Table of Contents

Preface 2
Foreword 2

1. Association Overview 3
   Association Organization 3
   Chapters 3
   The Convention 3
   The Executive Council (EC) 3
   Headquarters 4
   Program Directors 4
   The District Program and District Directors 4
   The Student Advisory Board 4

2. Advisor Functions and Responsibilities 4
   Chapter Advisory Board 5
   Advisor Responsibilities 5

3. Recommendations 6
   Financial and Organizational 6
   Chief Advisor 6
   Chapter Guidance and Rewarding Interactions with Students 7
   Transition to New Officers 7
   Chapter Awards 7
   Encouraging Eligible Students to Accept Membership 7
   Participating in Chapter Projects 8
   Participating in Chapter Meetings 8
   Association and Chapter Relations with the College and University 8
   Rejuvenating a Faltering Chapter 8
Preface

The Collegiate Chapter Advisors’ Manual (the Manual) is the 26th edition of the Tau Beta Pi Association, Inc., (the Association) Advisor’s Book, the first edition of which was written in 1950 by Robert H. Nagel, P.E., who produced the following seven editions.

This Manual is intended to provide orientation information for newly elected advisors to collegiate chapters of the Association. Advisors need not be members of the faculty at the chapter’s host institution, although they customarily are.

The Executive Director, as required, shall make changes to the links, graphics, or references for purposes of maintaining currency of the Manual. The EC shall be notified about all such changes, which must be highlighted using the change tracking function of Microsoft Word. Any substantive changes shall be approved by the EC.

At a minimum, the Manual should be reviewed annually and updated, as necessary.

The Executive Director shall maintain revision control of the Manual.

The current version of the Manual shall be housed on the Association’s Website.

Foreword

Congratulations on your appointment as a Chapter Advisor. Good chapter advisors are the key to successful Association chapters. The Association has the best advisor corps among all collegiate honor societies. I welcome you to this important role and look forward to your hearty participation in guiding your chapter during your term as an Advisor.

I have seen chapters that were struggling just to remain active become outstanding chapters in less than a year, and outstanding chapters that have fallen apart in less than a year. The common thread in both cases has been the quality of chapter leadership or the lack thereof. Your support and guidance of the chapter’s officers will inspire and direct the course of the chapter during your time as an advisor. It is critical to have a vision of where you want the chapter to go and what you want to achieve during your term.

This Manual has been prepared in an attempt to answer most of your anticipated questions. It should serve as a stimulus for closer and more cooperative relations between the chapter, the college or school of engineering administration, and Association Headquarters (HQ), as well as a guide to help you ensure the viability and growth of the chapter. It provides you with an overview of the Association’s operating scheme, particularly with respect to the chapter’s relations with HQ and your part in that function, and details the responsibilities and expectations of your role.

I wish you the very best in your role as a Chapter Advisor. Do not hesitate to reach out (curt@tbp.org) when you have questions or need advice.

Sincerely,

Curtis D. Gomulinski
Executive Director
1. Association Overview

Association Organization

The governing structure of the Association is shown in Figure 1.

![Figure 1. Association Organization Chart](image)

Chapters

The collegiate chapters carry out the Association’s activities at their respective engineering institutions and have the ultimate governing authority, which is exercised by their representation at the annual Association Convention and their control over the provisions documented in the Constitution and Bylaws. Only collegiate chapters can elect new members into the Association and are tasked with carrying out the Association’s principle objective of marking “in a fitting manner those who have conferred honor upon their Alma Mater by distinguished scholarship and exemplary character.” All chapters are expected to send at least one voting delegate to the annual Convention at the Association’s expense.

The Convention and the EC bear the same relationship to our chapters as the United States’ federal government bears to the individual states. Conventions and the EC have only those powers granted to them through the Association Bylaws and Acts of the Convention.

The Convention

The annual Convention, usually held in October, is the legislative body of the Association and the final court of appeals in matters of interpretation of the Constitution and Bylaws. It comprises one voting delegate of each of the collegiate and alumni chapters, members of the EC, the Executive Director, the Program Directors, and District Directors. Reimbursable expenses for student voting delegates include travel, lodging, and meals. The Convention has the sole power to grant new chapters, elect EC members, and amend the Association Constitution and Bylaws (Constitution amendments are subject to ratification by the chapters).

The Executive Council (EC)

The EC is the other governing body and is akin to a board of directors of a corporation. The EC is a team of alumni members elected by the Convention to lead the Association, under the provisions of the Constitution and Bylaws and the acts of the Convention. It guides the Association administration through a full-time Executive Director, and other Association Officials whom it appoints. All pertinent actions taken by the EC are reported back to the Convention. The EC elects from among its members the Association President, Vice President, Secretary, and Treasurer. The other members of the EC are referred to as Councilors. The size of the EC is set by the Convention at
between three and twelve members and is currently set by an act of Conventions at nine plus the Executive Director who serves as a non-voting member. EC members are elected on an individual basis and each member serves a staggered three-year term. A Councilor may be re-elected to an additional three-year term, but must take a year off before serving an additional term beyond two consecutive terms.

**Headquarters**

HQ is located on the campus of The University of Tennessee in Knoxville and has been there since R.C. Matthews, our first Secretary-Treasurer, moved to the university in 1907. The position of Secretary-Treasurer became the Executive Director in 1999. The HQ staff consists of the Executive Director, Directors for each of the major areas of responsibility, and accompanying staff members. Information about the [HQ team](#) and their associated roles is on the Association website.

**Program Directors**

The [Program Directors](#) are appointed by the EC to oversee the official Association programs. They include the Director of Alumni Affairs, Director of the District Program, Director of Engineering Futures, Director of Fellowships, and Director of the Ritual.

**The District Program and District Directors**

Association chapters have been apportioned into geographical districts since 1976, with the number of districts last updated to sixteen in 1999. The District Program provides your chapter’s members the opportunity to take part in Association affairs beyond your chapter, making them feel part of the larger organization. An [interactive district map](#) is posted on the Association website.

The focus of the District Program is to strengthen the collegiate chapters. Your chapter’s assigned District Director(s) will help you promote activities both within your own chapter and with nearby chapters. Following our policy of having the collegiate chapters govern themselves, District Directors provide assistance with the basic principles of running a voluntary membership organization. Responsibilities of the District Directors include: visits to your chapter, planning and leading District Conferences, attending the Association Convention, consulting on chapter management problems, participating in chapter functions, in particular, initiations, setting up alumni member contacts, and stimulating your chapter. More details about the [District Program](#) is on the Association website.

**The Student Advisory Board**

The [Student Advisory Board](#) (SAB) was established in 2013 to provide recommendations to the Executive Director on all aspects of Association collegiate chapters. The SAB identifies and prioritizes areas of potential improvement in chapter operations and works with the Executive Director to make those improvements.

Any undergraduate student, graduate student, or recent graduate (less than one year after graduation) is eligible to serve on the SAB.

### 2. **Advisor Functions and Responsibilities**

Although not shown in the organizational chart (Figure 1), chapter advisors are integral to preserving the continuity of a chapter. The Association collegiate chapters are student-run, but the guidance the chapter’s advisors provide are essential for the chapter to be successful. Advisors are also chapter officers and play an important part in the overall management of a collegiate chapter. Each chapter is required to have a minimum of four advisors who are elected for staggered terms of four years each, one new member being elected in the spring of every year at the same time that other new chapter officers are chosen.

Chapters are independently run by their student members within the broad limitations imposed by the [Association Constitution and Bylaws](#), Policies, and Acts of the Convention. Since there is little that the Association can legitimately do in controlling the actions of the chapters, except in extreme cases that may be formally brought to its attention, the burden of responsibility for chapter guidance must rest on the mature and experienced shoulders of the chapter’s advisors, who are most likely to understand the peculiar conditions of a situation and produce wiser counsel than a remote authority. The Association operates as a democratic, grassroots system of judicial control, and it works well when the Advisors are reasonably familiar with their chapter’s thinking and procedures.
Chapter Advisory Board

As an advisor, you are an officer of the chapter. A chapter may have more than four advisors, but only four are members of the chapter’s Advisory Board (Const. Art. VII, Sec. 11). The Advisory Board comprises four advisors and the chapter president, vice president, and corresponding secretary. The Advisory Board guides the chapter in its procedures and projects, and the advisors play a critical role in the Association scheme of operations. The chapter members elect the chapter’s advisors, but the Advisory Board elects its chair (usually the most senior advisor who is a faculty member at the chapter’s institution and who is called the Chief Advisor.)

The advisors serving on the chapter’s Advisory Board have one other major function: they must provide the necessary thread of continuity in chapter policies and procedures from year to year. Our student membership goes through an almost complete turnover every year. Officers and committee chairs change at least annually and, in the case of a few cooperative-education schools, as often as quarterly. In spite of numerous published instructions from HQ and repeated requests that retiring officers teach their successors their duties, it far too frequently does not happen. It certainly is not the responsibility of the advisors to supervise the work of the chapter’s officers but it does rest with the advisors, through the Advisory Board, to see that policies and practices, especially with regard to the election and initiation of new members, and management of the chapter’s finances are uniform and fair from year to year.

1. The Advisory Board is the primary guiding, counseling, and controlling agency for chapter work and activities.
2. The Advisory Board supplies continuity in chapter policy and practice.

The Advisory Board draws its responsibility and authority from the Constitution and Bylaws of the Association and the Bylaws of the chapter.

Throughout the Association’s collegiate chapters there are both strong and weak Advisory Boards. Weak ones are generally those whose advisors have too little interest in and concern for the chapter's well-being and progress. Occasionally, a weak board takes so much interest in its chapter that it usurps the prerogatives and responsibilities of the student officers. On strong boards, the advisors stay informed about the chapter's activities and maintain judicious guidance of its major affairs but do so without taking over control of chapter operations.

Advisor Responsibilities

In many chapters, the chief advisor (usually the most senior faculty advisor) does the bulk of the work. However, a strong chapter is one where all the advisors share responsibilities. Collectively, advisors should:

- Become familiar with the Constitution and Bylaws and pertinent Association Policies;
- Study the chapter election procedure and the chapter bylaws, and become familiar with the institution’s rules with respect to campus organizations;
- Audit the financial records of the chapter at the end of each year, and regularly review the chapter’s budget (an Advisor may be elected as chapter treasurer);
- Verify with the chapter that the IRS 990-N has been filed. Chapters should identify the Chief Advisor as the principal officer for this form;
- Serve on initiation teams to lend an element of faculty interest at that important ceremony, that is, attend and, as appropriate, participate in all initiation ceremonies;
- Attend routine meetings, possibly on a rotating basis among the advisors;
- Provide space for the chapter files and equipment when the chapter has no special room;
- Provide space to hang the framed chapter charter in a prominent location in an engineering building, in the dean's office or in the office of the Chief Advisor;
- Provide services to aid in the preparation of chapter records and reports;
- Attend the Convention and/or District Conference as time and funding permit;
- Provide the chapter’s student officers with the guidance and counsel they need to effectively run the chapter;
- Ensure and participate in regular, formal meetings of the chapter’s Advisory Board (a minimum of once per term is expected);
- Ensure that proper elections of new members are conducted;
- Serve as a neutral party to assist in the election of new chapter officers;
- Guide, oversee, and counsel but do not do the work of the chapter student officers;
Collegiate Chapter Advisors’ Manual

- Participate in chapter membership meetings and social events (at least one Advisor should attend every chapter meeting);
- Build rapport with the dean's office staff and the institution’s administration to help the chapter officers obtain candidate eligibility lists;
- Negotiate with the dean’s office to obtain secure storage for chapter files and initiation paraphernalia and a chapter bulletin board;
- Provide continuity from term to term for chapter operations;
- Ensure that the appropriate chapter student officers communicate regularly with HQ;
- Ensure that the annual Chapter Survey and other required submittals are correct and on time;
- Ensure that Project Reports are being submitted in a timely manner, soon after their respective events. (These are important because they form the basis of the Chapter Projects Award.);
- Encourage the chapter to consider developing advisors from local Association alumni, by electing available faculty as eminent engineers;
- Use the active Advisor Communication Channel, (e.g. currently Discord, which has a forum for interaction with other advisors);
- Go to the Advisor Evaluation portal and complete the survey annually to give the advisors’ perspective on chapter operations;
- Recruit new advisors;
- Maintain communication with at least one District Director.

3. Recommendations

You should keep in mind the fact that the student members of the chapter elected you because they believe you have the willingness and ability to serve the chapter faithfully.

Financial and Organizational

As stated earlier, it is recommended that each chapter have one particular advisor who makes it his or her responsibility to monitor chapter finances. With the constant turnover in student chapter officers, it is good policy to have someone maintain a continuous vigilance over the finances from term to term, and year to year since our chapters handle sizable sums of money every year, and HQ has no control over or visibility into individual chapters' internal financial transactions. Therefore, it is good practice for each chapter to elect a faculty advisor to serve as treasurer or have a designated advisor provide financial oversight.

It must be noted that the student chapter officers (President, Vice President, Recording and Corresponding secretaries, and Treasurer) are required to be active members of the chapter as defined in the Constitution and Bylaws.

Some chapters elect one of the advisors to serve as Corresponding Secretary. This officer is very important as far as HQ interactions are concerned, and an experienced person in the position is a tremendous help to the chapter. This is especially true in connection with our rather complicated new-member election and initiation procedure, and the essential and detailed reports to HQ that go with it. The counter argument is that having an advisor serve in this role deprives a student of what educational value the job carries and what leadership opportunities it presents. This matter, like most other chapter affairs, remains solely within the jurisdiction of the chapter.

Chief Advisor

Perhaps the most important job, but an unofficial one since it is not prescribed in the Constitution and Bylaws, is that of Chief Advisor for the chapter. Occasionally, it is necessary for HQ to transfer information to or from a chapter at times when school is closed for classes or the student officers are not available, such as the winter holidays or the summer recess. The Chief Advisor is normally the recipient of keys and certificates for initiates and as delivery agent for the instructional material mailed as school opens in the fall and before officers have provided Headquarters any address updates. The Chief Advisor may also serve as the Chair of the Advisory Board. The Chief Advisor should maintain communication with the District Director as a resource to assist with chapter challenges.
Chapter Guidance and Rewarding Interactions with Students

It is challenging in a rewarding way to help high-achieving students reach their potential. In your role as advisor, you should cultivate bonds with the students, not necessarily in a teacher-student way but more in a mentor-mentee way. Suggesting programs and projects to them or hearing their ideas for upcoming activities and giving feedback can set them up for success. Being there while they realize their plans, and then seeing and joining in on their success gives a great feeling of satisfaction.

One or more of the advisors should encourage the chapter president and other officers to set goals and objectives for the chapter at the beginning of the academic year. For example, an advisor may suggest a theme for community service projects such as working with K-12 through programs such as MindSET. Advisors may serve to assist chapter initiatives relating to an advisor’s specialties or interests. Additionally, one or more advisors could encourage social media engagement. Advisors of large chapters can encourage that committees be formed to address targeted goals.

In engaging with such chapter activities, it is important that advisors make suggestions and let the officers decide what to do and how to do it. As previously noted, the advisors should guide, oversee, and counsel.

This type of guidance from advisors is essential for the health of the chapter. When a chapter successfully achieves a targeted goal, it becomes very rewarding for the members and advisors.

Transition to New Officers

While informal, the Chapter Officer Installation Procedure provides a convenient and impressive opportunity for the official transfer of duties and properties from one set of chapter officers to their successors. It is both a retirement and inauguration procedure, and also includes provision for retirement and replacement of advisors. The procedure requires only that an Advisory Board presides during the ceremony, but you should make every effort to participate.

To ensure successful officer transitions, it is suggested that one of the advisors maintain a list of officer roles, procedures and the locations of files necessary for the chapters’ function. This can entail assisting current officers to identify and encourage potential new officers prior to elections.

Giving Association merchandise to retiring Advisors, chapter officers, and even outstanding chapter members is highly encouraged.

Chapter Awards

Each year, the Convention Awards Committee, comprising student delegates, review the information on chapters eligible for and nominate for approval by the Convention the winners of the R. C. Matthews Outstanding Chapter, the R. H. Nagel Most Improved Chapter, and the J.D. Froula Most Improved Membership Awards. Basis for judging includes the reports and projects of the competing chapters and evaluations of their performance by the chapters’ advisors. Therefore, your participation in helping the student officers complete the survey and its related project descriptions accurately and submitting it on time is critically important.

Encouraging Eligible Students to Accept Membership

On average, only around 25 percent of the students scholastically eligible as defined in the Constitution and Bylaws accept the invitation to join. The percentage tends to be higher for small schools and lower for large schools. A few chapters set an additional grade-point-average (GPA) value below which no student will be considered. This GPA cut-off is usually higher for juniors than for seniors and this must be documented in the chapter's bylaws. In all cases, the minimum GPA can only establish a more restrictive membership qualification than that required by the Constitution and Bylaws. As an advisor you should endeavor to convince all eligible students to accept election to membership.

Some chapters give annual prizes (such as a calculator, a textbook, or an engineering handbook) to the top-ranking students in the sophomore or freshman classes to promote awareness of the Association. Such prizes are traditionally awarded at the university honors convocation or at a chapter banquet.
An advisor should be delegated to obtain and properly distribute candidate lists. In this process, the advisor is encouraged to communicate with other faculty to garner eligible students’ interest in the Association and confirm the students’ character.

**Participating in Chapter Projects**

Nearly all chapters have one or more projects that they conduct each year. These are usually service activities, which are conducted for the benefit of the college or university. Experience has shown that such projects are indeed the life-blood of the chapter. You should actively support and participate in these chapter projects. Information about projects is available under Officer Resources on the Association website.

**Participating in Chapter Meetings**

Each chapter is expected to conduct regular membership meetings throughout the school year. Many chapters face attendance problems. You should make it a point to attend as many as possible.

There are several incentive mechanisms chapters use to encourage attendance. Some provide free food and drinks at their meetings. You can help by obtaining funding from the dean’s office to pay for the refreshments. Other chapters levy fines for missing important meetings without a valid cause, but this is not a recommended solution.

**Association and Chapter Relations with the College and University**

From a legal perspective, the Association and the chapter operate independently from the college and university. However, it is in the best interests that the parties work together in the common goal of ensuring high-achieving students reach their potential. These students help the college in many ways, from elevating classroom performance to outreach to future development. The college helps the students by recognizing them, supporting their programs, and granting them access to facilities. In a sense, it is a symbiotic relationship.

The advisor often finds themselves on the front line of representing the chapter to the college. The advisor has to “sell” the concept of Tau Beta Pi to the college and enlighten the college regarding what the possibilities are.

Advisors are key to managing conflicts between the university and the Association. As a liaison between the chapter and the university, you are likely to be the first one to identify differences between university and Association policies. In most cases, you will find a reasonable balance between the two policies.

There can be challenging scenarios where the advisor is “stuck” and not able to achieve a desired outcome. Other situations arise that may place an advisor who is a college employee in conflict with their role as an advisor. In such unfortunate situations, the advisor must remember they are not alone and they have Tau Beta Pi District Directors and Association officers who can step in and help.

**Rejuvenating a Faltering Chapter**

When chapter activity is severely ailing, the advisors should step in and provide leadership of "last resort." In such conditions, you may temporarily take a more hands-on approach to help reenergize the chapter. Assess the condition of the chapter (members, officers, finances) and identify the most crucial gaps needing improvement. If additional chapter officers are needed, you can work with your college and HQ to find student members willing to serve.

The Advisory Board should meet regularly, at least once at the beginning of each semester, to discuss ideas to get members interested in chapter meetings and activities. Consistent meetings and activities will help turn around a struggling chapter, and you should expect slow but steady growth (don't aim too high and don't get discouraged). Visible advisor involvement at social and professional development events is key during this time, as well as your patience and good humor.

For whatever reasons, sometimes a chapter may go dormant. It falls to the last group of advisors, or in the worst case, to the sole surviving advisor to resurrect the chapter. In such a case, an advisor should seek the help of neighboring chapters and District Directors and should obtain a list of members in the area. The advisor should determine which students are eligible to initiate, interact with HQ to arrange an initiation, use the local members to help with the initiation, conduct the initiation, report the results to HQ, and then engage the new members to be officers.