are not afraid to learn by trying.

**Persist.**

Because with an idea,  
determination, and the right tools,  
you can do great things.  
Let your instincts,  
your intellect,  
and your heart guide you.

**Trust.**

Believe in the incredible power of the human mind.  
Of doing something that makes a difference.  
Of working hard.  
Of laughing and hoping. Of lazy afternoons.  
Of lasting friends.  
Of all the things that will cross your path this year.

The start of something new brings the hope of something great.  
Anything is possible.  
There is only one you.  
And you will pass this way only once.

**Do it right.**

*Author Unknown*
FOREWORD

The purpose of the President’s Book (online: www.tbp.org) is to strengthen chapters by providing valuable information to guide new officers. No chapter is bound by anything herein not specifically covered by the Constitution and Bylaws or Convention acts of the Association. All material is offered from the experiences of many Tau Bates to help you to operate your chapter efficiently.

The President’s Book is intended as a framework for each chapter’s individual, personalized guidebook. New traditions, policies, projects, and other special chapter information should be carefully written and inserted at the end of the appropriate main section. Please hand this book to your successor after officer election and emphasize areas where questions arise. The successful operation of a chapter depends primarily on the quality of leadership offered by its chief administrative officer!

The first edition of the President’s Book was published in May 1940 by Secretary-Treasurer R.C. Matthews. The material in it was collected and edited by successive presidents of North Carolina Alpha, E.J. Angelo Jr. and Ben S. Pace. Succeeding editions drew on the experience of national officers and chapter presidents. Revisions were made by these former national officers: M.E. Van Valkenburg, Douglas R. Briggs, Leonard A. Cohn, Fred F. Lyle Jr., James R. Young, Ralph E. Warmack, David J. Soukup, Secretary-Treasurer Robert H. Nagel, and Executive Director James D. Froula. The Election Procedures Committee of the 1978 Convention, headed by Diane T. Finegood and James W. Johnson Jr., provided material for the Eligibility Rules and Election and Initiation of New Members section.

Specific suggestions for modifications to this manual are most welcome. Replacement pages may be obtained without charge.

Curtis D. Gomulinski
Executive Director, Secretary-Treasurer and Editor

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Section A

SUGGESTIONS FOR THE PRESIDENT

I. Chapter Management: A TBPI System

What engineering manual would be complete without a system flowchart? Actually, running a TBPI 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*:

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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 TBPI 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 TBPI 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 TBPI 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.

* 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 TBII which leads to the formation of a tighter-knit chapter.
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 TBII 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 TBII representatives when they are kept fully informed.

Use TBII 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 TBII. 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.

One, it helps your officers understand their responsibilities, so that they don’t have to “reinvent 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.

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 TBII 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.

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

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

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<th>September</th>
<th>October</th>
<th>Nov./Dec.</th>
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<tr>
<td><strong>Election and Initiation</strong></td>
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<tr>
<td>Compile list of eligible candidates, including graduate students, alumni, &amp; eminent engineers.</td>
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<tr>
<td>Submit Report of Eligibility to HQ. (only undergraduate reports are online).</td>
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<td></td>
<td></td>
<td>Submit Report of Final Action; send fees &amp; copy of roll book signatures to HQ.</td>
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<tr>
<td>Outline election procedures at first meeting.</td>
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| Chapter Administration | | | | |
| | Check Advisory Board membership; request from HQ. | | | | | Outline Chapter goals at first meeting. |
| | Hold Advisory Board meeting to plan Chapter year. | | | | |

| Convention | | | | |
| | | Make travel plans online. | | | | 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:
- 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

### Chapter Deadlines:

A-6a
## II. Typical Chapter Schedule

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<thead>
<tr>
<th>Election and Initiation</th>
<th>January</th>
<th>February</th>
<th>March</th>
<th>April</th>
<th>May/June</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submit Report of Eligibility to HQ.</td>
<td>Hold first meeting of electees. Submit Report of Election &amp; catalog cards to HQ. (Keys &amp; certificates will be ordered from cards.)</td>
<td>Install Chapter officers.</td>
<td>Host Engineering Futures meeting.</td>
<td>Prepare Greater Interest in Government proposal, no deadline.</td>
<td>Send to HQ: Conv. Credentials Financial Rpt. (online) Chapter Survey (online)</td>
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<th>April</th>
<th>May/June</th>
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<th>May/June</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepare McDonald Mentor nomination, due 4/1.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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 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

A-7
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.

<table>
<thead>
<tr>
<th>Date</th>
<th>Addressee</th>
<th>Subject (&amp; Due Date)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2/1</td>
<td>President</td>
<td>• Convention Credentials (June 1) &amp; Officer Election Report w/ Billing Information</td>
</tr>
<tr>
<td></td>
<td>cc: Chief Advisor</td>
<td></td>
</tr>
<tr>
<td>Feb.</td>
<td>Advisor</td>
<td>• Convention Invitation</td>
</tr>
<tr>
<td>Mar.</td>
<td>President</td>
<td>• Annual Chapter Survey (June 1)</td>
</tr>
<tr>
<td></td>
<td>Advisor &amp; cc: Pres.</td>
<td>• Chapter Survey &amp; Evaluation (June 1)</td>
</tr>
<tr>
<td>Apr.</td>
<td>President</td>
<td>• Financial Report (June 1)</td>
</tr>
<tr>
<td>cc: Treasurer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5/1, 6/1</td>
<td>Treasurer &amp; cc: Pres.</td>
<td>• April 30/May 31 Account Statement</td>
</tr>
<tr>
<td>7/1</td>
<td>Convention Attendees</td>
<td>• Convention First Letter</td>
</tr>
<tr>
<td>8/1</td>
<td>Convention Delegates</td>
<td>• Convention Committee Assignment</td>
</tr>
</tbody>
</table>
| Aug. | Convention Attendees | • Convention Final Letter  
• Chapter Development Program |
| Sept. | President | • Eligibility, Election, & Initiation Reports & Procedures  
• Informational Materials & Fall Candidate Packets |
| cc: Chief Adv. | |
| Sept. | President | • Fellowship (Feb. 1); Distinguished Alumnus (Feb. 1); Scholarship (Mar. 1); Laureate (4/1); Outstanding Advisor; & McDonald Mentor Award Programs (4/1) |
| Registrar | | • Constitution & Bylaws Amendment Ratification |
| Advisors cc: Pres. & Dean | | • Appreciation & Information |
| Treasurer cc: Pres. & Chief Adv. | | • Sept. 30 Account Statement w/ Billing Information |
| Pres. & Treas. cc: Chief Adv. | | • Student Loan Program |
| Convention Attendees | | • Convention Minutes & President’s Report posted, & Ratification Ballot (4/1) |
| Jan. | President | • Eligibility, Election, & Initiation Reports & Procedures  
• Informational/Display Materials |
| Feb. | President | • Laureate, McDonald Mentor, & Outstanding Advisor Award Nominations (4/1) |
| Feb. | Treasurer | • IRS Form 990-N |

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

Rev.—February 2011
V. The District Program

Schemes for organizing TBII’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 TBII 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 TBII 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.
## ROBERT'S RULES OF ORDER
### Principal Rules Governing Motions

<table>
<thead>
<tr>
<th>Order of Precedence</th>
<th>Can interrupt speaker?</th>
<th>Requires a second?</th>
<th>Debatable?</th>
<th>Amendable?</th>
<th>Vote required?</th>
<th>Applies to what motions?</th>
<th>Motion can have what applied to it (in addition to withdraw)?</th>
<th>Can be renewed?</th>
<th>Rule Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>I. Privileged Motions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A. Fix the time to which to adjourn - (when privileged, only when another question pending).</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Majority</td>
<td>None</td>
<td>Amend</td>
<td>Yes</td>
<td>10</td>
</tr>
<tr>
<td>B. Adjourn - (privilege if in any way qualified or if effect is to dissolve assembly).</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>None</td>
<td>None</td>
<td>Yes</td>
<td>17</td>
</tr>
<tr>
<td>C. Take a Recess - (privilege only when other business is pending).</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Majority</td>
<td>None</td>
<td>Amend</td>
<td>Yes</td>
<td>18</td>
</tr>
<tr>
<td>D. Raise a Question of Privilege.</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No vote</td>
<td>None</td>
<td>None</td>
<td>Yes</td>
<td>19</td>
</tr>
<tr>
<td>E. Call for the Orders of the day.</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No vote</td>
<td>None</td>
<td>None</td>
<td>Yes</td>
<td>20</td>
</tr>
<tr>
<td>II. Subsidiary Motions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F. Lay on the Table.</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>1-D, E, II-K, III, appeal</td>
<td>None</td>
<td>Yes</td>
</tr>
<tr>
<td>G. Previous Question.</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>None</td>
<td>None</td>
<td>Yes</td>
</tr>
<tr>
<td>H. Limit or Extend Limits of Debate.</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Majority</td>
<td>2/3</td>
<td>Any debatable or amendable</td>
<td>Amend</td>
<td>Yes</td>
</tr>
<tr>
<td>I. Postpone to a certain time.</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>2/3</td>
<td>Any debatable pending motion</td>
<td>Amend, limited debate</td>
<td>Yes</td>
</tr>
<tr>
<td>J. Commit or Refer.</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Main</td>
<td>None</td>
<td>Limit debate, amend</td>
<td>Yes</td>
</tr>
<tr>
<td>K. Amend.</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Not always, not when main motion not debatable</td>
<td>None</td>
<td>Any</td>
<td>No</td>
</tr>
<tr>
<td>L. Postpone indefinitely.</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Majority</td>
<td>Main</td>
<td>No subsidiary motion</td>
<td>None</td>
<td>No</td>
</tr>
<tr>
<td>III. Main Motions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>M. General.</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>None</td>
<td>Any</td>
<td>No</td>
<td>35</td>
</tr>
<tr>
<td>N. Take from Table.</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>Motion</td>
<td>Motion</td>
<td>No subsidiary motion</td>
<td>Yes</td>
</tr>
<tr>
<td>O. Reconsider.</td>
<td>Yes, by vote of majority</td>
<td>Yes, except when main motion not debatable</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Specified</td>
<td>Limit debate, postpone indefinitely</td>
<td>Yes</td>
<td>37</td>
</tr>
<tr>
<td>P. Rescind, Repeal, or Amend.</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>Majority</td>
<td>All main</td>
<td>All subsidiary motions</td>
<td>No</td>
<td>38</td>
</tr>
<tr>
<td>Q. Renewal.</td>
<td>In general at another session</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>39</td>
</tr>
<tr>
<td>R. Ratify.</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Majority</td>
<td>Approval of action</td>
<td>None</td>
<td>No</td>
<td>40</td>
</tr>
<tr>
<td>IV. Incidental Motions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>S. Point of Order.</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Vote</td>
<td>Majority or tie</td>
<td>Decision of chair</td>
<td>No</td>
</tr>
<tr>
<td>T. Appeal.</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>2/3</td>
<td>No</td>
<td>Any appeal</td>
<td>No</td>
</tr>
<tr>
<td>U. Suspension of rules.</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>2/3</td>
<td>No</td>
<td>Any appeal</td>
<td>No</td>
</tr>
<tr>
<td>V. Object to consideration of question.</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>2/3 opposed to consideration</td>
<td>No</td>
<td>Any appeal</td>
<td>No</td>
</tr>
<tr>
<td>W. Division of a Question.</td>
<td>No</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>Majority</td>
<td>Main &amp; amendments</td>
<td>None</td>
<td>No</td>
<td>24</td>
</tr>
<tr>
<td>K. Division of Assembly.</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
<td>Voice or hand vote</td>
<td>None</td>
<td>No</td>
<td>25</td>
</tr>
</tbody>
</table>
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.
<table>
<thead>
<tr>
<th>WEEK</th>
<th>PROCEDURE</th>
</tr>
</thead>
</table>
| 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 TBII 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 Tau Beta Pi 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 Tau Beta Pi 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 college. Eligibility is based upon either undergraduate or graduate scholarship.

(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. A release is required from the “home chapter” per Sec. 5(b).

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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.

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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, 1(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 TBII 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.
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: (l) 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

B-19
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</th>
<th>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>
<td></td>
</tr>
<tr>
<td>G.R. Jones, ’11</td>
<td>Postponed Fall 2010</td>
<td>APPROVED</td>
<td>Chapter has</td>
<td>______</td>
<td></td>
</tr>
<tr>
<td>*M.M. Mitchell, ’12</td>
<td>Postponed Fall 2010</td>
<td>Not ordered</td>
<td></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>
<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.

B-21
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.

Rev.—February 2008

B-22
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 an *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 an *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.)

Rev. —February 2008

B-23
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. x; 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

Educational Background:

<table>
<thead>
<tr>
<th>Institution(s)</th>
<th>College Degree(s)</th>
<th>Major(s)</th>
<th>Graduation Date(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>NE Inst. of Tech.</td>
<td>BS</td>
<td>Nav. Engg</td>
<td>May 2002</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

Educational Background:

<table>
<thead>
<tr>
<th>Institution(s)</th>
<th>College Degree(s)</th>
<th>Major(s)</th>
<th>Graduation Date(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vossamotta Univ.</td>
<td>BS</td>
<td>Aero Engg</td>
<td>Jan. 1982</td>
</tr>
<tr>
<td>Frostbite Falls State</td>
<td>MS</td>
<td>Forest Eng</td>
<td>Jan. 1989</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

Educational Background:

<table>
<thead>
<tr>
<th>Institution(s)</th>
<th>College Degree(s)</th>
<th>Major(s)</th>
<th>Graduation Date(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>&quot;</td>
<td>&quot;</td>
<td>MS</td>
<td>1970</td>
</tr>
<tr>
<td>&quot;</td>
<td>&quot;</td>
<td>PhD</td>
<td>1971</td>
</tr>
</tbody>
</table>

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
President

Secretary
Date

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).

REQUIRED 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.

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

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

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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.)

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?

Graduated?

> 5 years since Election?

Yes

No

Yes

No

Yes

No
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 TBII’s difficulty with the words “covenant,” “secret ritual,” “creed,” and “solemn promise” are theological in nature. TBII 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 TBII. 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 TBII 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 TBPI 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
I. DUTIES OF OFFICERS

A. Regular Chapter Officers

The six regular officers of a chapter must be active members in the technical sense of Constitution Article VI, Section 1. They are usually undergraduates; however, a number of chapters have graduate-student presidents, many have faculty treasurers, and a few have faculty corresponding secretaries. The duties of chapter officers are specified by Const. Art. VI, Sec. 6, and Bylaw V, Sec. 5.03. Although officers’ responsibilities often overlap, a typical list of chapter properties and the officer responsible for them is given below:

<table>
<thead>
<tr>
<th>OFFICER</th>
<th>See Bylaw V, Sec.</th>
<th>RESPONSIBLE FOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. President</td>
<td>5.03(a)</td>
<td>President’s Book, gavel, initiation equipment, chapter files, and records</td>
</tr>
<tr>
<td>2. Vice President</td>
<td>5.03(b)</td>
<td>Initiation equipment, electees’ materials</td>
</tr>
<tr>
<td>3. Recording Secretary</td>
<td>5.03(c)</td>
<td>Secretary’s Book, chapter records, extra copies of Constitution and Bylaws booklets</td>
</tr>
<tr>
<td>4. Corresponding Secretary</td>
<td>5.03(d)</td>
<td>Reports to Headquarters, current addresses of officers</td>
</tr>
<tr>
<td>5. Treasurer</td>
<td>5.03(e)</td>
<td>Treasurer’s Book, checkbook, financial records</td>
</tr>
<tr>
<td>6. Cataloger</td>
<td>5.03(f)</td>
<td>Catalog cards, Roll Book, up-to-date alumnus records</td>
</tr>
</tbody>
</table>

B. The Advisory Board

1. General Responsibilities and Authority

The full Advisory Board consists of the four alumnus Advisors and the President, Vice President, and Corresponding Secretary of the chapter. It draws authority and responsibility from Const. Art. VI, Sec. 7(b): “The Advisory Board shall act as an advisory and judiciary committee to determine the advisability of any action taken or proposed by the Chapter . . . by a majority vote, the Advisory Board may forbid any such action or change, subject to an appeal to the Executive Council.”

Advisors need not be members of the faculty, although they customarily are. They serve staggered terms of four years each, one new Advisor being elected each year in the spring when the other chapter officers are chosen.
Advisors have one major function—they provide the necessary continuity in chapter operations from year to year. The undergraduate membership goes through an almost complete turnover every year. Officers and committee chairs change annually or more frequently. It is not the responsibility of the alumnus Advisors to supervise the detailed work. But it does rest with them to see that policies and practices, especially with regard to the election of new members and finances, are uniform and fair from one year to the next. This is where the Advisors perform their most valuable work.

The Advisory Board should hold regularly scheduled informal meetings, perhaps several times per school term, but at least once per term. Some boards meet during a meal to discuss chapter operations, projects, and problems.

The Chief Advisor of a chapter is simply the one designated by the chapter to communicate with Headquarters during breaks and other times. This is vital. He or she may also serve as chair of the Advisory Board; the chair should always be an Advisor.

2. Duties of the Advisory Board

While the Advisory Board has the general responsibility of keeping a judicial eye on all chapter activities, some particular duties are specified by the Constitution and Bylaws. Chapter bylaws may add other responsibilities of local concern. The following references to the Constitution and Bylaws list the duties of the Board:

- Term of office and time of election: Const. Art. VI, 7(a) & Bylaw V, 5.01
- Reports of Advisory Board actions: Bylaw V, 5.03(d)(9)
- Chapter Bylaws: Const. Art. VI, 5, and 7(b)
- Chapter finances, assessments and dues: Bylaw V, 5.04(a)
- Eligibility of non-ABET/EAC curricula: Const. Art. VIII, 2(a)
  - Curricula under jurisdiction of a unit of engineering: Const. Art. VIII, 2(b)
  - Appealing non-ABET/EAC curricula: Const. Art. VIII, 2(c)
  - Exclusion of non-engineering curricula: Const. Art. VIII, 2(l)
- Eligibility of undergraduate-student candidates: Const. Art. VIII, 2(l)
  - Irregular students: Const. Art. VIII, 2(j)
  - Transfer students: Bylaw VI, 6.01(a)
  - Time of elections and initiations: C. VIII, 1(e), & Bylaw VI, 6.01(b)
  - Special elections and initiations: Const. Art. VIII, 2(l)
- Eligibility of graduate-student candidates: Const. Art. VIII, 3
  - Statement of worthiness: Const. Art. VIII, 3
- Eligibility of alumnus and eminent-engineer candidates: Const. Art. VIII, 7(c)
  - Approval of alumnus electees: Const. Art. VIII, 7(c)
- Election procedures: Bylaw VI, 6.03(c)
- Electee Activities: Bylaw VII, 7.01
- Financial inability: Const. Art. VIII, 10
- Inactive members: Bylaw VI, 6.06
- Initiation of ineligible candidates: Const. Art. VIII, 11
- Joint social functions: Bylaw VII, 7.08
- Removing a chapter officer for cause: Bylaw V, 5.01
- Suspension and expulsion of members: Const. Art. IX, 5
3. Choosing Alumnus Advisors

Preferably, chapter Advisors should be distributed among the engineering departments, not only one or two departments. If your school has several, try to rotate faculty representation on your Advisory Board so that all the departments over a period of years will have contributed the services of at least one person. Consult with your dean, department heads, or friends in industry for suggested candidates.

A chapter may have more than four alumnus Advisors if it wishes. Four of them should be selected to serve on the Advisory Board, while the others may be designated as honorary Advisors. This assures that the Constitutional provision of a four-to-three ratio of alumni to students on the Board is met.

An Advisor should be deeply interested in the chapter and eager to work with it and for it. Choose a person who will enjoy serving, and remember this important qualification: *Time.* Does that potential Advisor have time to put his or her experience and willingness to work for the chapter? A prominent older member of the faculty may not have sufficient time. A younger person, not yet overloaded with faculty, civic, and family responsibilities, may be a better Advisor than your dean or department head with a busy schedule. The chapter may profit from this kind of *glory by association,* but generally, the younger Advisor contributes more in the way of informed counseling because he or she is closer to the students and can devote more attention.

4. Using Your Advisors’ Services

Put your Advisors to work. Note the plural; it is not uncommon in Tau Beta Pi chapter life for one particular Advisor to have taken a keen and devoted interest in the group over a long period of years. Such Advisors have usually served for decades, and not only their chapters but the entire Association is in their debt. These Advisors have frequently acted in the name of the other three, by mutual consent, because they are in close touch with the students. Where such dedicated persons exist, chapter operations and service projects are likely to be better accomplished. If your chapter has such an Advisor, you are extremely fortunate. But remember the other three Advisors; take full advantage of their services and advice also.

There are many ways your Advisors can help beyond their specified duties. **We recommend that each chapter have one Advisor whose special business is to keep a watchful eye on finances.** It is a good policy to maintain a continuous vigilance over all fiscal matters in an organization as loosely tied together and as ever changing as a chapter. Some chapters have found it advantageous to have an Advisor serve as the treasurer, re-electing that person each year as long as the arrangement continues to be satisfactory to both parties. Some chapters with permanent treasurers have found it advantageous to have a student serve as assistant treasurer and handle routine operations, leaving overall supervision of financial matters to the treasurer.

Other possible duties or activities of the Advisors are: Audit the financial records at the end of each year and assist in preparation of the annual IRS return or 990-N, serve on initiation teams; attend routine chapter meetings, possibly on a rotating basis; provide space for the files and equipment when the chapter has no special room; provide wall space for hanging the framed charter—perhaps in the office of the Advisory Board chair, if the charter is not already permanently and properly displayed; and provide the services of a departmental secretary. Most Advisors are more than willing to do these things if asked!
5. **Advisor’s Book**

The *Advisor’s Book* has been sent to all Advisors, and copies are available from Headquarters. An HTML version is online under *Chapter Resources*. The booklet explains the basic scheme of chapter operations and the Advisors’ principal functions within the scheme; and it refers to this *President’s Book* as a source of detailed information on requirements and suggestions.

6. **Recognition of Advisors**

The presentation of gifts, certificates, or other tokens of appreciation to retiring alumnus members of the Advisory Board is heartily encouraged. Such presentations might well be made when new Advisors are installed.

C. **Suggestions for the Treasurer**

Detailed financial and accounting procedures for chapters have been printed in the Official Chapter Bookkeeping System Instructions and are not repeated here. Below is a listing of facts and suggestions which the president should remember. *If your treasurer does not have a copy of the official bookkeeping instructions, he or she should get one from Headquarters, even if your chapter does not or cannot use the official system*. The information is general in nature and will make your treasurer’s job easier.

1. **National Charges & Chapter Billing Information**

   a. The $32.00 national charge for every initiate (effective 2004) includes:
      
      Official gold-plated key $8.00  
      Certificate 3.40  
      Constitution, Information Book, etc. 1.90  
      Expenses of the Society 10.30

   b. Convention expenses are met by a charge to each new initiate of each chapter ($7.00 effective 2008, subject to change after each Convention). Provision should be made in the chapter budget for collecting this amount from each initiate for prompt payment immediately following each initiation.

   c. Statements of credits and charges are sent monthly, September to June, to all chapter treasurers by Headquarters. Chapter payments may be made online.

   ********************************************************************************

   Chapter Billing Information

<table>
<thead>
<tr>
<th>Item</th>
<th>Billing and Payment Schedule</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Initiation Fee</td>
<td>These two payments shall be sent to Headquarters within two weeks after each initiation. A statement is sent to the chapter treasurer at the end of each month showing all financial transactions and balance due.</td>
<td>B.V, Sec. 5.03(e)(1) and Bylaw I, Sec. 1.05</td>
</tr>
<tr>
<td>(&gt;$32 per member initiated) and Convention Assessment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>($7 per member initiated)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>(effective Aug. 1, 2008)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplies and Miscellaneous charges</td>
<td>Pay each month after receiving the invoice/statement of account.</td>
<td></td>
</tr>
</tbody>
</table>

Chapter payments may be made online. The 1983 Convention recommended that this information sheet be given to each newly elected chapter president and treasurer.

Notes: 1. Please do not send individual checks or cash from initiates.

2. A $25 charge for a returned check for a chapter payment will be billed to the chapter.
2. *Fees and Dues (National Bylaw V, 5.04)*

a. The average initiation fee is about $75 including the national initiation fee and Convention assessment.

(1) Chapters which do not maintain a system of dues, but which depend upon the initiation fees for operating expenses, may want to consider *graduated* fees, based on the months, terms, or semesters of academic work during which the member will probably be active. This would appear to call for the lowest fee to be charged to an alumnus member, who usually is not active in the chapter at all. However, most chapters feel that such a person, who can generally afford it, should be charged as much as or more than the average student fee.

(2) Chapters which do have a system of dues usually charge a base fee sufficient to cover the national initiation fee, the Convention assessment, and perhaps the banquet at which the member is initiated.

b. At the first or second meeting in the fall, the budget as set up by the chapter the previous spring or the president or a committee during the summer, should be fully considered, and the dues—if any—should be fixed to cover all probable chapter expenses for which special assessments are not made. These include the Convention charge, luncheons, dinners, dances, picnics, back debts if any, and other chapter needs, activities, or desires for the year.

c. Financial Refusal of Membership—See “Refusals of Election” section in this book regarding electees who are unable to pay the initiation fee (page B-18).

3. *Keeping Accounts*

a. The official TBP bookkeeping system is recommended.

b. The chapter officers sitting as a committee with the treasurer as chair, should prepare and submit to the chapter each year, a budget for the upcoming year of the probable receipts and expenses. This budget should be approved then and checked at the first meeting of the chapter in the fall. No changes should be made in the budget except for the most urgent reasons and after careful and thoughtful consideration.

c. If an Advisor is elected treasurer, in order to relieve him or her of the bother of handling small amounts, a petty cash fund might be established and placed in charge of a student assistant treasurer or the president. About $50 is placed in the petty cash fund, and operating expenses not in excess of, say $20, are paid from this. Duly signed and approved vouchers or receipted bills replace the cash so expended. When this fund is nearly exhausted, the vouchers, etc., are presented to the treasurer, who writes a check for their total amount, which is used to bring the petty cash fund back to its original value. Thus the treasurer pays by check expenditures exceeding $20.

d. Itemized reports should be presented to the treasurer with every request for money. The president should keep copies.

e. No expenditures should be made without the approval of the president.

f. It is absolutely necessary to make all records, vouchers, reports, etc., complete and in order. When money is handled, it is essential to leave no room for doubt or suspicion.
4. General Suggestions

a. Each chapter should try to establish a surplus for future use provided that in order to expend any of it the chapter should, at two meetings at least one week apart, authorize such expenditure by a three-fourths vote of the active membership. Such action is subject to the approval of the Advisory Board.

b. When any accumulated surplus reaches $100, it might well be invested by the Advisory Board in federally insured savings institutions.

c. Chapter funds should be deposited only in a bank or savings institution which carries deposit insurance.

d. In case of any debts of a chapter caused by bank failure, over-expenditure, mismanagement, or worse, on part of the chapter or its officers or an advisor, the facts should be placed before the Advisory Board and with its approval be brought to the attention of the members or alumni who possibly created the debt, with requests for financial assistance. The balance of such debts should be pro-rated among the members of the chapter for the next few years and the chapter dues increased so as to liquidate the indebtedness.

e. A chapter should never be in arrears with the Association for more than the charges for the last group of initiates, and that only for a few weeks. Large unfavorable balances against a chapter on Headquarters’ books are unusual.

5. Annual Income Tax Returns

The international Association is classified as a non-profit, charitable, educational organization under Section 501(c)(3) of the Internal Revenue Code, meaning that its income is not taxed and gifts made to it are tax-deductible by the donor.

Nearly all chapters are classified as non-profit organizations under Section 501(c)(7) of the code. This means that chapter income from initiation fees, gifts, or ticket sales is not subject to income tax. However, donations and gifts made to a chapter are not tax-deductible to the donors.

Since 2008, the IRS requires all chapters to file an e-postcard form 990-N online at irs.gov. Only a chapter whose income for the fiscal year exceeds $25,000 is required to file an annual IRS form 990. If your chapter’s income normally exceeds $25,000, you must obtain a copy of form 990 at irs.gov and mail it directly to the IRS shortly after the close of your fiscal year. A sample completed 990 is available from Headquarters. Keep copies of anything you send to the IRS. See Bylaws V, 5.03 (d)(7), and VIII, 8.01 (h) and 8.05.

Even if your chapter’s income is greater than $25,000 for the current year, you may not need to file if this income amount is unusually high. Refer to the form’s instruction book which defines the criteria of having gross receipts not normally more than $25,000.

Chapters are required to pay all local and state taxes and federal excise taxes.
D. Suggestions for the Corresponding Secretary

The job of corresponding secretary ranks second in importance only to that of president, as far as Headquarters relations are concerned. The corresponding secretary is responsible for preparing and submitting all chapter reports to Headquarters quickly and accurately. Each chapter president is given a user name and password to access the online report system. The corresponding secretary should use these to submit reports online. If he or she errs in carrying out this responsibility, keys and certificates may be delivered late (or worse, with misspelled names), the chapter account with Headquarters may carry incorrect entries, and members may not receive their copies of THE BENT, among other consequences. *Fines are required to be levied by the Secretary-Treasurer for failure to submit Eligibility, Election, and Final Action Reports promptly.* (See Bylaw VIII.) It’s not about the money; the Secretary-Treasurer is charged with maintaining membership records for TBII worldwide and with seeing that new members receive keys, certificates, and copies of THE BENT as quickly as possible. *Please see that this job, above all others, is performed promptly and accurately.* The various reports called for under Bylaw V, 5.03(d), are as follows:

**Bylaw V, 5.03(d)(1)—Officer Information Report**

It is a requirement to send promptly in October each year lists of the names, addresses, phone numbers, and email addresses of the officers of the chapter and to report promptly all changes in this information which may occur during the year. Lists of Advisors are sent to chapters from Headquarters in February. They list names and addresses from the master records.

Request changes in college or home addresses at every chapter meeting, and report promptly to Headquarters.

**Bylaw V, 5.03(d)(2)—Report of Eligibility**

Eligibility, Election, and Final Action reports for undergraduate students must be submitted electronically at [www.tbp.org/tbpelig](http://www.tbp.org/tbpelig). Blank Eligibility reports for graduate students and alumni are sent to the chapter president upon request; just ask. Submit the Eligibility Report to Headquarters as soon as possible, preferably within two weeks after the start of the term. Sets of Constitutions, Information Books, etc., and bronze Bent castings, if wanted, are sent to the president only after the Report of Eligibility has been received. The Headquarters staff will acknowledge receipt of your report by email and, at the same time, give you a judgment of the technical eligibility of any graduate-student, alumnus, or eminent engineer candidates whose names were included on the special report forms. Much embarrassment and some headaches can be saved if you will wait for this technical judgment of eligibility of these candidates. Chapters sometimes elect a graduate-student, alumnus, or eminent engineer and then find that he or she either is already a member, or worse, unqualified under Constitution Article VIII.

**Bylaw V, 5.03(d)(3)—Report of Election and Catalog Cards**

Blank catalog cards are sent to the chapter in September and January. Submit the Report of Election and Catalog Card information, and mail the catalog cards as soon as the electees reply to your invitation (within 24 hours, if possible). The report and cards must reach Headquarters at least two weeks before initiation, so keys and certificates for the new electees can be ordered and delivered before initiation. *Caution:* include your initiation date in the space provided.

Certificates cannot be ordered without the initiation date since it appears on the certificates. *Never* allow anybody to fill out catalog cards for the electees. This small card is the Headquarters’ permanent record on each member; it MUST be correct, and the only way to be sure is to have each electee fill out his or her own card immediately after formally accepting your offer of membership.
Approval (by email) of the Secretary-Treasurer for you to hold your initiation, as required by Bylaw VI, 6.05(b), follows receipt of your Report of Election. *The cardinal sin in Tau Beta Pi is to hold an initiation without first receiving approval from Headquarters.* If necessary, telephone for approval, but never hold an initiation without it. Receipt of a technical judgment of eligibility of graduate-student, alumnus, and eminent-engineer candidates after submission of the special Report of Eligibility does not constitute approval for their initiation; it merely states that records and information submitted to Headquarters show these candidates to be technically eligible. The candidates still must be elected by the chapter, and approval of your Advisory Board must be given.

Bylaw V, 5.03(d)(4)—Report of Final Action and photocopy of Roll Book Signatures

This report completes the initiation-election report sequence for an election season and is the most vital report. Its purpose is to document which candidates actually were initiated and to provide information on reasons for refusal of membership by electees and the proposed date of initiation for any electees who were unable, for sickness or other equally acceptable reasons, to attend your initiation. The Report of Final Action is the last report in the membership trio and is preceded by the Eligibility and Election Reports; please provide complete information on all candidates on the Final Action Report. *No one is a member of Tau Beta Pi until his or her initiation is properly reported to the Secretary-Treasurer.* The Roll Book signatures must be photocopied and submitted as a part of the Final Action Report.

Bylaw V, 5.03(d)(5)—Convention Credentials

Delegate credentials are sent to the president in February. Elect your delegate (usually your new president) and alternate, and return the lower part of the report promptly. This report is not submitted online.

Bylaw V, 5.03(d)(6), and 5.03(d)(7)—Chapter bylaws, news, and Advisory Board actions. Please report these matters when the occasion arises.

Bylaw VIII—Observe this Bylaw carefully in order to avoid fines charged to your chapter’s Headquarters account.

NOTES—

- Keys are delivered by the jeweler directly to the chapter designee; certificates are delivered to the chapter designee, and the president’s and the secretary’s (either recording or corresponding) signatures must be added. If delivery might be made during a school vacation or the summer, the boxes will be addressed to your Chief Advisor.

- Report the election of new chapter officers immediately afterwards on the official report on the website.

PLEASE READ THE ABOVE CAREFULLY. IF YOU HAVE A QUESTION, CONTACT HEADQUARTERS ASAP.
II. ELECTION OF OFFICERS

Officers should be elected as early in the calendar year as conditions allow. Use a nominating committee to ensure a capable slate (see below and Bylaw V, 5.01). Select people who have the ability, will, and time to do a good job. Choosing the chapter’s most outstanding person as president may not be good policy if he or she is so loaded with extra-curricular activities that the leadership ability is spread too thin. Someone else might do a better job. The success or failure of the chapter depends primarily upon the officers. Whether they are effective or not, so goes the chapter. Elect a president as the Bylaws require, not co-presidents.

A few chapters elect new officers twice a year, in the spring and in mid-winter. The disadvantages of breaking the continuity of chapter leadership should be carefully weighed against the advantage of offering more members an opportunity for leadership experience. The Secretary-Treasurer recommends that chapters have only one group of officers each year.

Document and submit the election results online to Headquarters immediately, using the Report of Election of Officers.

The old officers should remain in office until the new ones are familiar with their duties. Too often the old officers drop all responsibility with the election of their successors. Use the chapter officer installation procedure (C-10)! It is a part of your job to help your successor start well. When you transfer your records, you should have a long talk with your successor. Offer all the advice you can, identifying your mistakes and explaining how errors may be avoided. Please, prepare the new president carefully.

It is an advantage to have a member of the engineering faculty serve as treasurer, who should be duly elected by the chapter with the approval of the Advisory Board. Reasons to elect a faculty treasurer:

• Because of experience and continuity, the faculty treasurer can more readily deal with the alumni who knew him or her as treasurer when they were in school; can prepare the budget more easily; can follow up with members whose accounts are not closed by their graduation securing payment from them, thus ending the “Due on Old Accounts” file, and can make suggestions to the chapter and Advisory Board based on experience.

• If the treasurer is a faculty member, he or she has an office where members may pay dues and where the chapter may keep its materials if there is no chapter room.

• Banking will be easier, and new signature cards will not be required every year.

Chapters with faculty treasurers have found it advantageous to have a student serve as assistant treasurer; the assistant handles routine operations, such as transactions of less than $50, leaving over-all supervision of financial matters to the faculty treasurer.

Nominating Committee

Most chapters can benefit from the use of a small nominating committee. It should be appointed a month or so before the meeting at which new officers will be elected. Its sole purpose is to ensure that a slate of capable, interested, potential officers is presented to the chapter for consideration. More than one person may be nominated for each office. Nominations from the floor during the election meeting must also be accepted.
III. CHAPTER OFFICER INSTALLATION PROCEDURE

On the recommendation of the Director of Rituals and the Rituals Committee, the 1956 Convention adopted the standard chapter officer installation procedure described below and ordered its regular use by the chapters. It is a duty of the retiring chapter president to plan carefully for a proper installation, to make it dignified, significant, and informative. The 1986 Convention recommended that each chapter evaluate the effectiveness of its own officer installation scheme and develop and document in its chapter bylaws a specific procedure to describe the transition between slates of chapter officers.

A. The installation meeting shall take place in accord with Bylaw V, 5.01.

B. The installation meeting may be either a business meeting or dinner, as the chapter desires.

C. There shall be a period of at least one week between the election and the installation of officers. During this period, a meeting of the outgoing and incoming officers, as a group, shall be held. The purpose of this meeting shall be the discussion of such problems of administration as are of a general nature, and the relation of each office to the others.

D. Before the installation meeting, each outgoing officer shall prepare in writing a report on the conduct of the position during his or her term of office. This report, outlining procedures and pitfalls peculiar to the chapter, shall be presented by each outgoing officer to his or her successor at the installation meeting.

E. Under the leadership of a chapter Advisor, the installation ceremony shall proceed in the following fashion:

1. The chair shall introduce the Cataloger, who, after taking the rostrum shall delineate the duties of the office as described in Bylaw V. The cataloger shall, in addition, present verbally the contents of his or her previously prepared written report relating to his or her tenure in office. At the conclusion of this report, the cataloger shall introduce his or her successor, turning over all the materials of office which may be brought conveniently to the meeting. Materials not brought to the meeting shall be listed in writing with their exact locations noted; this list, together with the written report, shall be presented to the new officer.

   The outgoing officer shall then turn the rostrum back to the chair.

2. The chair shall then recognize the remaining officers in the following order:
   
   Treasurer
   Corresponding Secretary
   Recording Secretary
   Vice President
   President

   Each officer shall follow the method of E-1, above, in vacating his or her office.
3. Additional points relative to certain offices that shall be observed are:

   a. The Treasurer shall have prepared in advance any forms necessary to the transferring of chapter funds to the new Treasurer, such as bank-account signature cards.

   b. The Corresponding Secretary shall include among the materials of office duplicate, completed sample copies of Reports of Eligibility, Election, and Final Action, Chapter Surveys, and other reports as seen fit. These reports shall be distributed to both the successor and the incoming President.

   c. The Recording Secretary shall include among his or her materials of office an accurate file of active members showing mailing addresses and exact dates of graduation. This document shall be available to the successor, the new Corresponding Secretary, and the new President.

4. At the conclusion of the preceding ceremonies, the chapter Advisor shall yield the chair to the new President who shall conduct the remainder of the meeting in the conventional fashion.
IV. MEETINGS

Most Tau Bates have fond recollections of the days spent with fellow members in TBII. Some of the principal features of membership include friendships made, fellowship enjoyed, and working relationships with faculty, alumni, and other students. In light of this, it is recommended that the total number of chapter meetings exceed the specifications of Const. Art. VI, 9, and Bylaws V, Sec. 5.01, and VI, Sec. 6.03.

It is advisable to email announcements of all meetings, particularly if the chapter is large. This requires a small expenditure of time, but it helps to obtain satisfactory attendance. Appoint the recording or corresponding secretary or another reliable member to handle the task.

Conflict in meeting times with other campus organizations is often a serious problem, particularly when a 3/4 quorum is required. Your chapter might well consider serving as coordinator of meeting schedules for all engineering groups, since its membership covers all departments. You might hold short chapter meetings during the day—at breakfast or lunch. This eliminates some conflicts, but each chapter must decide what method to use.

Each meeting needs an agenda, prepared in advance. Show your leadership. Preparation saves time and expedites all business, plans, and projects. An unprepared president can produce lethargic members.

Another prerequisite in the running of meetings is for the president to know how things are going. It is not enough to determine how things are functioning just from what transpires during the formal portion of the meeting; he or she needs to know the undercurrents! There are usually one or two members who can be counted on to render frank, unbiased criticism, comment, and counsel when asked.

Some things, for the sake of time and feelings, shouldn’t be discussed at meetings. Some members are averse to speaking during meetings. If a member is bothered about something, a direct talk is the best remedy; but if the matter is of general interest, such as an aspect of the election procedure, it might be explained in better detail at the next meeting. When there is a clash of personalities, you might confer with your Advisors.

The 1985, 1986, 1988, and 1989 Conventions considered ways to increase member awareness and retention of the secret TBII motto. The 1986 and 1989 Rituals Committees recommended that the symbolization and translation of the motto be reviewed occasionally at chapter meetings when only members are present. The 1988 Convention recommended that the Secretary-Treasurer periodically remind the chapter presidents of their responsibility to reinforce the motto in the minds of the members, while preserving its secrecy.

Finally, it is much easier to conduct a meeting properly if you are familiar with the standard business meeting procedures of Robert’s Rules of Order. A summary of Robert’s Rules, prepared by Dr. Donald S. Clark, former TBII President, is on page A-10. You should also be familiar with the quorum requirements for various types of meetings listed in Bylaw V, Sec. 5.07.
V. COMMITTEES

Certain standing committees are provided for by national Bylaw V, Sec. 5.02: Membership, Initiation, Program, and Social Activities. The respective purposes of these committees, as envisioned by the Convention which wrote the Bylaw, were to compile the eligibility records, to conduct the pre-initiation activities of the electees and the initiation ceremony, and to advance the technical and professional education of the active members. The chapter president may want at times to appoint additional committees. Effective committee chairs are essential, and the choice of the right person is often a challenge. If you choose your chairs judiciously, your job as president will be easier.

The president should place several juniors in the position of chair or co-chair—a quick way to get these persons, elected in the fall term, to orient themselves. Some will become chapter officers, and this nucleus helps to preserve continuity. Also, the president should prepare a specific, written list of responsibilities for each chair.

Committee members should be assigned with considerable thought and reflection. It’s a good idea to mix up the curricula; this will help to eliminate any subtle cliques that might form in the chapter.

Keep in close contact with your committee chairs to ensure that they function properly. Ask the chairs to report to you periodically and get additional information and instructions. This idea is useful: Carry a schedule card for each committee chair with you—often you can catch them between classes, saving time and effort. Specific suggestions for various committees follow:

A. Chapter Project Committee

TBII is in principle and by Constitution an honor society whose goals are to promote, encourage, and recognize excellence in scholarship and character in our undergraduate chapters and engineering colleges. Our goals include setting an example of scholarship and character that inspires each undergraduate to attain full potential. This is the essential function of an honor society. If a chapter conscientiously elects and initiates new members in recognition of their superior scholastic attainments and exemplary character, its purpose is being fulfilled.

Many chapters also provide services to their colleges and communities. This provides TBII a unique distinction among honor societies. Service activity is not required of our chapters, but those which have the manpower feel that such projects are entirely within and even further TBII’s visibility and that they are a responsibility of intellectual noblesse oblige. The international Association is in full agreement and encourages local chapters to carry out meaningful projects. It also recognizes that many cannot engage in service activities for sheer lack of manpower or because the membership is already making worthwhile contributions through other organizations, and by no means wants a chapter to take on projects which cannot be completed or for the sake of merely being busy. Projects should be contributions to the achievement of a definite end. Popular projects include:

1. Tutoring of underclassmen.
2. Participation in freshman orientation.
3. Participation in engineering open house or E Week.
4. Sponsorship of lectures, including Fundamentals of Engineering test reviews.
5. Faculty and course evaluation.
7. High-school visitations for engineering “recruitment.”
8. Outstanding engineering faculty and student award presentations.
9. Sponsorship of scholarships to outstanding students.
Some chapters ask electees to complete questionnaires concerning possible chapter activities and projects. Usually, meaningful projects have resulted from these sources. Deans, chapter Advisors, alumni, and others are excellent sources of ideas.

One-sentence summaries of more than 500 projects are given in the Index of Chapter Projects on the web. Further details on all the indexed activities are available free of charge from Headquarters, where all the entries are filed and cataloged.

B. Publicity Committee

Your chapter should have a publicity chair or committee whose duty it is to see that chapter activities and events are publicized in both collegiate and public press. Here are some suggestions for satisfactory publicity and public relations with the campus paper:

1. Establish friendly contact from the very start of the school year and then keep it up. The president and publicity chair and the campus editor(s) would do well to talk the entire situation over with regard to such details as space limitations, deadlines, reporting methods, etc.

2. The chapter should have done or will definitely do something constructive. Worthwhile activities are news and rate space in the paper.

3. Thank the editor for his or her help. A short thank-you note after publication of chapter news will sometimes work wonders.

If your news is of sufficient interest, by far the better method of releasing it is to call the editor and ask if he or she is interested in sending a reporter to see you. The newspaper will be more inclined to print a story than if given information in the form of a written statement.

Several things should be done in advance to make an interview a success. See that all members involved are present when the reporter arrives. Prepare a neat accurate list of significant information: name, class, engineering major, and address. Create the impression that the reporter is doing you a favor. Treat him or her with respect; it may mean the difference between a good story and a few lines of routine filler.

If your story is not important enough to call in a reporter or if it is to be sent to an out-of-town newspaper, prepare a news release using the following guidelines:

1) Use high-quality paper.
2) Type NEWS RELEASE in bold caps at the top in a font size larger than the text.
3) Include Tau Beta Pi Association, The Engineering Honor Society, the name of your chapter, and address.
4) Include a header that includes "For Immediate Release" or release on a specific date, and a contact name (president/publicity chair), phone, and email if appropriate.
5) If your story is exclusively for one paper, state that fact near your release date information, i.e. “Exclusive for the Daily Collegian.” If you submit the story to competing publications, prepare a special version and send an original to each.
6) Include a concise headline in bold—not all in caps and no longer than two lines (78 characters). Avoid using first names in the headline.
7) Double-space in the body with wide margins.
8) Keep it brief and begin with a two-sentence summary that clearly states the news and explains why it is important.
9) Provide a brief description of TBPI.

Your university or engineering public relations office may be able to assist you in preparing news releases to your initiates’ hometown newspapers and national fraternity and sorority magazines. A typical release is shown on the next page.
Heikes Initiated Into Tau Beta Pi

Eleanor B. Heikes, 112 Bentzon Drive, Wilmington, Del., has been inducted into Tau Beta Pi, the Engineering Honor Society, at the University of Tennessee. Tau Beta Pi is the second oldest honor society in the nation, the largest engineering society in the world, and represents the highest honor to be obtained by an engineering student. Members are elected on the basis of high scholarship and exemplary character.

A junior majoring in mechanical engineering, Heikes is the daughter of Kathleen and James Heikes, Wilmington, Del. She is a 2009 graduate of West High School. A member of Pi Tau Sigma honor society, she is also president of the Society of Women Engineers. While at the University of Tennessee, she has served as vice president of the Student Government Association and has been a captain of the varsity swimming team.

Finally, the Publicity Committee should be responsible for sending interesting news items about the chapter, its officers and members, and prominent alumnus members to either Headquarters or the District Director. Some chapters have the college engineering and alumnus magazines sent to Headquarters in exchange for a subscription to THE BENT.

C. Award and Prize Committee

It is recommended that your chapter award a jump drive, engineer’s handbook, or other suitable prizes to the outstanding underclass engineers. If standings can be determined, this should be done at an open meeting, commencement, or other time when such honors are publicly announced. Otherwise such awards should be made early in the fall. Other awards—for excellence in humanities course work or for special essays—may be offered annually. It is an excellent idea to present a gift or certificate of appreciation to retiring Advisory Board members and to write letters to the dean and to their department heads expressing your appreciation for the service of your Advisors.

Material that might appropriately be included in speeches made at the presentation of awards may be found in the Preamble to the Constitution and in the Eligibility Code. Details about individual chapter awards must be decided by each chapter. The president should write in detail the method of selecting the recipient, making the presentation, etc., and place such instructions in this section.

Award Certificates

The 1970 Convention encouraged chapters to recognize students and faculty for outstanding accomplishments. Attractive 8.5” x 11” blank award certificates with only the TBJI name and Bent at top and gold seal at lower left are available from Headquarters at a nominal cost. These certificates may be printed by computer at no cost to the chapter. Frames and plaques are available locally.
Certificates of Accomplishment may be awarded by the chapters for a variety of achievements:

1. Physically handicapped engineering students who did excellent scholastic work but narrowly missed qualifying for membership.
2. Outstanding work on undergraduate publications.
3. Superior teaching—faculty or student, engineering and non-engineering.
4. Extraordinary service to the chapter.
5. High scholarship, e.g., outstanding freshman award, outstanding sophomore award, etc. (example is below).

The Massachusetts Alpha Chapter of the Tau Beta Pi Association recognizes

Athena Demetry
of the class of 2011 for having been chosen as the
Outstanding Engineering Sophomore
at Worcester Polytechnic Institute
on the basis of her academic achievement, proven leadership, and sterling character.
Presented at Worcester, Massachusetts,
This 6th day of December 2008.

Massachusetts Alpha Chapter President Dean of Undergraduate Studies

D. Banquet and Dinner Committee

Most chapters celebrate formal initiation banquets with dates, spouses, and parents. These are excellent means of bringing TBPII to the attention of non-members and have the basic purpose—to honor the new members publicly as the ritual ceremony honors them privately. Planning is the key, and what dinner isn’t complete without a good tip or two?

Tip #1: Guarantee. Nothing is sadder than watching your chapter treasurer write out a check for more prime ribs than were served because the guarantee was too high. Check with the dining room on its guarantee guidelines. Most facilities are prepared to serve 5% over the guarantee. Also ask about the lead-time the dining room requires. You must normally give a guarantee from 24-to-48 hours in advance.

Tip #2: Tickets. A good way to help establish a guarantee is to distribute tickets a week before the banquet. Besides selling tickets to your members, initiates, and guests, you should contact local TBPII alumni, including family, and encourage them to purchase tickets. Before printing tickets, includes taxes and tip in the price. This avoids the embarrassing situation of passing the hat to raise the extra cash to pay for the meal.
Tip #3: Speaker. Show originality in planning your TBII banquet program. We recommend that banquet addresses be on non-technical subjects. You are much more likely to have strong attendance if you can promise something more than just another engineering lecture. Non-technical addresses are in accord with the “spirit of liberal culture” emphasis expressed in the Preamble to the Constitution. Call on your Advisors or District Directors for possible speakers.

Tip #4: Location. Much as you would like to hold your banquet at the Ritz Plaza, remember that you are inviting the faculty and they should be able to afford it too. Some chapters hold banquets on campus, because they get more food for less cash.

After the spring initiation, one large annual initiation banquet that honors both the spring and fall electees is economically attractive to many chapters. This practice may or may not work for your chapter.

You will want to check on the availability of a private room, its size, and audio-visual equipment. Someone should inspect the room set-up an hour or so before the dinner to ensure that everything is in place.

Tip #5: Head table. Certainly you’ll want the master of ceremonies and the main speaker at the head table. Others who are important to the chapter—university administrators, Advisors, and officers—should be publicly thanked by asking them to sit at the head table and be recognized by the emcee. Notifying them ahead of time to find their table saves the worry of locating them just prior to the dinner.

Inform your District Director of your banquet and initiation dates. He or she will be happy to say a few words of welcome to your initiates on behalf of the Association.

Tip #6: Joint dinners. Many chapters have found joint dinners with other groups desirable. Joint meals help to attract larger attendance and better speakers; they sometimes result in lower costs per meal served, and in most cases, they eliminate a financial strain on the members by excluding them from the privilege of attending two engineering society banquets. An example of joint dinners is a combined TBII/Eta Kappa Nu/Pi Tau Sigma, etc., function. Combined undergraduate and alumnus chapter meetings, and joint banquets for several TBII chapters in a particular locality are held frequently. Your District Director may be able to help you set up an “inter-chapter” dinner.

E. Nominating Committee

Most chapters can benefit from the use of a small nominating committee. It should be appointed a month or so before the meeting at which new officers will be elected. Its sole purpose is to ensure that a slate of capable, interested, potential officers is presented to the chapter for consideration. More than one person may be nominated for each office. Nominations from the floor during the election meeting must also be accepted.
CHAPTER RECORDS

Remember those immortal words, “Documentation is the name of the game.” This applies just as much to TBII operations as it does to engineering projects. It is critically important to keep correspondence, files, and other chapter materials well organized to make the job of leading the chapter easier for you and your successors.

All official transactions and correspondence, including emails, should be printed and copied. If a letter or email has features of general interest, email copies to Headquarters and your District Director. Every letter received should be filed for business-like operation.

If the chapter does not have suitable files, some kind of proper system should be installed without delay. The following has been found satisfactory as the beginning of a more elaborate system. A fiber or metal file box may be obtained at low cost. The box should contain a dozen or more standard manila, thumb-indexed folders for 8.5” x 11” sheets. The folders should be removable and extras purchased from any book store.

The folders may be titled: (1) Current Business, (2) Prior Year’s Business, (3) Chapter Projects, (4) Chapter Surveys, (5) Initiation Data, (6) Membership, (7) Eligibility Records, (8) Misc. This file is light, and the president can easily carry it to meetings. Thus at all times the president has vital information at his or her fingertips. As the file becomes crowded, the oldest records are removed to more permanent quarters. At the end of each year, “Last Year’s Business” is put in a folder marked “Business, 20—” and stored; current matters are moved to “Last Year’s Business,” and you are ready for a new year. The membership file, with full names, email/local addresses, phone numbers, classes, dates of election, will prove invaluable. The same is said for eligibility records, which contain complete data on scholastic standing. (Always save these!)

A private chapter room is the ideal location to keep the permanent records, initiation equipment, and other materials. This room often becomes a headquarters for the officers and a gathering place for the chapter members. If a private chapter room is not available, suitable storage space can often be found in the office of an interested faculty member. Such chapter properties should not be left to the safe-keeping of a student member, especially during vacations. Perhaps the chair of the Advisory Board could be the regular custodian of the TBII ritual.

The recording secretary should have a complete up-to-date inventory of all chapter equipment and property, and the inventory might be kept in this manual. (See Bylaw V, 5.01(c).) The inventory sheet should provide a brief description of the articles listed, their locations, approximate value, and origins. Issues of THE BENT and THE BULLETIN (pdf files are at www.tbp.org) for the last three years for use by your members should be included in your chapter files, as specified by B V, Sec. 5.03(a).

A file that all chapters should have is one containing the job descriptions for the chapter officers. You may build from the basic descriptions given in this manual on pages C-1 to C-8 to include the duties traditionally assigned to your chapter’s officers. Reference to step-by-step procedures for accomplishing routine, recurring tasks will save valuable time, giving your officers more time to spend productively.

Although not required, it’s a good idea to take a group photo of the chapter and preserve it. Many chapters use a page in the college yearbook for this purpose.
CHAPTER SURVEY AND PROJECT REPORTS

One important yearly task is the compilation of the annual Chapter Survey of activities. Including documentation of each chapter project, the survey is used as a diagnostic tool. It informs Headquarters of a chapter’s activities and projects in order for the staff to detect problem areas and recognize the positive aspects of the projects for the chapter. A project is any activity not specifically required for normal business that is organized with a clear goal, approached in a structured manner, and conducted either in part or in its entirety by members and/or candidates.

The Chapter Survey and project reports should be used to provide a smooth transition for both your succeeding officers and the Advisory Board. In addition, they provide factual information that is used by the Convention Award Committee in its evaluations. The survey is due, along with your senior design projects and final exams, at the end of the school term. Remember to keep a copy of the survey and project reports for your chapter files.

You can prepare most of the project reports early by writing descriptions as projects are undertaken, leaving you more time for your other year-end activities.

To see the format to use in documenting your projects, refer to the Chapter Project Report on the next page. These are routinely completed by the chapters in March and should be downloaded from our website (www.tbp.org). The 1987, '96, and '99 Convention Committees on Awards offered these guidelines:

1. Chapters should identify the target audience in each project report.
2. Chapters should indicate which projects are new and which are old.
3. Chapters should specify the total number of “person-hours” spent in planning/organizing each project and actual participation in each project. Exact data on the number of active members in each chapter project should also be provided. The 1991 Award Committee requested that a list of participants be included with each project report. Please indicate the project area covered. To be considered for a Project Award, your chapter must have projects in each of these five areas: Community/Liberal Culture, University/College, Chapter/Social, Profession/Engineering, and Educational/Professional Development.
4. Chapters should print the project reports using the same format as the official report.
5. Chapters should present well detailed project summaries and relevant supplementary material in a professional manner. Chapters should not include unnecessary backup materials (e.g., agendas, minutes, etc.). However, if this information is added for archival purposes, place it in an appendix. Pertinent documentation might include photographs and letters from faculty and staff.

Articles on the most interesting projects may appear on the website or in THE BENT. There is no need to wait until the end of the year to submit summaries of your unique projects for publication. They may be sent anytime along with photos (high-quality, 300 dpi digital images emailed to tbp@tbp.org are preferred).

Rev.—August 2004
C-19
The Tau Beta Pi Association
Chapter Project Report

INSTRUCTIONS: Please complete each of the seven sections below. Any additional information which may be helpful to another chapter would also be appreciated, but do not send extraneous material that would not be useful to other chapters.

<table>
<thead>
<tr>
<th>Project name: ______________________________</th>
<th>Date(s) of Project: ____________</th>
</tr>
</thead>
</table>

Project area: __ Community/ __ University/ __ Profession/ __ Chapter/ __ Education/ Liberal Culture College Engineering Social Prof. Dev.

Number of persons who participated in this project
(Please attach a list of names.)

| Members: ___________ | Electees: ____________ |

Hours spent on this project. Organizing: ____________ Participating: ________________

DESCRIPTION:

I. General Description: _______________________________________________________
__________________________________________________________________________
__________________________________________________________________________

II. Purpose & Relationship to Objectives of TBP: __________________________________
__________________________________________________________________________
__________________________________________________________________________

III. Organization & Administration: (in conjunction with another group?) ___Yes ___ No
__________________________________________________________________________

IV. Cost & Personnel Requirements: ____________________________________________
__________________________________________________________________________
__________________________________________________________________________

V. Special Problems: _________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

VI. Over-all Evaluation/Results (Be Specific): _________________________________
__________________________________________________________________________
__________________________________________________________________________

VII. Index of Exhibits: _______________________________________________________
__________________________________________________________________________
__________________________________________________________________________
CONVENTION DELEGATE INFORMATION

The TBII Convention is the legislative body of the Association and the final court of appeals in matters of interpretation of the Constitution and Bylaws and of discipline. It elects the Executive Council and grants new chapters. The Convention is made up of one delegate from each of the collegiate and alumnus chapters, the members of the Council, and national officers. The event is financed by assessment on the initiates of each chapter in the previous year and by investment earnings of the Convention Fund.

Chapters are urged to send their presidents as delegates, who are the logical officers to implement the many fine ideas discussed at the meeting.

In February, the Secretary-Treasurer sends to every chapter president a call for the election and reporting of its delegate and alternate. An official credentials report is included with this letter; and it must be completed, signed, and the lower half returned to Headquarters. The delegate retains the upper half for presentation at Convention registration.

In July, the Secretary-Treasurer sends to all known delegates the first major letter about the Convention, which presents the agenda, explains how expenses are met, and contains information about travel/hotel arrangements. It requests that information for each additional member planning to attend should be submitted online.

Additional Advisors and student representatives are encouraged to attend the Convention with the official delegate. Most of their additional expenses must be borne by the individuals or chapters themselves; however, some funds from the national Society are available for partial or on-site expenses of Advisors and 20% reimbursement of certain air travel expenses of one alternate per chapter. Convention charges are kept to a minimum to encourage attendance.

During the summer, committee assignments are made by the Secretary-Treasurer, and committee members are instructed by letter of their duties. Background information for any committee is available upon request.

In August, the Secretary-Treasurer sends information about the Chapter Development program of the Convention. This consists of:

• The Convention display, presenting TBII history and programs.

• District Meetings, where all chapters meet to exchange ideas and plan the year’s intra-District activities and;

• Interactive Chapter Exchange, where representatives of chapters with similar characteristics discuss their unique problems;

In August, the Secretary-Treasurer sends a final letter with last-minute data on the agenda and final travel instructions. Each attendee must submit a travel plan online.

Finally, the official minutes are posted for all delegates who are to use them in reporting the Convention to their chapters, as required by the Bylaws.
HOSTING THE NATIONAL CONVENTION

The national Convention is held annually each October. A measure of its importance to the Association is its cost: total expenses range from $240,000 to $335,000, depending upon location. These figures include the expenses of the collegiate chapter delegates only, not of alternate delegates, chapter Advisors, alumnus-chapter delegates, and national officers.

Decisions as to future sites are made by the Convention itself three years in advance (Const. III, Sec. 2(i)). Many Conventions were held near the centroid of Tau Beta Pi’s chapters (which is in Illinois) in order to minimize delegate travel expenses. Most delegates travel by air, and their allowable travel expenses are stated in Bylaw I, Sec. 1.06. On-site delegate expenses are lower if the Convention Headquarters is a campus facility rather than a commercial hotel. A campus location usually offers a collegiate atmosphere to our liking.

It is an honor to be selected as Convention host. The host chapter must expend time and energy, through its members, on the work of planning and conducting the meeting; but it need not spend its own money. Blood, sweat, and tears—but no cash! The Convention is completely self-supporting. Donations are always acceptable from host institutions, local industry, and nearby alumni; but they need not be solicited.

If your chapter is interested in becoming a Convention host, consider the following:

Benefits to the Host Chapter. Besides providing the utmost in service to TBII, a host chapter advances the interests of its institution and community in a major way. A Convention brings 500 people, most of them outstanding engineering students from 237-plus colleges, for a close look at the host school. This is a valuable public-relations opportunity for the institution. All of the host chapter’s members have the unique chance of attending a national Convention.

Responsibilities of the Host Chapter. The host chapter must have the support and cooperation of its Advisory Board, dean of engineering, and its institution’s administrative officials. Even a small chapter, augmented by its fall electees, probably has enough members to get the job done. Two or more chapters working together as joint hosts may provide additional manpower. Your District Directors can provide advice and assistance.

A Convention site must have housing, meeting, dining, and transportation facilities for some 500 Tau Bates. The largest meal is the final banquet where the out-of-towners are joined by the host chapter’s own members and initiates, local alumni, and guests. The total attendance at this major function can range up to 600. Other meal functions require facilities only for the out-of-town group plus up to 25 local people. Room requirements range from full-business-session groups of 400 to small committees and seminar groups. At least 16 simultaneous small meeting rooms are required. Housing must be available for all out-of-towners; typically, about 270 rooms are required, most of them accommodating two delegates, some for three persons, and a few singles for the handicapped or those with special health problems.

Assistance from Headquarters. A comprehensive Convention handbook is given to chapters whose invitations have been accepted. It contains detailed answers to many questions, and it outlines the procedures which have been found desirable through the experiences of previous host chapters. The Convention arrangements chair is the student member of the host chapter who is the chief planner and liaison with Headquarters. He or she will attend, at Tau Beta Pi expense, the Convention immediately preceding the one which his or her chapter will host to observe the details of the annual meeting. The Secretary-Treasurer and Assistant Secretary-Treasurer communicate weekly with the host’s key people and are always ready to answer questions and give assistance. They visit the host chapter in the spring prior to the Convention and spend two days reviewing facilities and nailing down all logistical details.
**Submitting an Invitation.** Chapter invitations for a national Convention should be sent by June 1 to the Secretary-Treasurer who will refer them to the next Convention Site Committee. Invitations should be in the form of a letter and should verify by endorsement the support of the chapter’s Advisory Board and school administrators. Additional letters of support may be included along with illustrative material on the facilities planned for our use. Proposals may be accompanied by slides, photographs, and advertising brochures. In 1999, the Executive Council decided to reimburse the travel and on-site expenses of one alternate delegate of a chapter presenting a formal invitation.

Several chapter invitations may be extended, but only one can be chosen for any year. The Site Committee interviews representatives of each inviting chapter and makes its recommendation to the entire Convention. The Convention then votes to select a site. TBII is deeply grateful to all chapters that submit invitations.
THE R.C. MATTHEWS OUTSTANDING CHAPTER AWARD

The 1956 Convention established an annual Outstanding Chapter Award to encourage high-grade work by the chapters in both routine and special affairs. In 1978, shortly after Secretary-Treasurer Emeritus R.C. Matthews died, the award was named in his honor by the Executive Council. Winners are now known as the R.C. Matthews Outstanding Chapters. Rules for the competition, adopted by the Convention, are as follows:

I. The annual award shall be based on:

   A. Internal and external chapter projects and activities; and

   B. The accuracy, completeness, and promptness of chapter reports to Headquarters.

II. The Secretary-Treasurer and Assistant Secretary-Treasurer shall comprise a pre-judging committee. They will choose approximately ten chapters whose names shall be submitted to the final judging committee at the Convention according to the following criteria:

   A. A report concerning the accuracy, completeness, and promptness of chapter reports to Headquarters.

   B. A report concerning the extent and quality of chapter projects and activities evaluated in relation to the number of eligible candidates.

   C. A Chapter Survey of reasonable length consisting of a concise description of pertinent chapter activities, including the official TBPI Chapter Survey report.

III. A final judging committee, comprised of Convention delegates appointed by the Secretary-Treasurer, shall select the R.C. Matthews Outstanding Chapter and give honorable mentions as it deems appropriate.

   A. The committee shall consist of delegates from various sized chapters, from various parts of the country, and from schools of different types (i.e., commuter, residential, university, institutes of technology). No member of the committee should be affiliated with any of the chapters competing for the award after the pre-judging.

   B. The committee shall be provided with the materials described in Section II above and may eliminate from consideration any chapter whose Chapter Survey is deemed inappropriate in length or content. The committee will meet in closed session with all material and proceedings considered confidential. The Advisor to the committee shall be a national officer not involved in the pre-judging.

IV. The award:

   A. Shall consist of a suitably inscribed bronze plaque; honorable mentions shall be appropriately engrossed and mounted certificates.

   B. The winners shall be announced annually at the Convention, with appropriate ceremony, and the awards shall be prepared and delivered to them ASAP by the Secretary-Treasurer.

   C. The winning chapter and the honorable mentions shall be reported in THE BENT and THE BULLETIN to pay honor to them and to encourage other chapters to perform with excellence.

Rev. — July 2002
THE R.H. NAGEL MOST IMPROVED CHAPTER AWARD

The 1971 Convention established an annual Most Improved Chapter Award, based on significant chapter improvements in the areas below. The 1983 Convention named the award in honor of Secretary-Treasurer Emeritus Nagel.

1. Quality and promptness of reports to Headquarters.
2. Chapter financial status.
3. Chapter activities and projects.
4. Ratio of the number of candidates initiated to the total number of candidates elected according to chapter standards.

These criteria will be judged from the Chapter Survey and a report written by the chapter enumerating its improvements.

The Secretary-Treasurer and Assistant Secretary-Treasurer shall comprise a pre-judging committee to choose up to ten chapters whose names shall be submitted to the Convention Award Committee.

The Convention Award Committee will determine the winner and appropriate honorable mentions by comparing the present year’s survey and chapter report with those of the previous two years.

The method of selecting finalists used by the 2010 Convention is as follows: $X_i$ represents the value of the score during a current three-year period, with $X_0$ representing the first year of the three year period. $X_{AVG}$ represents the mean value of the scores over the three year period. $DX_{ij}$ represents the change in the score between the $i_{th}$ year and the $j_{th}$ year. If $DX_{ij}$ is positive, then the score is subtracted from the total score. The total score for a given section (Report of Project) is calculated as follows:

Selection Score = $X_0 - X_{AVG}$

If $DX_{0 \rightarrow 1}$ or $DX_{1 \rightarrow 2} > 0$, then Selection Score = $-(DX_{0 \rightarrow 1} \text{ or } DX_{1 \rightarrow 2})$

The score from each portion is then added for a total score for each chapter that is to be used by Headquarters to select qualifying chapters. This method takes advantage of the rolling three-year average of the scores, while also taking into account the initial scores over the three-year span.

The award and the honorable mentions shall consist of appropriately engrossed and mounted certificates.

The winners shall be announced annually at the Convention, with appropriate ceremony, and the awards shall be prepared and delivered to them as soon as possible by the Secretary-Treasurer.

Rev. — February 2011

C-25
THE J.D. FROULA MOST IMPROVED MEMBERSHIP AWARD

The Headquarters staff and Executive Council established a Most Improved Membership Award, based on significant improvements in chapter membership performance, and named the award in honor of Executive Director and Secretary-Treasurer Emeritus Froula at the 2011 Convention.

Mr. Froula started a campaign challenging chapters to “Initiate One More” electee than in the previous academic year. He encouraged them to do so, but to conduct chapter elections without compromising Tau Beta Pi standards. Membership experienced a steady increase during those years, and the Most Improved Membership Award recognizes these efforts.

The presentation of the 2011 inaugural J.D. Froula Most Improved Membership Award was made to Missouri Beta, with honorable mentions to Arizona Gamma, Georgia Alpha, and Nevada Alpha. This competition recognizes the chapter that has shown the largest, steady increase in the number of electees initiated during the previous three years. Other considerations include the percentage increase and ratio of initiates to electees.
CHAPTER PERFORMANCE SCHOLARSHIP PROGRAM

The Executive Council believes that it is important for TBII to conduct a national scholarship program to support undergraduate engineering students and to improve the visibility of TBII at both the national and campus levels. This purpose is being served by both the TBII Association Scholarship Program and the Chapter Performance Scholarship Program.

The objective of the Chapter Performance Scholarship Program is to provide a structure whereby collegiate chapters may receive funds to award scholarships to undergraduate students on their campuses. The funds are awarded to chapters based upon their performance in TBII projects. All chapters have an equal opportunity every year to earn a Chapter Project Award.

The Council established the performance-based Chapter Performance Scholarship Program as a trial in 1995 to award scholarships to students at selected engineering colleges with Tau Beta Pi chapters and made it permanent in 1997. The annual budget for the program is established by the Council. The amount of each scholarship—set at $500 by the Council in 1995—may be adjusted by Council action, as appropriate, based on available funds.

Procedure:

1. A collegiate chapter shall be awarded a scholarship after earning three consecutive Chapter Project Awards.

2. An additional award shall be made for each consecutive Project Award earned after the initial three.

3. If a chapter does not earn a Project Award in one year, the requirement for three consecutive awards starts over.

4. Scholarship Awards shall be announced annually at the Convention.

5. The criteria for awarding the scholarship(s) and the selection of the undergraduate engineering student candidate(s) are to be a joint effort between the local chapter and the college dean or designated representative.

6. The chapter’s college of engineering will be encouraged to match the funds provided by TBII.

7. Upon notification of the name and address of each undergraduate engineering student scholarship recipient, TBII shall issue a check to the individual. For ease of administration in some cases, such as matching awards from the dean or multiple awards to a single chapter, TBII may transfer funds to a general scholarship fund of the college when notified of the name(s) and address(es) of the recipient(s).

8. Each awarded scholarship shall be named The Tau Beta Pi Scholarship for (insert chapter name).

Approved by Executive Council—March 1998
Named by 1998 Convention—October 1998
Rev.—August 2009

C-27
STUDENT ASSISTANCE FUND

Through the interest and generosity of Cyril C. Young, Illinois Alpha ’24, an endowment fund was established in 1992 to make money available to student members of Illinois Alpha and other TBII chapters who would otherwise be without sufficient financial resources to remain in college. Repayment is not required, no interest is charged on the financial aid provided, which is paid to the student(s) in either monthly installments during the school year of approximately $100 or a single lump-sum payment, and grantees are requested to help others in need should they become financially secure. Each student is limited to $1,000 in aid.

The TBII Association will provide the special, personalized assistance, so far as fund earnings permit. Application for special assistance funds must be made in a letter addressed to the Secretary-Treasurer, witnessed by the chapter president and treasurer and by one chapter Advisor. Selection of the student(s) will be made in a prudent way consistent with TBII policies. The Secretary-Treasurer will recommend selections to the President of the Association who shall approve or disapprove each application.

STUDENT LOAN PROGRAM

TBII operates a Student Loan Program for two purposes: To make money available to student members who would otherwise be without sufficient funds to remain in college; and to allow new members who cannot afford the initiation fee at the moment to borrow the fee to fulfill their financial obligations to their chapters and the Association.

We emphasize that no one should refuse initiation for financial reasons. We suggest that chapter presidents inform eligible students of this fact and ask those with any financial concerns to see you privately. (See page B-18.)

The program is not advertised widely to avoid encouraging loan applicants who can find other sources of financial aid, because TBII’s available loan funds are limited. An information sheet stating all details of the loan program currently in effect is mailed to each president in early October. The interest rate on student loans is 6 percent per annum; loan amounts vary from $25 to $2,500 and must be repaid within three years.

Each request for loan application must come directly from the individual borrower to Headquarters. This procedure is important because of the need to impress upon borrowers the fact that their indebtedness is to the Association, not to their chapter. Applications may be downloaded from the website at tbp.org/chapters/resources.

The appropriate application (either Undergraduate, Graduate, or Initiation Fee) must be completed by the borrower, co-signed by a responsible U.S. citizen of legal age (preferably the borrower’s parent or guardian), and signed by the borrower’s department head and chapter officers. The completed application and a promissory note signed by the borrower and the co-signer must be sent to the Secretary-Treasurer for certification of the borrower’s membership in TBII. A check should be received by the student within two weeks of certification.

Each chapter should maintain a file containing the information sheet and copies of the three different applications and the single promissory note, available on the website.

The basic principles of TBII’s Student Loan Program are stated in Constitution Art. XIII, and the major procedures of operation of the program are stated in Bylaw XII. A brief history of the program is printed in the Information Book.
FELLOWSHIP PROGRAM

The Fellowship Program is TBIT’s initial major annual project for the advancement of engineering education and the profession. Fellowships are available either with or without stipend. Because of funds made available by generous alumnus contributions, the stipend was raised to $10,000 in 1995. Approximately 35 Fellows are selected annually by the Fellowship Board from 200-250 applicants. Students and alumni may apply. Any electee who will be initiated before the application deadline (January 31) may also apply.

Applications are available on the website beginning each November. Awards are announced in April. Fellowship income is considered taxable by the IRS, but degree candidates may exclude such income as amounts required for tuition, books, supplies, and equipment.

RAYMOND A. AND INA C. BEST FELLOWSHIP

Through the interest of the Best family, a trust fund in memory of Ina C. and Raymond A. Best, NY’33, was established in 1995 for a fellowship for a graduate engineer/member to be used exclusively for the purpose of studying business administration at Rensselaer Polytechnic Institute and for acquiring a master’s degree in business. Application is made online and filed with the Director of Fellowships by January 31. The amount of this special award is approximately $10,000, payable in 10 monthly installments.

SCHOLARSHIP PROGRAM

The Tau Beta Pi Scholarship Program was established in 1998 to advance engineering education and the profession. Stipends of $2,000 are made to 100-234 or more members for their senior year of full-time engineering study. Applications are available on the website beginning each November. Any undergraduate member or electee who will be initiated and reported to Headquarters before the deadline for application on March 1 may apply. Awards are announced in April.
GREATER INTEREST IN GOVERNMENT PROGRAM INFORMATION
Tau Bates Serving the Educational and Public Communities

CHAPTER PROJECT GRANTS

Through the interest and generosity of an alumnus member of TBII, Frederick A. Faville, Illinois Beta ’19, an endowment fund was established in 1969 to pay for awards in a program of Greater Interest in Government. The original feature of the program was an annual national student essay contest on the subjects of American citizenship, American government, or the responsibility of engineers to take an active part in civic and governmental affairs. (The 1981 Convention discontinued the contest.)

To promote student interest in government and civic affairs further, the 1980 Convention revised the program to provide awards in the form of chapter project grants. The grant money is to be used to help pay expenses of chapters wishing to pursue projects that serve their local communities. In such projects, not only does society benefit from the students’ efforts, but participating students also benefit from the experience they gain working with public officials and institutions. The maximum grant will be $750. If multiple chapters propose a joint project, the maximum grant will be $750/chapter.

Projects involving local primary and secondary schools are encouraged, especially if they promote the engineering profession or the importance of a strong math and science education. Projects that primarily benefit the Chapter’s college or university are ineligible.

Proposals for grants shall be judged by the Executive Council using these guidelines:
1. Projects should emphasize engineering service to society.
2. Originality, innovation, and potential impact of the project on the local community are important factors.
3. Projects should involve a significant portion of the active membership of the Chapter.

Written proposals shall include:
1. A description of the project, why it is needed or what service it will provide, and pertinent background information.
2. An outline of previous activity by the chapter in this area, if any.
3. The specific goals and plans for implementation of the project.
4. Time schedule of the project.
5. An itemized budget request.
6. The approximate number of members participating and the name of the person to be responsible for the work as project director.

Proposals shall be as concise as possible in meeting these requirements. The chapter president must sign the proposal. If the proposal is for the following school year, the incoming president must also sign it. The presidents of all chapters must sign proposals for joint projects. There is no deadline for receipt of proposals at TBII Headquarters. A chapter may submit more than one proposal.

Chapters submitting proposals shall be notified no later than two weeks after a decision by the Executive Council. Publicity for approved projects by TBII shall be scheduled and prepared by the Executive Director. Grant payments shall be made for individual or group projects to chapters on a schedule appropriate to the project budget.

Each chapter receiving a grant shall prepare a final report on its completed project within one month of completion, but no more than one year after receiving the grant. The report shall be submitted to the Executive Director. The report shall describe the project work accomplished and account for use of the grant. A summary of the report shall be published in THE BENT. Failure to submit a final report will result in a $25 fine levied against the chapter or against each chapter conducting a joint project.

Rev.—October 2008
The TBJI MindSET Program was established as the organization’s contribution to the nation’s focus on the need for better preparation of K-12 students in math and science, and increasing the numbers of those who are prepared to pursue careers in math, science, engineering, and technology (the MSET of MindSET). This is needed in order to maintain the nation’s competitiveness in the global marketplace. Two critical points within the K-12 system that are targeted are the 8th and 12th grades, where we seek to increase completion of Algebra 1 by the 8th grade, in order to improve completion of calculus by the 12th grade. Our strategy is to use a hands-on (kinesthetic) approach for classroom instruction and lab demonstration of math and science concepts and applications.

To promote chapter involvement in K-12 math & science projects through MindSET, the Executive Council established a trial program in 2009 to provide awards in the form of chapter project grants. The grant money is to be used by chapters to develop engineering laboratory modules, and/or assist chapters in defraying the cost of establishing MindSET projects, and pursuing projects that serve their local K-12 community. In such projects, not only does society benefit from the TBJI students’ efforts, but participating TBJI students also benefit from the experience they gain working with public officials and institutions. The maximum grant will be $1,000. If multiple chapters propose a joint project, the maximum grant will be $1,000/chapter.

Projects must be designed to assist students from the local primary and secondary schools to gain a better understanding of math and science applications and promote the importance of a strong math and science education. Projects that primarily benefit the chapter’s college or university are ineligible. Proposals for grants shall be judged by the National Management Committee using the guidelines below (and forwarded to the Council for approval):

1. Establishment of a MindSET Chapter Implementation Team (CIT).
2. Consistency of project emphasis with MindSET goals and objectives, including service to society, with a focus on increasing knowledge related to engineering and the STEM disciplines.
3. Measurable impact of the project on the local K-12 community is an important factor.
4. Involvement of a reasonable portion of the active membership of the chapter in the project.

Written proposals shall include:
1. A description of the project, brief school-district information, service it will provide, and other pertinent background information.
2. An outline of previous activity by the chapter in this area, if any.
3. The specific goals and plans for implementation of the project.
4. Duration, activities, and time schedule of the project.
5. An itemized budget request.
6. The approximate number of members participating, the name of the person to be responsible as project director, and the name of a TBJI local contact who will assist with meeting MindSET requirements.
7. Number and grade levels of students to be impacted by the project.

Proposals shall be as concise as possible in meeting these requirements. The chapter president must sign the proposal. If the proposal is for the following school year, the incoming president must also sign it. The presidents of all chapters must sign proposals for joint projects. A chapter may submit more than one proposal. No deadline for receipt of proposals at Headquarters has been established.

Chapters submitting proposals shall be notified no later than two weeks after a decision by the Executive Council. Grant payments shall be made for individual or group projects to chapters on a schedule appropriate to the project budget. Publicity by TBJI for approved projects shall be scheduled and prepared by the Executive Director.

Each chapter receiving a grant shall prepare a final report on its completed project within one month of completion, but no more than one year after receiving the grant. The report shall be submitted to the Executive Director. The report shall describe the project work accomplished and account for use of the grant. Engineering modules designed as a part of this grant must comply with design and formatting guidelines provided by MindSET, and must be submitted for review and inclusion in the MindSET Module Bank. In addition, chapters are required to submit photographs of MindSET activities with their reports. A summary of the report shall be published in The BENT.

Rev.—October 2009
The **Engineering Futures Program** was founded in 1988 in response to a need to provide engineering students with training in the *soft skills* necessary for success in the workplace but rarely included in engineering curricula. Five modules comprise the curriculum described below. The modules are listed in their logical order but can be presented in any order. A module typically lasts between three and four hours.

**Engineering Futures sessions**, which can include one or more modules, are usually conducted on weekends. However, modules may be adapted to fit shorter time frames and may be conducted at other times, depending on Facilitator availability. The optimal number of attendees at a session is 15 to 20 but if you can guarantee more attendees, arrangements will be made to provide additional Facilitators. Headquarters will provide a Facilitator for your session and pay for his/her travel expenses. Expenses for the meeting room, equipment, and any meals you provide as part of your chapter’s session are the responsibility of your chapter.

Your chapter may schedule a session by completing and submitting an online request at [www.tbp.org/chapters/resources](http://www.tbp.org/chapters/resources) to Headquarters. Your Facilitator, assigned by Headquarters, will communicate with your chapter representative about the specific arrangements for the session. Please contact the Headquarters staff if you have any questions.

**ENGINEERING FUTURES CURRICULUM**

**People Skills—Interpersonal Conflict Resolution** *(This module comprises two sub-modules, Basic People Skills and Advanced People Skills, which are usually conducted in separate sessions. Basic is a prerequisite for Advanced. Allow four hours for Basic and three hours for Advanced.)*

What is covered?
- Communicating interpersonal problems.
- Determining the root cause of a problem.
- Distinguishing between motivational and ability problems.
- Recognizing and solving emergent problems.

**Team Chartering—Team Development** *(Allow three hours for this module.)*

What is covered?
- The role of a team.
- Stages in a team’s growth.
- Developing a team charter.
- Team-building exercises.

**Group Process—Planning and Conducting Effective Meetings** *(Allow four hours for this module.)*

What is covered?
- When to hold a meeting, who should attend, what should be covered, and how it should be organized.
- Meeting roles and processes.
- Keeping meeting attendees on track.
- Closing a meeting.

**Analytical Problem Solving—Solving Problems Using Teams** *(Allow four hours for this module.)*

What is covered?
- The problem-solving process.
- Generating ideas through brainstorming.
- Creative-thinking exercises.
- Clarifying and reducing a list of ideas
- Identifying and implementing a problem solution

**Effective Presentation Skills** *(Allow four hours for this module.)*

- Overcoming the fear of public speaking.
- Impromptu speaking.
- Formal-presentation preparation.
- The design of visual aids
- Group presentations.

Rev. — August 2009

C-32
LAUREATE PROGRAM

The Laureate Program is conducted annually to recognize up to five TBII student members who outstandingly exemplify the “spirit of liberal culture in engineering colleges.” Award categories include arts, athletics, diverse achievements, and service. TBII chapters may nominate any of their student members as Laureate candidates.

Detailed information about Laureate nomination and selection follows on the next page. There is no blank application to be completed and mailed. The nomination packet consists of all the appropriate information about the Laureate nominee compiled by the chapter. Either one digital or three paper sets of all nomination materials are required.

Nominations must be received by the Executive Director by April 1 with judging done by a committee of District Directors. All nominees are then notified in early summer. A TBII Laureate receives a $2,500 cash award and a plaque, which are presented at the Convention. The cash prize is considered taxable by the IRS.

**Objective:** A major purpose of TBII stated in the Preamble to the Constitution is “. . . to foster a spirit of liberal culture in engineering colleges.” The TBII Laureate Program has been established to recognize members who have superbly demonstrated that technology alone is not the sole concern of the engineer. This concern for liberal culture is reflected by the nominee’s achievements while enrolled as a student of engineering. It is desired that greater emphasis will be placed on fostering a spirit of liberal culture by members of TBII through this program of nomination, selection, and recognition.

**Basis for Nomination:** The Laureate Awards are intended to honor those persons who have made outstanding contributions in areas of liberal culture as interpreted by the Laureate Selection Committee. These areas may include Arts, Athletics, Diverse Achievements, and Service.

**Laureate Award and Recognition:** Each Laureate receives a cash award of $2,500 and a recognition plaque, is announced at the Convention, and has a photograph and recognized accomplishments published in THE BENT.

The Executive Director shall arrange for an appropriate presentation of the plaque and cash award to the Laureate and arrange for letters and media recognition. A recognition plaque is also awarded to the Laureate’s nominating chapter at the national Convention.

**Relationship to Other Awards:** The Laureate award is a grant based on nomination, with no stipulations relative to any other award, grant, or fellowship. An individual may be selected as a Laureate only once.

**Funding:** The Laureate Program costs up to $12,500 for annual cash awards, plus expenses for plaques, publicity, and administration.

**History:** The Executive Council was directed by the 1981 Convention to conduct the Laureate Program on a three-year trial basis, during which Convention Laureate Committees modified the program to accomplish its objective. The 1984 Convention formally established the Laureate Program and adopted a new Bylaw XI. A list of Laureates is included on the website and in the TBII Information Book.

Rev.—August 2009
LAUREATE NOMINATION AND SELECTION

Any TBII collegiate chapter is encouraged to nominate one or more of its active student members as a Laureate. Nomination shall be made to the Executive Director prior to the April 1 deadline set by Headquarters. A nomination packet should be prepared by the nomination committee, excluding but in consultation with the nominee. The format is left up to the discretion of the nominating chapter, but all text must be 1.5-to-double spaced for ease of reading. It shall include each of the following in triplicate or in digital format.*

1) A letter of nomination from the chapter specifying the area of contribution (arts, athletics, diverse achievements, or service) and approved by each member of the Advisory Board (Advisors, president, vice president, and corresponding secretary).

2) A one-page nomination summary in the spirit of answering “What are the five strongest points made in the documentation that makes this nominee worthy of the Laureate designation?” Include specific example(s) for each of these points that illustrate the nominee’s accomplishments. For activities that were part of a team or group, be sure to distinguish the nominee’s contribution from that of the team/group as a whole, where possible.

3) A three-page description of the contributions by the nominee to the fostering of liberal culture. This serves as a description of the nominee’s activities and accomplishments only during his or her time as an engineering student. Include all dates or periods of contribution, and approximate time spent on contributions. Realizing that selection committee members will probably not be experts in the nominee’s field, nominators should avoid jargon or making assumptions about what is “generally known.” The chapter should write it in the third person.

4) A half-page biographical sketch of the nominee prior to enrollment as an engineering student. The purpose of the sketch is not to establish family history, heritage, birthday, or places of residence. Rather it should serve to give the committee an impression of the nominee’s personality and development into an area of liberal culture. The nominee should provide the personal information; the chapter should write it in the third person.

5) A short description of TBII activities. Include date of initiation, committee work, offices held, and TBII activities in which the nominee participated (include dates).

6) An unofficial transcript and a personal résumé including: a) Expected date of graduation, b) Email address and home and school addresses, and c) GPA.

7) Three confidential reference letters from appropriate college, community, and other persons, submitted in triplicate to the nomination committee. (National officers are not permitted to write recommendations for candidates.) Letters of reference are not to be reviewed by the nominating committee or the nominee. All references must provide three copies of the reference letter, each in a sealed envelope with a signature on the back. The letters should be personal, of high quality, and from one who can speak to the qualifications upon which a nomination is based. References should specifically address the candidate’s personality and contributions to liberal culture, not the nominee’s academic accomplishments. Letters are often a deciding factor.

8) Pertinent supplementary material. This is useful and provides another perspective of the nominee. It shall be concise and relevant, but not overwhelming or elaborate. CDs, videotapes, and photocopies of artistic works are discouraged, because the selection committee is unqualified to judge these submissions.

The Laureate Selection Committee, a committee of District Directors, shall select up to five Laureates, with a maximum of two awards given in any one category. Packets will not be returned unless requested.

*Bind the nomination materials only with paper clips and/or staples.

Rev.—August 2009

C-34
DISTINGUISHED ALUMNUS AWARD

OBJECTIVE

The primary purpose of this award is to recognize annually up to five TBII alumnus members who have continued to live up to the ideals of TBII as stated in our Eligibility Code and to foster a spirit of liberal culture throughout their lives after their college years. The TBII Association has identified this award as an opportunity to “mark in a fitting manner” exemplary performance by alumni. Another purpose of the award is to demonstrate excellence and leadership in character and liberal culture to members of collegiate chapters and to influence their professional careers and personal lives.

TBII members who should be considered for this award have made exceptional efforts to promote a spirit of liberal culture in areas such as (but not limited to) community service, fine arts, and athletics on local, national, and/or international scales in addition to their outstanding accomplishments in engineering. Their achievements exemplify the diverse contributions that engineers make to society. They demonstrate the integrity, breadth of interest both inside and outside engineering, adaptability, and unselfish activity cited in our Eligibility Code. These outstanding Tau Bates continue to strive with integrity for excellence in their work and activities. They truly fulfill our Eligibility Code requirements by exercising their capacity for giving their best without limit.

NOMINATION

Any TBII member or chapter may nominate one (or more) alumnus member(s) for the award. The nomination (in digital format) shall be made to the Executive Director by February 1. Members who serve as TBII national officials shall not be considered.

The documentation required is:
1.) Name, contact information, chapter, and class;
2.) Summaries of the professional and liberal cultural career achievements of the nominee, with an emphasis on contributions to liberal culture; and
3.) Contact information of the nominator and at least two references to provide letters. (See next page.)

AWARD AND RECOGNITION

The award will be presented to each honored alumnus at the Convention that year. In addition, TBII will present each honoree with a recognition plaque and will pay appropriate travel expenses for the honoree to attend. There is no cash award to the recipient. TBII will name a national scholarship in honor of the recipient in the following year. Recognition also includes publicity of the award and scholarship in THE BENT and other national and local publications.

SELECTION COMMITTEE

The selection of the national recipient of the Distinguished Alumnus Award will be made by a committee of national officers appointed by the Executive Council through a process determined by the Council.

Rev. — November 2011
I. Nominee Information

Name (first, initial, last): ___________________________________________________
Business Address: _________________________________________________________
Business Phone: _________________________________________________________
Business Email: _________________________________________________________

And/or
Home Address: _________________________________________________________
Home Phone: _________________________________________________________
Home Email: _________________________________________________________

TBP Chapter & Class: _______________________________________________________
Undergraduate college & date if known: _______________________________________

II. Examples of Efforts to Foster a Spirit of Liberal Culture (The basis of this award)

Attach a one- or two-page summary of lifetime contributions of the nominee that are in
harmony with the objective of the award as stated in the program description. Provide
specific and complete examples. Detail the specific activities and contributions to, and
impact on, liberal culture (with dates).

III. Educational/Professional/Engineering Positions and Accomplishments

Attach a one- or two-page summary of career accomplishments or Bio or Curriculum Vitae
of the nominee, including dates.

IV. Other Items required for this nomination:

Attach a list of names, phone numbers, and email addresses for the nominator, the nominee,
and at least the two included references who will be contacted by the Selection Committee.
The signature below confirms that nominee would be willing to accept the award. The
deadline is February 1.

Nominator
Signature: ___________________ Chapter & Class: ___________________
Phone: ___________________
Email: ___________________
Print Name: ___________________
Date: ___________________

President (if chapter nominates)
Signature: ___________________
Chapter & Class: ___________________
Phone: ___________________
Email: ___________________
Print Name: ___________________
Date: ___________________

Rev. — November 2011

C-36
McDONALD MENTOR AWARD

OBJECTIVE

Marion and Capers McDonald, North Carolina Gamma ’74, and the Association have established an award to celebrate excellence in mentoring and advising among TBII educators and engineers who have consistently supported the personal and professional development of their students and colleagues as excellent mentors or advisors. Serving as engineering educators or as professionals in industry, government, or service organizations, these TBII mentors have contributed diversely to our engineering community, serving as effective advocates and guides in both professional and administrative matters. They have shown true concern for the individual, supporting an environment for developing talents, and have earned respect and recognition for their contributions to their field and to the greater community. In 2005, the Council established the award to be given annually.

NOMINATION

Any chapter or TBII member may nominate one (or more) alumnus member(s) for the award. The nomination (in four sets) shall be made to the Executive Director by April 1. Nomination packets will not be returned unless requested.

The following material is required:
1) A one-page summary of achievements and/or contributions of the nominee exemplifying the objective of the award.
2) Two letters of reference from persons other than the nominating party or the sponsoring chapter president who are familiar with the nominee’s contributions and achievements, such as the dean or supervising personnel.

AWARD AND RECOGNITION

The award will be presented to the Mentor of the Year at the national Convention. The honoree will receive a special medallion and $1,000 (plus $1,000 in the name of the honoree to the nominating chapter or the honoree’s chapter if nominated by an individual). TBII will pay appropriate travel expenses for the honoree to attend. Recognition also includes publicity of the award in THE BENT and other national and local publications. If the honoree cannot accept a financial award, that portion will remain in the endowment fund.

SELECTION COMMITTEE

The selection of the TBII-McDonald Mentor will be made by a committee of national officials appointed by the Executive Council. Only one award will be presented each year and will be announced by September 1.

Rev.—May 2006

C-37
The 1996 Convention established the National Outstanding Advisor Award, given initially in 1994 and evaluated during a three-year trial. The objective of the award, which includes a plaque, $1,000, and $1,000 in the name of the winner to the dean’s discretionary fund, is to recognize outstanding performance among the TBII chapter Advisors.

Chapters may recommend one Advisor for the award based upon his or her contributions. A nominating committee from the chapter, excluding but in consultation with the Advisor-nominee, should prepare the nomination material and send it to the Executive Director by April 1.

The following material should be sent in four sets (elaborate presentations are discouraged; nomination packets will not be returned unless requested):

1) A letter of nomination from the chapter which specifies the manner in which the nominee has fulfilled, with sustained excellence (for a minimum of three years), the role of Advisor, consistent with the TBII mission. The letter must be signed by each member of the Advisory Board, except for the nominee.

2) A letter from the dean of engineering, supporting the nomination and addressing the closeness of the interaction of the chapter’s Advisor-nominee with the administration, on behalf of the chapter.

3) A letter from a District Director, supporting the nomination and addressing the closeness of the interaction of the chapter’s Advisor-nominee with the District Program.

4) A one-to-three-page description of the contributions of the nominee to the chapter. This should address the manner in which the Advisor-nominee fulfills the position in support of the TBII mission. It is also useful to include information on the accomplishments (awards, activities, etc.) of the chapter under the leadership of the nominee.

5) A résumé, not to exceed three pages, of the Advisor-nominee.

The award cannot be received more often than once every four years.
IMAGE MATERIALS

Several posters and other items exist to help you make TBII better known on your campus, which will make your work much easier. Please order and place them on bulletin boards where students will see them. A chapter has done a good job of public relations on its campus if when offered membership a junior or senior electee replies “Tau Beta Pi? Of course I’ll join!”

Three impressive TBII POSTERS, the “Information About Tau Beta Pi” poster, and blank bulletin sheet for chapter announcements are available. Details and an online order form are available on the website at www.tbp.org/chapters/resources and on page C-46.

The INTRODUCTORY BROCHURE is used to describe the key features of TBII and the benefits of being a member to the general public, potential members, and supporters. Brochures may accompany mailings to students and parents and may be distributed to engineering freshmen in registration packets, orientation packets, or during engineering open houses. The DISPENSER holds 10 brochures and can be stapled to bulletin boards. Free TBII BOOKMARKS are also available. The ELECTEE BROCHURE is designed for chapters to provide elected students with additional information about membership.

An interactive TBII CD-ROM, useful in demonstrating activities of TBII to electees, parents, or freshmen, was filmed at the Convention and prepared for chapter use in 2008. Use the order form on page C-40.

KEY AND CERTIFICATE DISTRIBUTION

Many chapters have an assortment of keys and certificates which have not been distributed to members. It is the chapter’s responsibility to see that each Tau Bate receives his or her membership insignia.

An excellent electee project would be the distribution of keys and certificates. The Headquarters staff will be happy to email a file of your chapter members and their addresses to you upon request.

Please give this idea consideration because all members should receive their insignia. Conversely, care should be taken that insignia are not given to those electees who were never initiated.

LOST ALUMNI

The Headquarters staff needs your help in locating the 160,000 “lost” members of TBII. Chapters that have helped to find lost alumni since 1985 have found 46,000 lost Tau Bates through their alumni offices and various directories. Many alumni have written to express their appreciation for getting in touch with them again.

If you are interested in this project, ask the staff to send the chapter file and instructions to you. This is a worthwhile project for a small group of your electees to complete, and your chapter will be credited with 20¢ for each new address.

Rev. — February 2011

C-39
THE ΣΒΠ ASSOCIATION

INFORMATIONAL/DISPLAY MATERIALS REQUEST

(Free to Chapters unless noted—order online at www.tbp.org/chapters)

DATE_______________________ CHAPTER____________________________

To: Tau Beta Pi, P.O. Box 2697, Knoxville, TN 37901-2697 Fax: 865/546-4579

Please send the following:

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<th>Item</th>
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<td>ANNOUNCEMENT SHEETS</td>
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<td>BOOKMARKS</td>
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<td>CD-ROM for orientation meeting “About Tau Beta Pi”</td>
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<td>CANDIDATE PACKETS (Introductory, Electee &amp; Local Chapter Brochures, plus wallet, grouped for convenience, or order separately below)</td>
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<td>CHAPTER STATIONERY Generic: $12/100, envelopes–$13/100</td>
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<td>INVITATION 2–to Electees w/response card (“Congratulations! TBP invites you…”) w/env.</td>
<td></td>
</tr>
<tr>
<td>POSTERS</td>
<td></td>
</tr>
<tr>
<td>“Classic Bent”</td>
<td></td>
</tr>
<tr>
<td>“More than an Honor Society”</td>
<td></td>
</tr>
<tr>
<td>“Diverse Activities”</td>
<td></td>
</tr>
<tr>
<td>Information about TBII (blue &amp; white)</td>
<td></td>
</tr>
<tr>
<td>ENGINEERING FUTURES/MindSET BROCHURES (specify)</td>
<td></td>
</tr>
<tr>
<td>Ship them to:* Name____________________________</td>
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<tr>
<td>Street Address________________________________</td>
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<tr>
<td>Signed _______________________________________</td>
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<tr>
<td>Date needed: ________________________________</td>
<td></td>
</tr>
<tr>
<td>Phone or email: ______________________________</td>
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</tbody>
</table>

*NOTE: Most items will be shipped to you free of charge by UPS-ground; special shipping will be charged to your chapter. Please allow 7-10 business days for shipment. The address above must be one where someone will be during normal business hours to sign for the package. **No post-office-box addresses should be listed unless you explain.** Thanks.
CHAPTER SUPPLIES AT HEADQUARTERS

1. **ANNOUNCEMENT SHEETS, BLANK.** Heavy paper, 8.5" x 11", TBII heading, with space for inserting notices of chapter meetings, projects, etc., free.

2. **AWARD CERTIFICATES.** 8.5" x 11", "blank" with regulation TBII name and Bent at top and gold seal at lower left, for chapter awards, ready for special lettering by your chapter, $3 each.

3. **BOOKMARKS.** For distribution to engineering freshmen and others, free.

4. **CANDIDATE PACKETS.** Introductory brochure, Electee brochure, Chapter brochure, and Wallet, for distribution to electees, free.

5. **CASTINGS of THE BENT.** Rough bronze, flat back, 4.7" long, $4 and paperweight style with base, 4" high, $9.


7. **CHAPTER BROCHURE.** Blank brochure for chapter use, free.

8. **CHAPTER PROJECT IDEAS (only on website).** Details of recent projects conducted by chapters are available only online.

9. **CHAPTER ROLL BOOK.** Gold-stamped with chapter name, space for 1,000 signatures, used in initiation ceremony, $50.

10. **CHAPTER STATIONERY.** Generic price list is online under Chapter Materials.

11. **CONSTITUTION & BYLAWS & ELIGIBILITY CODE BOOKLET, INFORMATION BOOK, ETHICS BROCHURE, & LIFE SUBSCRIPTION CARD.** Supplied in sufficient number for electees, free.

12. **CREED CARDS.** Available as needed, free.

13. **ELECTEE BROCHURE.** Informational brochure ("Decision") about TBII, for distribution to electees, free.

14. **ENGINEERING ETHICS.** Informational sheet with code of ethics of engineers, for distribution to electees, free.

15. **ENGINEERING FUTURES BROCHURE.** Descriptive brochure about the Engineering Futures Program for distribution to interested members, free.

16. **HONOR CORD.** Traditional orange & white two-color graduation cord in the regular "cum laude" size, 1 strand and tassel white & 1 orange, knotted cord, $15.

17. **IMAGES of THE BENT, TBII SEAL, or GREEK LETTERS TBII (online).** Suitable for making any size engraving or negative for printing programs, shirts, letterhead; also, FILMPRINTS are $3 each to mail.

18. **INTRODUCTORY BROCHURE.** Descriptive brochure about TBII, for distribution to engineering freshmen and others, free.

19. **INTRODUCTORY BROCHURE DISPENSER.** To be filled with introductory brochures and hung on a wall or bulletin board, free.
20. INVITATION to ORIENTATION, w/ envelope (TBII is considering You), free.
21. INVITATION to ELECTEES, w/ response card & envelope (TBII invites You), free.
22. MEMBERSHIP CERTIFICATE, replacement for active members, $13.
23. MEMBERSHIP KEY, replacement for active members. Gold-finish, $29.
24. MEMBERSHIP KEYS and CERTIFICATES, REPLACEMENT for ALUMNI. Price list and order form printed in THE BENT and on the website.
25. MEMBERSHIP INSIGNIA. Price list & order form are in THE BENT and the website.
26. MOTTO SLIPS. Available as needed, free.
27. POSTERS, INFORMATIONAL. Series of three individual, for bulletin board(s), free.
28. PRESIDENT'S BOOK. 3-ring binder, for 8.5" x 11" paper, $35.
29. PRESIDENT'S BOOK PAGES. Complete set, to replace damaged or worn sets, free.
30. REPORTS SETS, BLANK. Graduate-student Eligibility, Election, & Final Action reports and catalog cards are sent regularly as needed. Extras free.
31. RIBBON. For tying keys, brown or white, 100-yard roll, $15.
32. RITUAL. May be checked for correctness at any time if sent to the Secretary-Treasurer. Replacement free.
33. SECRETARY’S BOOK. 3-ring binder, for 8.5" x 11" paper, $35.
34. SECRETARY’S-BOOK PAGES. Blank, reinforced, 8.5" x 11", 50 for $3.
35. STOLE. White satin graduation collar embroidered with Bent, $18.
36. TREASURER’S BOOK. Loose-leaf covers, 0.5" rings $10.
37. TREASURER’S BOOKKEEPING PAGES. Forms 1 & 2, fit Treasurer’s Book, free.

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NOTES:

• Insert this list into your President’s Book.
• All items may be charged to chapter accounts.
• Replacement certificates & keys, honor cords, & stoles can be ordered online.
• Delivery will be by United Parcel Service.

Rev. — February 2011
PROPER USE OF INSIGNIA

In accord with Constitution Article I, the Executive Council wishes to remind the chapters that it will consider requests for use of the insignia replica under the following guidelines:

1. Design must primarily advance the image/visibility of and not cause embarrassment to TBPI.
2. To maintain a uniform image, only the upright Bent defined in the Constitution and Bylaws (proportions MUST be maintained, stylized versions are not permitted) or the new millennium logo (image and text) may be used. The centennial (slanted) logo is not approved for use. Approved graphics are available for download.
3. Design must be approved by the Council in accordance with the Constitution & Bylaws. Submit design to Headquarters for approval before printing.
4. Items using the insignia or name of TBPI are for TBPI members ONLY.

ASSOCIATION JARGON

The Association tries to keep Tau Beta Pi-ese to a minimum. You’ve seen that we’ve referred throughout this manual to Headquarters rather than “central office, national office, or national,” the Secretary-Treasurer or Executive Director rather than “Executive Secretary,” the Executive Council rather than a “board of directors,” and the chapter Advisor rather than “sponsor.”

The only other idiosyncrasies of the lingo concern the legal name, the type of organization, and the classification of members.

The legal name of TBPI is *The Tau Beta Pi Association, Incorporated.* It is recommended that pronunciation of the name be: Taw (as in raw) Bay-ta Pie.

*The Association is an honor society, not a fraternity.* An honor society’s purpose is to encourage and recognize superior scholarship and/or leadership in education. A fraternity’s purpose on the other hand, is to organize the social life of its members as a contributing factor to their educational development. These purposes are valid, but quite different! Calling TBPI a fraternity, an honorary fraternity, an honorary society, or an “honorary” is wrong; the correct terminology is *honor society.*

Your local unit of the national organization is properly called a chapter, not a club. The connotation of a club includes limited activity and limited geographical scope.

Those individuals who are being considered for election to membership should be called *candidates.* Those individuals, or candidates, who have been elected to membership should be called *electees,* not pledges. TBPI has electees; fraternities and sororities have pledges.

All TBPI members, junior, senior, or graduate engineering students, alumni, or eminent engineers at the time of their initiation, have the same rights, privileges, and responsibilities. (See Article VI, Section 1.) There are several eligibility routes to membership, but once initiated, all are just members. There is *no such thing* as an honorary member of the Association—*there is but one class of membership.*

TBPI is the world’s largest engineering society, and all members are considered *life members.* Those nearly 80,000 members who have purchased life subscriptions to THE BENT are referred to as *life subscribers.* Leaders of committees are properly called *chairs.*

Rev. — February 2011
MAIL, SHIPPING, & FAX

All correspondence from Headquarters will be sent to you by first-class or priority mail, or by email. Priority mail is simply first-class mail which weighs more than 10 ounces; special rates depend upon distance. Packages are shipped by United Parcel Service.

1. **First-Class or Priority Mail** (must use *P.O. Box address*)

   All reports & correspondence to Headquarters should be sent by first-class mail to:

   Tau Beta Pi  
P.O. Box 2697  
Knoxville, TN  37901-2697

   First-class mail should reach the addressee within three days after it is posted. If something must reach us sooner, use *express mail*, which is explained below.

2. **Express Mail, UPS, or FedEx** (DO NOT use PO Box; must use *building address*)

   Use express mail for any urgent correspondence. This service is available in most cities; mail taken to your post office is guaranteed to be delivered by 3:00 p.m. the next day. The cost of this service depends upon your distance from Knoxville; check your local post office for current rates. DO NOT place the P.O. Box in the address for express mail; doing so will delay your package.

   *The Headquarters address to use for express mail is:*

   Tau Beta Pi  
Room 508, Dougherty Engineering Bldg.  
1512 Middle Drive  
University of Tennessee  
Knoxville, TN  37996-2215

3. **United Parcel Service**

   The Headquarters staff sends all membership materials, posters, castings, and other items to chapters by UPS. (The exceptions are Puerto Rico Alpha and Alaska Alpha, for which priority mail delivery is used.)

   UPS requires an address where someone will be during normal business hours to accept shipments—such as your chief Advisor’s, your dean’s, or departmental office. The company will not deliver to post office box addresses or dorm rooms.

   Notify Headquarters of the best address to use for UPS delivery of your supplies.

4. **Fax: 1-865/546-4579**

   Use the Headquarters facsimile number to expedite any correspondence, but realize that facsimile documents are *not* permanent records. Therefore *any original paper membership reports* must be completed, signed, dated, and mailed.
THE IMAGE OF TAU BETA PI:

PROBLEMS AND SOLUTIONS

Report of the Committee on Image, 1974 Convention

The 1973 Convention was concerned that TBPI’s public image, particularly on campuses, had slipped. Membership refusals by qualified students had risen in recent years. Why? A special committee of the 1974 Convention was appointed to delve into the problem. This is its report. The committee identified five general problem areas and numerous specific problems within those areas. It then suggested solutions to each. The Convention ordered that the committee report be made a part of the President’s Book. (The material has been updated to reflect changes that have been made since 1973.)

General problem I. The public does not know about TBPI’s purposes and functions.

Specific problem A. TBPI fails to publicize adequately its purposes and functions.

Suggested solutions 1. Information brochures can be obtained free of charge from Headquarters. Chapters should distribute them (along with orientation material) to freshmen and sophomores, or in pre-engineering classes, or by some other effective method.

2. The local chapter should try to contribute to fairs and expositions or open houses sponsored by the university or college.

3. The chapter should use Society posters and displays effectively and conspicuously. Posters that list the eligibility requirements are available free from Headquarters. Blank announcements with the logo and space for chapter messages may be obtained at no charge.

4. In universities where “blue books” are required for tests, chapters could supply them with the name “Tau Beta Pi” printed on the front.

5. Publicity in local and/or campus newspapers should be sought. Chapters should issue news releases on major events. Invitations to initiation banquets could be sent to reporters. Individual members can write or serve as resource persons for articles relating to their disciplines for the campus newspaper.

6. The Association should consider the possibility of implementing a national public relations program.

7. The Executive Council should identify nationally known engineers and recommend to the host chapters of Conventions that they be elected as eminent engineers and initiated into membership at the Convention. Appropriate national news coverage of the event should be sought.

Specific problem B. Members of TBPI have little or no contact with freshmen and sophomores and with high-school students.

Suggested solutions 1. Members of the chapter should, with faculty approval, make brief presentations in the classroom to acquaint secondary students with the purposes and ideals of TBPI.

2. Members of the chapter should try to persuade faculty members to give verbal support to TBPI in the classroom.
3. Chapters should consider recognizing outstanding freshmen and sophomores as a way of acquainting them with the purpose of TBII.

4. Members should accompany faculty members on guidance trips to high schools.

5. Members may assist in sponsoring Junior Engineering Technical Society (JETS) chapters in local high schools.

6. Headquarters has a TBII CD-ROM that can be shown with PowerPoint presentations of chapter activities to present a view of TBII both locally and nationally.

7. Headquarters might help to establish on any campus a local society to honor promising freshmen and sophomores.

General problem II. Prospective members misunderstand or are alienated by TBII’s requirements for membership.

Specific problem A. Students refuse membership because they cannot afford to pay the initiation fee.

Suggested solutions
1. The chapter should make clear to prospective members that the fee can be borrowed from either national or chapter funds.

2. The chapter should make clear that the life-long benefits of TBII membership are immensely greater than the cost.

Specific problem B. Candidates dislike having to write essays.

Suggested solutions
1. The Bylaws do not require an electee essay. Instead, emphasis is placed on electee participation in an activity fostering a spirit of liberal culture (B. VII, Sec. 7.01).

2. This activity may include writing an essay, but if that requirement discourages acceptance of membership by candidates, the chapter is strongly urged to drop that requirement.

Specific problem C. Meaningless or time-consuming projects may keep candidates away.

Suggested solutions
1. The chapter should select worthy projects in which electees are asked to participate. “While duties for the electees are permissible, they shall be limited to tasks and duties that are a test of an electee’s intellectuality and mentality rather than physical strength and endurance . . .” (B. VII, Sec. 7.02). Projects that are not meaningful—that do not offer a service, for example, or that are insulting to the electee’s mentality—will alienate prospective members.

2. Projects should not consume an inordinate amount of the electee’s time “to the possible detriment of required college work” (B. VII, Sec. 7.02). We recommend one day as the maximum length of time required for completion of the project.

3. A good project may be repeated every year; each electee project need not be unique. There is advantage to be gained, in fact, by associating the chapter with a particular project.
D. Pre-initiation activities may be degrading or too costly.

1. Chapters must not abuse or degrade their electees in any way. “Physical violence, offense to dignity or decency, and public exercises that make the electee ridiculous in any way shall not be permitted” (B. VII, Sec. 7.02).

2. Costs of any electee activity should be limited. “The expense of any electee activity shall be carefully considered and not be prohibitory to the Chapter or the electee” (B. VII, Sec. 7.02).

E. Secrecy and privacy may obscure the organization.

1. Whether TBPi’s motto should be secret has been debated often at Conventions. It should be emphasized that little besides the motto is secret. If the chapter feels that secrecy obscures the organization and alienates prospective members, the chapter should work through the Convention in accord with Constitutional procedures to abolish that secrecy. Some members feel, however, that secrecy lends charm to TBPi.

2. Some members feel that opening the now-private initiation ceremony to the public would improve the standing of the organization on the campus. Such members should work through Constitutional channels to remove the requirement of privacy. Other members argue, however, that privacy enhances the ceremony.

III. Many students fail to recognize the value of membership in TBPi.

A. Students feel that they do not need the recognition for their academic achievements that membership confers; they regard their achievements as self-rewarding or find their grade records gratifying enough.

1. Chapters should emphasize that membership in TBPi is more than recognition of academic achievement. It is also recognition of exemplary character.

2. Chapters should emphasize that, beyond recognizing academic achievement and exemplary character, membership in TBPi also provides the opportunity for service, the chance to work with fellow members on worthwhile and fulfilling projects of a social and academic nature.

B. Students do not appreciate the tangible immediate benefits of membership in TBPi.

1. The chapter should emphasize the availability of undergraduate and graduate loan funds.

2. The chapter should emphasize the availability of graduate fellowships.
Specific problem  

C. Students are unaware of future benefits of membership in ΤΒΠ.

Suggested solutions  

1. Chapters should emphasize the importance that employers attach to membership in ΤΒΠ.

2. Alumnus members could help to underscore the benefits, both tangible and intangible, of membership after graduation.

Specific problem  

D. Some students whine that ΤΒΠ enshrines an elite group of academic snobs.

Suggested solutions  

1. Members of the chapter who display a snobbish attitude should be tactfully reproached by the president or Advisor of the chapter.

2. Members should explain to the student body that though Tau Bate are distinguished by their achievements, they do not regard themselves as superior people. Furthermore, membership in ΤΒΠ charges a Tau Bate with the responsibility to live up to his or her potential as a leader in the future.

3. Members who personally deliver letters of invitation to eligible candidates will help to combat the charge of snobbishness.

General problem  

IV. Members of ΤΒΠ may not enjoy good relationships with other people on the campus.

Specific problem  

A. The chapter suffers from lack of faculty support.

Suggested solutions  

1. Personal contact with the dean of engineering, who can influence and relate to most faculty members, should be made early in the year.

2. Chapter members should personally invite faculty members, especially the dean, to initiations and banquets and arrange for them to participate in the initiation ceremony as members of the team.

3. If repeated attempts to interest faculty members in the chapter fail, members should seek help from off-campus alumnus members, perhaps through a nearby ΤΒΠ alumnus chapter, inviting them to talk to faculty members to arouse their interest in ΤΒΠ.

4. Faculty members who are candidates for chapter Advisor should be carefully screened. The chapter should weigh each faculty member’s merits and the amount of time he or she has to devote to ΤΒΠ. Faculty members should be interviewed so that the chapter can be sure that they are in accord with ΤΒΠ principles and have the time to participate as chapter officers.

5. Faculty members may be initiated as eminent engineers, if qualified.

6. Faculty members should be personally asked for suggestions of projects and other activities.

7. Faculty members may be asked to hand letters of invitation to eligible candidates.
<table>
<thead>
<tr>
<th>Specific problem</th>
<th>B. The chapter is competing with other societies.</th>
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<tbody>
<tr>
<td>Suggested solutions</td>
<td>1. The chapter should try to coordinate activities with other societies.</td>
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<td></td>
<td>2. A joint calendar of activities and shared activities are two ways of establishing cooperation instead of competition.</td>
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<tr>
<th>Specific problem</th>
<th>C. The chapter is too isolated from the rest of the college community.</th>
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<tbody>
<tr>
<td>Suggested solutions</td>
<td>1. The chapter should extend its social activities to include others besides its own members to promote a closer relationship between Tau Bates and the rest of the campus.</td>
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<td>2. The chapter’s service projects should reach into the college community and perhaps beyond.</td>
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<td>3. To show its concern for excellence beyond its own membership, the chapter may honor local engineers and politicians for achievements of engineering excellence in appropriate ways.</td>
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<tr>
<th>General problem</th>
<th>V. Problems within a chapter damage its reputation in the campus community.</th>
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<tbody>
<tr>
<td>Specific problem</td>
<td>A. Poor management by chapter officers diminishes the chapter’s effectiveness.</td>
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<tr>
<td>Suggested solutions</td>
<td>1. The application of existing policies, principles, and machinery as explained at the annual Convention will greatly reduce the possibilities of bad management.</td>
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<td>2. Frequent reference to the President’s Book and the Constitution and Bylaws will assist officers in the conduct of chapter affairs.</td>
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<td>3. Retiring officers should present concise and detailed instructions to their successors.</td>
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<td>4. The District Directors should offer suggestions on effective chapter management to the chapter officers.</td>
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<td></td>
<td>5. The Executive Council should develop a program of assistance for chapters that are in difficulty.</td>
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