

Officer's Handbook

Revision of the President's Book

The Tau Beta Pi Association

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Knoxville, Tennessee 37901

www.tbp.org

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FORWARD

Fellow Tau Bate,

Congratulations on your election as an officer of your collegiate chapter! You are part of a long tradition of student leadership of Tau Beta Pi dating back to 1885. I welcome you to this important role and look forward to your hearty participation in guiding your chapter during your term of office.

Every TBPI chapter is unique. Some of you will be blessed to inherit the leadership of a thriving chapter. Some of you will be taking over a chapter that is doing well but is advancing to greater things. Unfortunately, some of you will be challenged with a chapter that is struggling and in need of strong leadership to thrive. Regardless of where your chapter is when you take over as a chapter leader, one thing is constant: you will only get out of it what you put into it!

From personal experience, I have seen chapters that were struggling just to remain active become superstars in less than a year. At the same time, outstanding chapters can fall apart in less than a year. The common thread with both groups is chapter leadership or the lack of chapter leadership. Your leadership will inspire and direct the course of your chapter during your time as an officer. It is critical to have a vision of where you want to go and what you want to achieve during your time as a chapter leader. This will help set the tone for your chapter and can encourage others to help advance your chapter.

You may be asking what tools are available to achieve greatness as a collegiate chapter leader? This Officer Handbook is just one resource in the TBPI toolbox. The purpose of this handbook is to help strengthen chapters by providing valuable information to guide new officers. However, you are not bound by anything within the handbook that isn't covered by the Constitution and Bylaws or Convention acts. The material in this handbook has been compiled by many Tau Bates who provided their knowledge and expertise to help you operate your chapter. The handbook is also intended to provide a framework for each chapter's individual, personalized guidebook. Traditions, policies, projects, and other chapter information should be carefully documented and included with the handbook. Pass this handbook and any additional information to your successors so they may build on your successes.

I also encourage you to leverage the people around you to succeed as a chapter officer. First, the Headquarters [team](#) in Knoxville is available at tbp@tbp.org or 865-546-4578. [District Directors](#) serve as additional resources at the regional level and are available to visit your chapter, answer questions, and provide advice. The [Student Advisory Board](#) (sab.officers@tbp.org) is made up of former chapter officers and leaders who are available to provide one-on-one guidance and recommendations. On the local level, never overlook your chapter advisors! They know the history of your chapter and play an important role in chapter continuity. Finally, consider asking your fellow officers and chapter members for help. Sometimes, people are just waiting to be asked to help!

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

Sincerely,



Curtis D. Gomulinski
Executive Director

ACKNOWLEDGEMENTS

The first edition of the President's Book (the forerunner to this Officer Handbook) was published in May 1940 by Secretary-Treasurer R.C. Matthews, IL A 1902. The material in it was collected and edited by successive presidents of North Carolina Alpha: E.J. Angelo Jr., NC A 1939, and Benjamin S. Pace, NC A 1940.

Succeeding editions drew on the experience of Association officials and chapter presidents. Revisions were made by these former Association officials: Assistant Editor of *The Bent* D.R. Briggs, MA Epsilon 1951; Editor of *The Council Bulletin* L.A. Cohn, IA Alpha 1951; Director of Chapter Development M.E. Van Valkenburg, UT A 1943; and Director of Chapter Development J.R. Young, IL A 1956. Assistant Secretary Treasurers F.F. Lyle Jr., TX A 1962; R.E. Warmack, MO A 1967; and D.J. Soukup, AZ A 1976, made important contributions to the book. Secretary-Treasurer R.H. Nagel, NY D 1939, and Executive Director James D. Froula, TN A 1967, provided oversight and editing of updated editions.

The Election Procedures Committee of the 1978 Convention, headed by D.T. Finegood, MI G 1978, and J.W. Johnson Jr., NC A 1977, provided material for the Eligibility Rules and Election and Initiation of New Members.

The President's Book was replaced by the Officer Handbook in 2020 through a multi-year effort by members of the Student Advisory Board (SAB). The work was spearheaded by SAB Chairs M.A. Childers, OH K 2016; S. Kannan, NY O 2017; P. Klomkaew, AL E 2018, and S.M. Trocchia, DC G 2011. Many members of the SAB aided in the revision process including E.L. Brooks, CT A 2020; L.N. Carver, OK A 2019; A.A. Jerger, OH K 2020; W.R. Strahl, UT B 2018; and N.J. Turco, NY S 2020. Headquarters team members A.B. Boles and C.A. Cross also contributed to the revision effort. District 7 Director L.H. Logan, OH D 2010, and Executive Director C.D. Gomulinski, MI E 2001, provided advice and recommendations on the final edition.

Information about the IRS Form 990-N and 990-EZ on page 27 was revised in April 2025.

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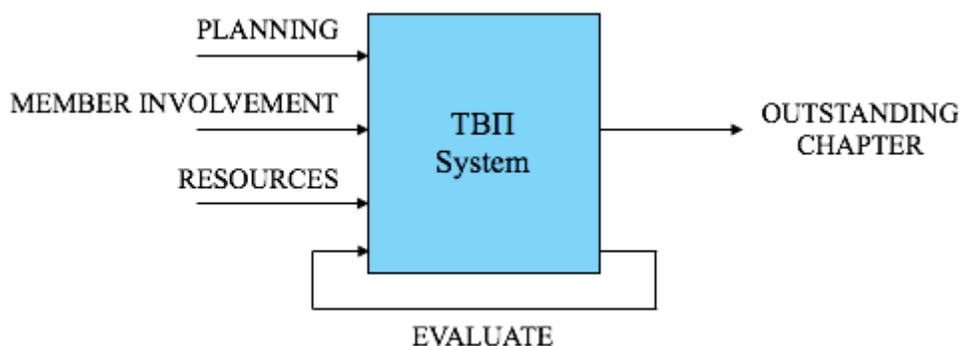
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Section A Introduction and Overview

I. Chapter Management: A TBII System

Welcome to the updated and condensed *Officer Handbook*, formerly the *President's Book*. The material within this document will define your role and duties as a chapter officer and make the job less daunting and more rewarding. Chapter officers of your school's TBII chapter are tasked with leading the charge.

All engineers, at some point in their academic journeys, have solved a feedback system, for better or for worse. Outside the classroom, we constantly iterate upon our decisions we choose each and every day, evaluating whether or not we have opted for the right path. The process flow for being a good President follows the same paradigm.



In the context of TBII leadership, three system inputs are evident: planning, member involvement, and resources. By processing these inputs and iterating upon the decisions you, your Advisory Board, and other officers make for your chapter—denoted as the feedback loop—you can produce an outstanding chapter.

Planning:

Sound planning leads to the success of any chapter. Certain goals and timelines should be established by the chapter at the beginning of each term. Quality over quantity is a good mantra to follow: try to schedule a few high-quality activities each term to keep your membership engaged. Additionally, select reasonable deadlines for completion of reports. Your chapter officers will volunteer for responsibilities more willingly if given a two-week lead-time rather than two days.

Member Involvement:

Motivated members contribute to the success of your chapter. Try different tactics to reach out to your member base. Organize a diverse set of activities to entice your members to continue their involvement. Good communication is critical in obtaining commitments from your members.

Resources:

There are resources available to you as a chapter officer, several of which are included in this document. Reach out to former officers, Advisors, and District Directors to ask about their past experiences with their chapter(s) and the Association. The team at TBPI Headquarters (HQ) is available to assist with any situation and has the resources to help you and your chapter succeed.

Tau Beta Pi
P.O. Box 2697
Knoxville, TN 37901-2697
Telephone: 800-828-2382 (1-800-TAU-BETA)
Email: tbp@tbp.org (for general TBPI inquiries)
chapters@tbp.org (for chapter-related inquiries)

Guide to this Document:

This document is a reasonably comprehensive compilation of material for quick referral.

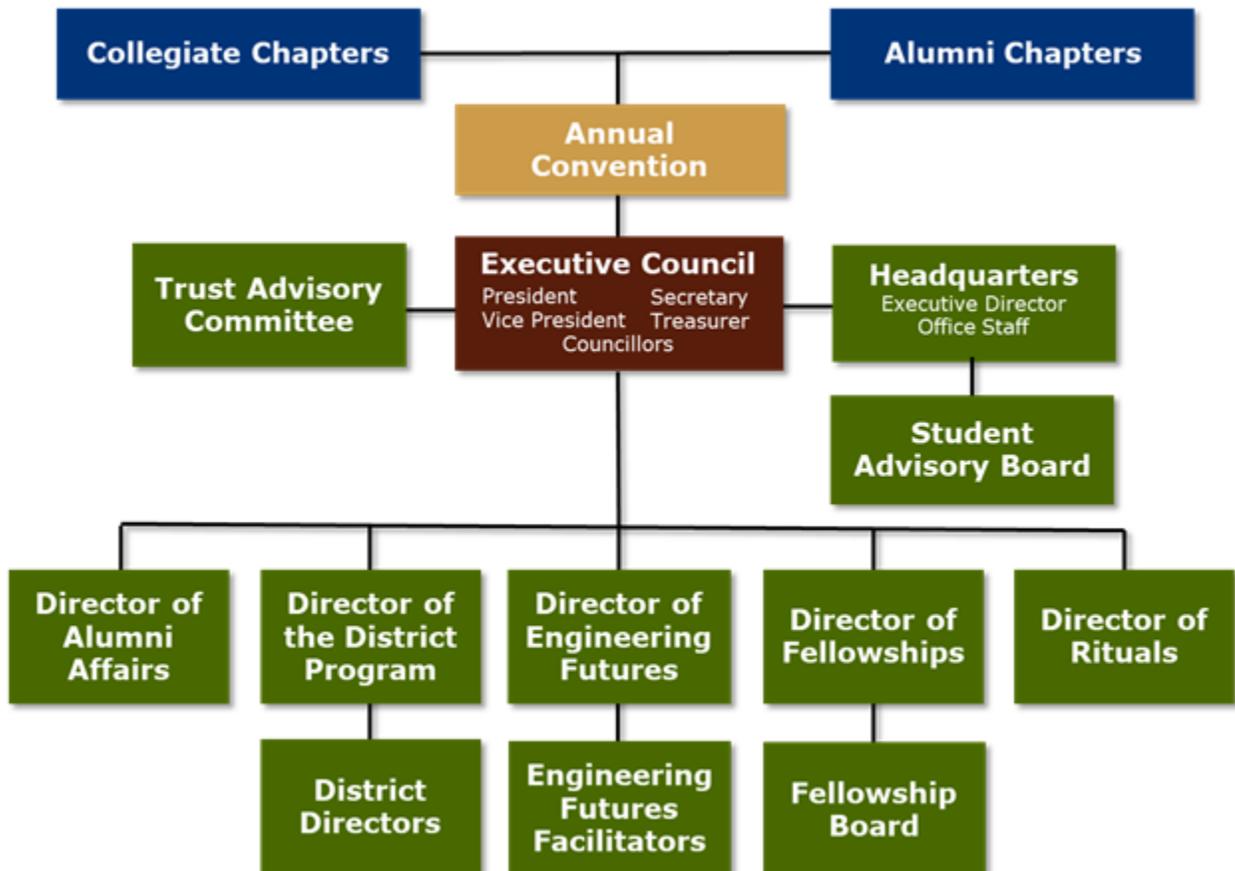
The structure of this document includes:

- Introduction and Overview
 - Chapter Management
 - The District Program
- Eligibility Rules, Election, and Initiation of New Members
 - Schedule for Election and Initiation
 - Determination of Eligibility
 - Election Procedure
 - Refusals of Election
 - Electees Initiated by Other Chapters
 - Summary of Headquarter Reports
 - Facts for Electees
- Chapter Operations
 - Duties of Officers
 - Election of Officers
 - Meetings
 - Committees

Note that references in this *Handbook* are hyperlinked to outside sources with their full address in the footnote of the page. Some references are made to resources listed in the Student Advisory Board's [Chapter Toolkit](https://tbp.org/off/Toolkit.cfm) (<https://tbp.org/off/Toolkit.cfm>).

II. TBII Association Overview

The governing structure of TBII is hierarchical. The graphic serves as an illustration of this principle.



The collegiate chapters carry out the Association’s activities at the local level. They bring new members into the Association and are tasked with carrying out our objective of marking “*in a fitting manner those who have conferred honor upon their Alma Mater by distinguished scholarship and exemplary character.*” All chapters send delegates to the annual Convention, which is the legislative body of the Association and the final court of appeals in matters of interpretation of the [Constitution and Bylaws](https://www.tbp.org/off/ConstBylaw.pdf)¹.

ADVISORS:

Advisors are integral to preserving the continuity of your chapter. TBII is a student-run organization, but the guidance you receive from your chapter Advisors will make your job much easier. Keep in mind that advisors are also chapter officers and play an important part of a collegiate chapter.

¹ <https://www.tbp.org/off/ConstBylaw.pdf>

THE CONVENTION:

The annual Convention, usually held in October, comprises one voting delegate of each of the collegiate and alumni chapters, members of the Executive Council, Executive Director, Director of Alumni Affairs, Director of Engineering Futures, Director of Fellowships, Director of Rituals, and District Directors. Reimbursable expenses for student voting delegates include travel, lodging, and meals. The Convention serves as the governing body of TBII in conducting the business of the Association and has the power to grant new chapters, elect Executive Council members, and amend the Constitution (subject to chapter ratification) and the Bylaws.

THE EXECUTIVE COUNCIL:

The Executive Council is akin to a board of directors of a corporation. The Council is a group 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 programs of Tau Beta Pi (TBII) through a full-time Executive Director, whose offices at the University of Tennessee are the Headquarters of the Association, and other Association Officials whom it appoints. All actions taken by the Council are reported back to the Convention. The Executive Council includes a President, Vice President, Secretary, Treasurer, and multiple Councilors. The Council elects its own officers. The size of the Council is set by the Convention and is between three and twelve members. Members are elected on an individual basis. 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:

The Headquarters of the Association is located on the campus of The University of Tennessee in Knoxville and have 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, team leads for each of the major areas of responsibility, and accompanying staff members. A summary of the HQ staff and their associated roles is located [here](#)².

PROGRAM DIRECTORS:

The [Program Directors](#)³ are appointed by the Executive Council to oversee major programs of the Association. They include the: Director of Alumni Affairs, Director of the District Program, Director of Engineering Futures, Director of Fellowships, and Director of Rituals.

III. The District Program & District Directors

TBII chapters have historically been divided into geographical districts since 1976, with the number of districts last updated to sixteen in 1999. Your chapter's members have the opportunity to take part in TBII affairs beyond your chapter, making them feel part of a larger organization.

² <https://www.tbp.org/about/hqStaff.cfm>

³ <https://www.tbp.org/about/otherOfficials.cfm>

An interactive district map can be found [here](#)⁴.

The focus of the District Program is to strengthen the collegiate chapters. Your 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 bring attention to basic principles of running a voluntary membership organization. Responsibilities of the District Directors include: visits to chapters, District Conferences, attending the annual Convention, consulting on chapter management problems, participating in chapter functions, setting up alumni contacts, and stimulating your chapter. More details about the District Program are [here](#)⁵.

Chapters host District Conferences in the winter or spring to bring together new and outgoing officers and Advisors of nearby chapters for seminars, networking, panel discussions, and round-table workshops. Travel expenses are typically reimbursed for those members attending conferences.

⁴ <https://www.tbp.org/about/InfoBook/districtMap.cfm>

⁵ <https://www.tbp.org/memb/district.cfm>

Section B Eligibility Rules, Election, and Initiation of New Members

The election and initiation of new members comprise TBII's "circle of life," which dictates that increased membership promotes new leadership, more active engagement in events, and an enhanced image on your campus.

Elections fulfill our Association's 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.*" A person who meets TBII's scholarship requirements has **automatically** earned the right to be considered for membership.

However, scholarship achievement is not the sole determining factor of a candidate's eligibility. Rather, it is contingent upon the chapter's evaluation of the candidate's character. The chapter must measure each candidate against the Eligibility Code and then decide to either elect or reject the candidate accordingly. Chapters may choose procedures for qualifying the character of a given candidate and voting mechanisms for elections at their discretion. Specifically, Const. Art. III, Sec. 2(a)⁶ states: "*Each chapter shall require student candidates to participate in activities recommended or approved by the chapter officers to assess exemplary character or foster a spirit of liberal culture.*" These procedures must be approved by the Executive Council through the office of the Executive Director and must be written into the chapter's bylaws.

The procedure chosen by each chapter must definitively accomplish three things:

1. It must determine the basis of 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 (active) membership body.

Because of the significance of elections in an honor society, the Constitution and Bylaws sections covering elections require special scrutiny and attention. It is paramount to follow these rules and procedures to ensure fair and equal treatment of all candidates.

All elected candidates must attend an initiation ceremony to become a member. Chapters are encouraged to prepare for the ceremony beforehand. This includes ensuring your ritual is up to date. Encourage chapter members, Advisors, District Directors, and other esteemed members to attend. If your Dean is a TBII member, extend an invitation to the Dean; the presence of the Dean at the Initiation emphasizes the breadth and importance of the Association. Non-members are not allowed at the ceremony.

This section of the *Officer Handbook* is designed to walk you through the conduct of elections and initiations for your chapter. If you have any questions, contact HQ. **A CHAPTER SHOULD NEVER HOLD AN UNAPPROVED INITIATION!**

⁶ In keeping with the verbiage in the hyperlinked Constitution and Bylaws, references to Constitution Articles are abbreviated as 'Const. Art.'

I. Schedule for Election and Initiation

- A. Before the start of the semester, schedule a meeting with your chapter officers and Advisory Board to plan meeting times for the semester and select a schedule to follow. There are four semester schedules on the TBII website, which include tips for a successful semester and initiation. They include: [12 Week⁷](#), [12 Week Alternate⁸](#), [10 Week⁹](#), and [10 Week Alternate¹⁰](#). Once your initiation date has been determined, reserve a private room which fulfills the requirement listed in the ritual to hold your initiation.
- B. Begin work on determining scholastically eligible juniors and seniors at the earliest possible date. As soon as school starts, obtain the names of candidates from the dean's office, registrar's office, or school of engineering, or reach out to a chapter faculty Advisor who can obtain the list for the chapter. A membership committee/officer position, which should include members from each engineering department, can be created for this function to minimize the possibility of overlooking anyone. Depending upon university requirements, this duty might fall to an Advisor that is also a faculty member. In many universities, the Advisor will request a list from the registrar and remove sensitive information including the student's GPA before sending the list to the chapter officers. If possible, compile the lists of eligible undergraduate candidates for the fall term during the summer; for the winter or spring term, compile immediately after the fall term has ended.
- C. Immediately after the data has been compiled, the Corresponding Secretary should submit the [Report of Eligibility¹¹](#) via a spreadsheet emailed to eligibility@tbp.org. If your chapter is small, you can complete the Report of Eligibility directly in the [Electronic Reporting System¹²](#).
- D. Determine which method of measuring exemplary character your chapter uses. Your chapter should have an established and approved character-measurement procedure, e.g. application forms or interviews. Const. Art. III, Sec. 1(a) requires that your procedure be contained in your chapter bylaws.

If your chapter does not have a procedure for measuring exemplary character, you need to establish one. [Appendix 1.1](#) describes several types of procedures that can be used. If these are not suitable, develop your own procedure. The one you use, however, must be submitted to and approved by the Executive Council before it is included in your chapter bylaws.

- E. Receive email acknowledgment of the Report of Eligibility and judgment of the technical eligibility of graduate students, alumni, and eminent engineers from HQ. In the absence of a confirmation email, contact HQ and cc your District Directors. Confirm the reservation of the initiation room, equipment and AV requirements, and seating and tables.

⁷ <http://tbp.org/off/12weekSchedule.cfm>

⁸ <http://tbp.org/off/12weekScheduleAlt.cfm>

⁹ <http://tbp.org/off/10WeekSchedule.cfm>

¹⁰ <http://tbp.org/off/10weekScheduleAlt.cfm>

¹¹ <https://www.tbp.org/off/excelInstructions.cfm>

¹² <https://www.tbp.org/tbpelig>

- F. Hold the election meeting, utilizing the election procedure written in your chapter's bylaws. Refer to section [III. Election Procedure](#) for further details.
- G. Keep all notes and records concerning each candidate until their last time of eligibility for election has passed. A suggested method of tracking each candidate is by creating a spreadsheet to note completion of any requirements your chapter has set for election, such as mandatory events or character evaluation.
- H. Send a letter or notice of election to each candidate—electronically or otherwise—which includes a time and date for a first meeting with elected candidates. If no meeting is required, ensure the notice includes all information as the candidates move towards initiation. To avoid misunderstanding about the nature and purposes of TBII, the chapter may want to include a Candidate Packet with its letters. These packets, free from HQ, can be ordered via the [TBII Store](#)¹³. Send a polite letter of rejection to all candidates not elected who were aware they were being considered. The letter or notice should include:
1. Information regarding the chapter, initiation, amount of initiation fee, and what is covered by the fee. Other important facts should be reviewed with electees and are found in [Appendix 2.3](#).
 2. Ask electees who wish to accept election to do so in the manner your chapter has set forth; if any electees refuse membership, you should ask them to state their reasons for refusing.
 3. Provide a set of Electee Materials (Constitution and Bylaws, Information Book) and a copy of your chapter bylaws to each electee who accepts election prior to initiation. These items are free and can be ordered on the Report of Eligibility or from the [TBII Store](#)¹³.
 4. Have each electee—including graduate students, alumni, and eminent engineers—complete the online [Catalog Cards](#)¹⁴. **EMPHASIZE TO THE ELECTEES THAT THE CATALOG CARD IS A PERMANENT RECORD. TBII MUST HAVE FULL LEGAL NAMES (NO INITIALS) RECORDED 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 fill out the catalog cards. Catalog cards can be sent to electees via the online system, but the letter/notice should include a deadline for completion. To avoid delays in report processing, catalog cards may be filled out by candidates for membership prior to election.
- I. Immediately after electees have accepted election and submitted catalog cards, the Corresponding Secretary should submit the [Report of Election](#)¹⁵.
- J. Receive email approval from HQ to initiate the electees listed on the Report of Election. **DO NOT INITIATE ANYONE WITHOUT SPECIFIC APPROVAL FROM HQ; IF APPROVAL IS NOT RECEIVED, CALL HQ PRIOR TO HOLDING YOUR INITIATION (See Const. Art. IV, Sec. 1).**

¹³ <https://tau-beta-pi.myshopify.com/collections/chapter-materials>

¹⁴ <http://www.tbp.org/catalogcard/>

¹⁵ <https://www.tbp.org/off/membershipSubmit.cfm#Election>

- K. Keys, membership cards, and certificates should reach you within two or three weeks after the catalog cards and Report of Election have been submitted to HQ. These items are ordered from the information on the catalog cards. If the name on a key or certificate is incorrect because of inaccurate information on the catalog card, the chapter is responsible for the cost to reorder for the individual. Orders are sent directly from the vendors to the address you provide on the online system. See [section C.I.C.1.c](#) for additional information.
- L. Hold the formal Initiation Ceremony.
1. Select the initiation team with care. You may ask your Advisors to serve in addition to other chapter officers, accomplishing two purposes: (1) it brings them into closer contact with the chapter and (2) it serves to convey the importance of TBII to the new members.
 2. The officer 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 ceremony is designed to impress new members with the seriousness of purpose of TBII and, therefore, deserves appropriate preparation.
 3. Distribute the parts well in advance of the initiation and conduct a rehearsal before the ceremony. Ensure everything is ready and everyone knows their role before proceeding with the initiation. The ceremony should be a meaningful introduction to TBII that unites the new members with current members. Follow the instructions included with the ritual, rehearse the ceremony, and check all equipment. Ensure you have the most current version of the ritual! If not, contact HQ with sufficient time prior to the Ceremony.
 4. You can have a major positive impact upon the image of TBII by arranging a special program for non-member guests, concurrent with the ceremony, in a location near the initiation room. A reception or meal following the ceremony for friends and family to celebrate the new members also improves TBII's image and allows for recognition of new initiates. Other chapter members, District Directors, Deans, Advisors, and local Alumni Chapters should be invited to this event.
 5. **In an event of an emergency such as a natural disaster, property damage, disease outbreak, etc.,** chapters can appeal to HQ and request an online initiation. If there is not an Association wide availability of online initiations, like there was for the 2020-21 academic school year during the COVID-19 pandemic, then please contact chapters@tbp.com to discuss preparations for an online initiation if it is needed at your chapter for a specific semester.
- M. Immediately following initiation, the Corresponding Secretary should submit the Report of Final Action online along with the Roll Book signatures to HQ. An initiation invoice is available immediately after the Final Action is submitted. The Treasurer should arrange payment of the initiation fees within two weeks of initiation. Options include mailing a check or [contacting HQ](#)¹⁶ to pay by credit card. NEVER SEND CASH. Chapter statements are available online and also emailed to each chapter President, Treasurer, and Chief Advisor showing all charges, credits, and balances due.

¹⁶ email accounting@tbp.org

- N. Receive email confirming receipt of the Report of Final Action from HQ, which is the official recognition of your initiation. Check the acknowledgment email for agreement with your chapter records. Ensure you follow any procedures your university may have to inform them of the initiation of new members. Some universities request a list of new members from the chapter after each initiation, signed by the chapter President and Chief Advisor.

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 the new members receive their keys and certificates before leaving school.

Reference Summary:

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

[Report of Eligibility¹⁷](#)

For sample procedures regarding character evaluation, see [Appendix 1.1](#).

[Report of Election¹⁸](#)

For important facts to review with electees before initiation, see [Appendix 2.3](#).

For explanation of initiation fee, see [Fees and Dues](#).

[Report of Final Action¹⁹](#)

¹⁷ <https://www.tbp.org/off/requiredReports.cfm#Eligibility>

¹⁸ <https://www.tbp.org/off/membershipSubmit.cfm#Election>

¹⁹ <https://www.tbp.org/off/membershipSubmit.cfm#FinalAction>

II. Determination of Eligibility

A. Scholastic Eligibility

1. *For Undergraduate Students*

- a. Juniors—upper-eighth of the engineering disciplines specified in your chapter bylaws is eligible (Const. Art. II, Sec. 2(b)).
- b. Seniors—upper-fifth of the engineering disciplines specified in your chapter bylaws is eligible (Const. Art. II, Sec. 2(d)).

Const. Art. II, Secs. 2(c) and 2(e) describe 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 classified as *engineering* juniors by your institution.

The procedures followed by individual chapters should be clearly defined in your own chapter bylaws, which must list all eligible engineering programs at your institution. For example, transfer students are typically ineligible until the third election after they transfer to your school (Const. Art. II, Sec. 2(h)). Until the proper time, either (A) do not include them on the list of eligible students or (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).

Postponed electees from one semester must be listed on the Report of Election the following semester even if they are not listed on the Report of Eligibility due to falling outside the academic requirements in the following semester. These eligible candidates may be initiated at the next regular election without re-election. Postponed electees who do not appear on the list of eligible students must have been approved by the chapter's Advisory Board the prior semester before HQ adds them to the Report of Election.

Grades of Condition or Failure

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). The important thing is that candidates *now* possess a scholastic record which places them in the upper fifth or eighth of the class during their senior or junior year.

2. *For Graduate Students—see Const. Art. II, Sec. 3.*

Graduate students are eligible for election to membership under the provisions of Const. Art. II, Sec. 3. Eligible candidates must have completed fifty percent of **ALL** degree requirements and must stand in the top fifth of the graduate engineering class. If such class standing information is unavailable, a faculty member must certify the graduate work is of the quality expected of a member of the Association. The eligibility of a graduate student is thus based solely on documented graduate work in engineering at his or her institution. Members' TBII class, engraved on the key and engrossed on the certificate, is the year in which they will receive their graduate degree.

Separate [paperwork](#) must be submitted for these candidates.

3. *For Alumni—see Const. Art. II, Sec. 4.*

Candidates eligible as alumni are defined to be people who hold an engineering degree and who were or would have been eligible for election to TBII as undergraduate or graduate students under one of the provisions of Const. Art. II, Secs. 2 or 3.

Eligibility for candidates who are alumni is based upon the scholastic performance as undergraduate or graduate students.

Candidates may be eligible as alumni or as eminent engineers, depending upon the engineering degrees earned and the schools attended. Details on eligibility requirements are below.

Those that are being considered for election who are not graduates from the initiating institution must receive a letter from the person's alma mater chapter stating that there is no objection to the candidate's election, as stated in Const. Art. II, Sec. 4(b).

Further eligibility requirements for both alumni and eminent engineering candidates are listed below.

4. *For Eminent Engineers—see Const. Art. II, Sec. 5*

An eminent-engineer candidate is defined to be a practicing engineer who has achieved distinction by professional attainments and who may hold one or more degrees. These candidates should be the embodiment of who members and eligible students strive to become in their engineering career.

Eligibility for an eminent-engineer candidate is based upon one's professional attainments over a period of at least ten years for those with engineering degrees or fifteen years for those without engineering degrees but, instead, have work experience in the field of engineering.

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

A candidate may be eligible as an eminent engineer, depending upon the engineering degrees earned and the schools attended. Further, qualifications to become an eminent engineer candidate would be expected to excel in a combination of the following areas:

- A. Demonstrated evidence of creative and/or scholarly work:
 - a. Active in research, design, or multifaceted, large-scale engineering management
 - b. Publications in recognized refereed journals
 - c. Textbooks and monographs
 - d. Invited lectures at conferences and symposia

- e. Citations by others of research results
- f. Patents
- g. Innovative designs or engineering management schemes
- B. Excellence in the workplace:
 - a. Development of methodology/techniques
 - b. Recognition by peers with appropriate awards
 - c. Major projects/processes/products
 - d. Attainment of accomplishments common to senior status
- C. Leadership/active in professional/technical organizations and/or honor societies:
 - a. Emphasis on sustained activities
 - b. Officer, director, or key committee person
- D. Consultant:
 - a. Serve industry, government, and academia.
- E. Community service/leadership:
 - a. Church or civic organizations
 - b. Citizen boards and committees

Further eligibility requirements for both alumni and eminent engineering candidates are listed below.

5. *Additional Requirements for Both Alumni and Eminent Engineers—see Const. Art. II, Sec. 6*

Candidates for membership as alumni or as eminent engineers must meet the general requirements set forth in Const. Art. II, Sec. 6. The information called for in Const. Art. II, 6(c), must be provided before the election of any such candidate can be approved by HQ. “Complete proofs,” as requested in this section, must include a list of colleges which the candidate has attended, degrees earned including years granted, evidence that the candidate was eligible as an undergraduate or graduate student (for a candidate to be elected under Const. Art. II, Sec. 4), outline of the candidate’s professional record, and written approval of the chapter’s Advisory Board to elect the candidate. **This information should be sent to HQ on [special paper reports](#)²⁰ to be used for these candidates which are available for download online.**

²⁰ <https://www.tbp.org/off/SectionEligibility.pdf>

If you are unsure of where a candidate belongs, the outline below will assist you in determining which sections of Const. Art. II they are eligible.

- A. If the candidate was in the top fifth of the undergraduate or graduate engineering class or was otherwise eligible under Const. Art. II, Sec. 3:
 - a. At a school which did not have a chapter of TBII when the candidate attended
 - i. Candidate is eligible under Const. Art. II, Sec. 4(a)(1).
 - b. At a school which had a chapter when the candidate attended:
 - i. Candidate is eligible under Const. Art. II, Secs. 4(a)(2), 4(a)(3), 4(a)(4) or 4(a)(5).
 - ii. For candidates not being elected at their alma mater, you must also follow Const. Art. II, Sec. 4(b). You must get letters of release from their alma maters stating that, upon investigation, they find no objection to the candidate's election.

- B. **If the candidate holds an engineering degree from any recognized engineering school but was not in the upper fifth of the graduating class**, the candidate is eligible under Const. Art. II, Sec. 5(a), if the candidate is now working in the field of engineering and has at least ten years of experience working in engineering. Eligibility is based upon attainments as a practicing engineer.

- C. **If the candidate does not hold an engineering degree**, the candidate is eligible under Const. Art. II, Sec. 5(b), if the candidate is now working in the field of engineering and has at least fifteen years of experience working in engineering. Eligibility is based upon their attainments while practicing in the field of engineering.

Note: The TBII class for a candidate elected under Const. Art. II, Secs. 4 or 5(a) is the year of graduation with his/her first engineering degree. The TBII class for a candidate elected under Const. Art. II, Sec. 5(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.

B. Evaluation of Character

TBII believes a person worthy of membership must exhibit two qualities—**distinguished scholarship and exemplary character**. In this section, we will review how to evaluate the character of eligible candidates before electing them and formally offering membership. The task of evaluating character and voting on candidates for election is restricted to the active student members of a chapter because TBII believes that measurement of character is best done by one's peers. Faculty and other alumni may be invited to contribute to the character-measurement and election processes, but the final decision on offering membership is **at the discretion of the student members**. The student members must know the eligible candidates personally, or they must devise a procedure by which they obtain enough information about the unfamiliar candidates to cast intelligent votes. There is not a single right way to evaluate a candidate's character; however, some suggestions are below.

1. For small chapters (30 or fewer eligible members), the chapters rely on the opinions of chapter members who know a particular candidate and can testify to the candidate's character. This works well for closely knit engineering schools.
2. In larger schools and chapters, it is still important to get to know the candidates personally, but sometimes eligible candidates are unknown to any chapter member, and other means of character evaluation are called for. Some methods include: host receptions to which candidates are invited, ask candidates to submit written resumes of their extracurricular activities or statements of purpose, request recommendation letters from an employer or faculty member, or conduct interviews of the candidates.

Care must be taken not to place a candidate in the role of supplicant; each scholastically eligible candidate has earned the right to consideration for membership. It is the chapter's responsibility to evaluate the candidate's character, not the candidate's responsibility to plead worthiness.

Refer to the Eligibility Code in the Constitution and Bylaws for guidance on character evaluation.

III. Election Procedure

Elections take place after candidate eligibility requirements are met and the candidate has been judged on their scholastic ability and exemplary character. The election is not accomplished by "automatic" means by lack-of-objection assumptions or by default of chapter action. It is a deliberate action and explicit act taken by the chapter.

There are three approved methods for voting on candidates:

1. The traditional procedure, where candidates are discussed and voted on individually.
2. The bloc-voting procedure where candidates are voted on in groups.
3. Other procedures listed in the chapter's bylaws which have received prior approval by the Executive Council.

Applicable to all chapter election meetings: At least **three-fourths** of the active members of the chapter must be present to constitute a quorum (Const. Art. VII, Sec. 6(a)(2)). 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 (Const. Art. III, Sec. 3(b)(3)).

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 exercise Const. Art. VII, Sec. 2(c), which permits its Advisory Board to declare absent members inactive, thus reducing the number of members required for a quorum. Members may be declared inactive by a five-sevenths affirmative vote, or as specified in the chapter's bylaws. Inactive members are excluded only from those rights and privileges that the Constitution and Bylaws specify for active members. However, a long-term solution to the quorum problem will involve a more careful selection of members and a review of chapter operations.

Inactive members are excluded only from those rights and privileges that the Constitution and Bylaws specify for **active members** (Const. Art. VII, Sec. 1). The rights and privileges limited to active members are:

1. Serving as Convention delegate
2. Discussing chapter fines
3. Serving as and voting for chapter officers
4. Being counted in quorum
5. Voting on new members

The following are all of the reasons an eligible candidate may not be elected according to the current Report of Election:

1. A1, Candidate was known to have no interest in membership
2. A2, Candidate did not respond
3. B, Candidate does not meet the exemplary character requirements of the Eligibility Code
4. C, Candidate is not technically qualified because of transfer-student rule or other restrictions under Const. Art. VII, Sec. 2 and Bylaw VI, Sec. 6.02(e)
5. D, Candidate was on Co-op or below chapter deadline and was not contacted

Sample election methods and procedures can be found in [Appendix 1.2](#).

IV. Refusals of Election

When an elected candidate refuses election, an effort should be made to discover the reason. Typically an eligible student would refuse election for one of two reasons: (1) lack of interest and (2) financial.

Lack-of-interest refusals do arise from misunderstandings as to the type of organization candidates are being asked to join, and are often informed in a personal conference. At other times, electees refuse to accept membership because they feel 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. If the candidate changes their mind in the future, the candidate would then have to remain eligible and be elected again before being initiated. Chapter presidents should make every effort to ensure chapter projects are worthwhile, relevant, and constructive and that electees are not required to perform menial tasks which tend to degrade them.

No electee should be prevented from becoming a member of TBII because of inability to pay the initiation fee. Const. Art. III, Sec. 7 requires financial reasons for refusal to be reported to HQ on the Report of Final Action. In the case of financial hardship, TBII provides [student loan](#)²¹ support.

²¹ <https://www.tbp.org/memb/studentLoans.cfm>

Postponed and Financial Refusal Electees:

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

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

1. Military duty
2. Death in family
3. Personal accident or illness
4. Natural disaster
5. Employment work schedule
6. Job interview

You may also document and report that a person's postponement is **unapproved**. Refer to the options explained on the Postponed Electee list.

In the case of electees who are unable to attend an initiation due to scheduling conflicts, chapter leadership should make every effort to support their initiation at another chapter.

V. Electees to be Initiated by Other Chapters

Elected TBII members may be initiated by other chapters. See [Appendix 1.3.2](#) for sample procedures and methods.

VI. Summary of Headquarter Reports

This section is designed to assist the Corresponding Secretary in preparing chapter's reports to HQ each academic year as required by Const. Art. VII, Sec. 10(d). All undergraduate membership reports should be submitted electronically online at www.tbp.org/tbpeilig.

The template found in [Appendix 2.2](#) provides details for each required report, recommended guidelines to complete each of them in a timely manner, and due dates. All reports are hyperlinked in the appropriate appendices.

Discipline Policy for Unapproved Initiations

A chapter which conducts two or more unapproved initiations within two years or which fails to conduct one approved initiation during one year shall be placed on probation until the end of the next Convention (Const. Art. XII, Sec. 3(a)(2-3)).

If placed on probation, a chapter will incur penalties as deemed appropriate by the Council or the Convention (Const. Art. XII, Sec. 3(d)).

The chapter's probation will continue until either:

1. A vote is taken by roll-call at the next Convention. By a three-fourths vote, the chapter's probation may be continued or its charter may be withdrawn. If the probation is continued, the chapter will be required to explain why its charter should not be withdrawn at the next Convention. (Const. Art. XII Sec. 3(b)(1))
2. The chapter completes one year of successful operation, including at least one approved initiation. If the Council does not end the probation after one year, the chapter may appeal to the Convention. (Const. Art. XII Sec. 3(b)(2))

VII. Facts for Electees

The 2008 Convention Committee on Rituals recommended that initiates be informed on what to expect during an initiation ceremony. The information below should be provided to electees prior to their initiation. The information is also available as a printable document for distribution in [Appendix 2.3](#).

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 we require our members to read the Association's Constitution and Bylaws, Code of Ethics, and Eligibility prior to being initiated.

According to the Merriam Webster Dictionary, a creed is "a set of fundamental beliefs; a guiding principle." Solemn means "marked by the observance of established form or ceremony." Finally, to promise is "to pledge to do, bring about, or provide." As indicated by these definitions, TBII is using these words in a context which correlates with the history of the organization.

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 TBII 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.

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
3. Solemn—marked by the observance of established form or ceremony
4. Promise—to pledge to do, bring about, or provide

More information about the intended meaning of phrases within the initiation ritual can be found in the [2008 Convention Minute²²](#)

²² <https://www.tbp.org/conv/2008/Minutes.pdf>

Section C Chapter Operations

I. Duties of Officers

A. Regular Chapter Officers

The chapter officers must be active members in the technical sense of Const. Art. VII, Sec. 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. Some chapters have also combined Corresponding and Recording Secretary roles through a provision in their bylaws (Const. Art. VII, Sec. 8(d)). The duties of chapter officers are specified by Const. Art. VII, Sec. 10 and a chapter's bylaws. Additional roles may be added under Const. Art. VII, Sec. 8(c), or the officers may wish to form committees for additional support.

There are several responsibilities which are not strictly assigned to a specific officer, but may be carried out by the officers working together or designating a leader for each task:

1. *Chapter Records*

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, correspondence, and emails should be maintained in the chapter records.

Consider storing membership lists and important documents from meetings and TBII-related activities in physical folders or electronically on a flash drive or Google Drive, shared with the current officers and Advisors. If saved electronically, this can be accessed anywhere and available at any time. The folders could include: (1) Current Business, (2) Prior Year's Business, (3) Chapter Projects, (4) Chapter Surveys, (5) Initiation Data, (6) Membership, (7) Eligibility Records, (8) Miscellaneous.

Additionally, all chapters should have a file containing [job descriptions](#)²³ for chapter officers. You may build from the basic descriptions provided in Const. Art. VII, Sec. 10 to include the duties traditionally assigned to your chapter's officers.

Older files can be moved to permanent storage. At the end of each year, move the previous year's business to a folder marked "Business, 20XX"; current matters are then moved to "Last Year's Business".

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!)

²³ Chapter Toolkit: Guide to Leadership Structures for Chapters

A private chapter office is a proper 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, storage space may be available in the office of an interested faculty member. The chair of the Advisory Board could be the regular custodian of the TBII ritual; it is not advisable to have a student member store these items.

2. Chapter Survey and Project Reports

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. As such, 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 sufficient resources and member engagement feel that such projects further TBII's visibility and they are a responsibility of intellectual *noblesse oblige*. The Association is in full agreement and encourages (and rewards) local chapters to carry out meaningful projects. It also recognizes that many cannot engage in service activities due to insufficient numbers of engaged students or because their members are already involved in service through other organizations. Chapters should be realistic about the commitments they take on in order to avoid beginning projects they cannot complete. Some chapters ask electees to complete questionnaires concerning their interest in possible chapter activities, which has often resulted in meaningful projects. Projects should be contributions to the achievement of a definite end. Deans, chapter Advisors, alumni, and others are excellent sources of ideas. [Popular²⁴ projects²⁵](#) include:

- a. Tutoring of underclassmen.
- b. Participation in freshman orientation.
- c. Participation in engineering open house or Engineers Week.
- d. Sponsorship of lectures, including Fundamentals of Engineering exam reviews.
- e. Engineering Futures.
- f. K-12 STEM and MindSET.
- g. Building and maintaining chapter websites.
- h. High-school visitations for engineering "recruitment."
- i. Outstanding engineering faculty and student award presentations.
- j. Sponsorship of scholarships to outstanding students.

One important yearly task is the completion of the annual Chapter Survey and the compilation of the annual Project Reports of activities. Both the Chapter Survey and Project Reports are used as diagnostic tools to inform HQ of a chapter's activities and projects in order for the team to detect problem areas and recognize chapter accomplishments. 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. Project Reports can be completed via [this²⁶](#) online portal.

²⁴ Chapter Toolkit: List of Cost-Free Chapter Events

²⁵ Chapter Toolkit: Activities that Engage Members

²⁶ <https://www.tbp.org/projreport/home.cfm>

The Chapter Survey and Project Reports can be used to provide guidelines for a smooth transition for both your succeeding officers and the Advisory Board. In addition, they provide factual information that is used by the Convention Awards Committee in its evaluations. The Survey is due June 1. Keep a copy of the Survey and Project Reports in your chapter files.

Instructions and recommendations from previous Awards Committees on submitting Chapter Survey and Project Reports can be found [here](#)²⁷. Further guidance can be found on the online portal.

The 1987, '96, and '99 Convention Awards Committees offered these guidelines:

- a. Chapters should identify the target audience in each project report.
- b. Chapters should indicate which projects are new and which are old.
- c. Chapters should specify the total number of participants and 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. A list of participants and the project area covered should be included with each project report. 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.
- d. 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, fliers, and letters from faculty and staff.

3. *Convention Delegate Information*

The Convention is made up of one voting delegate from each of the collegiate and alumni chapters, non-voting delegates, members of the Executive Council, and Association Officials. The Convention is financed through a portion of each new member's initiation fee, investment earnings of the Convention Fund, sponsorships and recruiters, and general alumni donations.

Travel expenses will be paid for one voting delegate from each collegiate chapter; non-voting delegates and advisor's travel expenses are *not* paid by TBII. However, one non-voting delegate per chapter may be reimbursed 20 percent airfare up to a maximum of \$200.

The Convention is typically held in October each year. Available in February, the Convention Credentials report must be submitted in the online reporting system to provide HQ with contact information of the voting delegate and alternate. Voting delegates must register by the June 1 deadline and submit travel information by September 1. All other attendees must be registered by August 1.

²⁷ <https://www.tbp.org/off/surveyGuidelines.cfm>

Headquarters will provide periodic email updates about Convention in the months leading to the event.

Following Convention, all delegates (including voting and non-voting) will be asked to complete the Convention Delegate Expense Report, providing expenses and requesting reimbursements. This report is required for each voting delegate even if no expenses were incurred. Furthermore, the official Minutes are posted for all delegates reporting the Convention business to their chapters, as required by the Bylaws. Following the amendments approved by the Convention, each collegiate and alumni chapter is required to vote (by three-quarter vote) on the Ratification Ballot with a quorum present and submit the Constitution Ratification Ballot, usually by April of the next year (e.g. [2018 ballot²⁸](#)).

B. The Advisory Board

1. General Responsibilities and Authority

The full Advisory Board consists of four Advisors and the President, Vice President, and Corresponding Secretary of the chapter. It draws authority and responsibility from Const. Art. VII, Sec. 11: *“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, may forbid any such action, subject to an appeal to the Council.”*

While only four Advisors serve on the Advisory Board, a chapter can have more than four advisors to help guide the chapter. 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 Advisors to supervise the detailed work; however, they have the responsibility 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. The Advisory Board should hold regularly scheduled informal meetings, perhaps several times per school term, but at least once per term to discuss chapter operations and problems.

Chapter officers should decide who is in charge of communicating with HQ during breaks and officer transition.

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:

²⁸ <https://www.tbp.org/conv/2018/2018-Ratification-Ballot.pdf>

- Term of office and time of election: Const. Art. VII, Sec. 9(a)
- Chapter Bylaws: Const. Art. VII, Sec. 4
- Eligibility of non-ABET/EAC curricula:
 - Curricula under jurisdiction of a unit of engineering: Const. Art. II, Sec. 1(a)
 - Appealing non-ABET/EAC curricula: Const. Art. II, Sec. 1(b)
 - Exclusion of non-engineering curricula: Const. Art. II, Sec. 1(c)
 - Irregular curricula: Const. Art. II, Sec. 2(i)
- Eligibility of undergraduate-student candidates:
 - Transfer students: Const. Art. II, Sec. 2(h)
 - Irregular standing students: Const. Art. II, Sec. 2(i)
 - Special elections and initiations: Const. Art. III, Sec. 3(c)
- Eligibility of graduate-student candidates:
 - Statement of worthiness: Const. Art. II, Sec. 3(b)(2)
- Eligibility of alumnus and eminent-engineer candidates:
 - Approval of alumnus electees: Const. Art. II, Sec. 6(c)
- Election procedures:
 - Electee activities: Const. Art. III, Sec. 2(b)
 - Financial inability: Const. Art. III, Sec. 7
 - Inactive members: Const. Art. VII, Sec. 2(c)
 - Initiation of ineligible candidates: Const. Art. IV, Sec. 6
 - Removing a chapter officer for cause: Const. Art. VII, Sec. 9(a)

3. *Choosing 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 who are TBP members or will be initiated in the near future for suggested candidates.

A chapter may have more than four Advisors, with one designated as Chief Advisor. Four should be selected to serve on the Advisory Board, while the others may be designated as *honorary* Advisors. This assures 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 someone who will enjoy serving and remember this important qualification: *time*. Does that potential Advisor have time to put his/her experience and willingness to work for the chapter?

4. *Using Your Advisors' Services*

See [here](https://www.tbp.org/other/advRole.cfm)²⁹ for a description of various roles your Advisors may have.

²⁹ <https://www.tbp.org/other/advRole.cfm>

5. *Advisor's Book*

A digital version of *The Advisor's Book*, which is available [online](#)³⁰ and last updated in 2010, explains the basic scheme of chapter operations and the Advisors' principal functions within the scheme. It refers to the *President's Book* (now this *Officer Handbook*) 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 and to newly installed Advisors is encouraged.

C. **Suggestions for the Treasurer**

Official Chapter Bookkeeping System Instructions are available from HQ. *If your Treasurer does not have a copy of the official bookkeeping instructions, request one from HQ, even if your chapter does not or cannot use the official system.* The information is general and will make your Treasurer's job easier.

1. *National Charges & Chapter Billing Information*

- a. The total fee you have paid to your chapter includes \$55.00 for the following [breakdown](#)³¹ as of 2021:

\$16.00	Expenses of the Association
\$12.00	Four-year subscription to <i>The Bent</i>
\$10.00	Convention Assessment
\$10.00	Engraved Membership Key
\$4.00	Official Membership Certificate
\$2.00	Copy of Constitution, Information Book, etc.
\$1.00	Official Membership Card

- b. Convention expenses are met by a charge to each new initiate of each chapter which are 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, with a deadline of two weeks after initiation.
- c. Your chapter will be [charged](#)³² for the key, certificate, and card for each electee who is **NOT** initiated. If the person is initiated later, a key charge will be credited to your chapter's account. Keys that will never be used can be sent to HQ for a credit, but certificates are dated and worthless; destroy them. Our vendors have a 30-day replacement policy for damaged or undelivered keys and certificates; notify HQ if you have not received these items within 30 days of submitting your [Report of Final](#)

³⁰ <https://www.tbp.org/other/advisorsBook.cfm>

³¹ <https://www.tbp.org/off/initiationFee.cfm>

³² <https://www.tbp.org/off/eNotes/dec20eNotes.cfm#Keys>

Action³³. **If you do not distribute keys and certificates to initiates, your chapter will be responsible for the charges to issue them separately from HQ to order replacements.** Because they are ordered separately, there is a cost for replacements for a key and certificate. If you fail to provide change of address for key and certificate shipping, you will also be charged for re-shipment charges. **Please note:** If all catalog cards are not filled out at the same time, those that are completed later will be sent separately to our key and certificate vendor. The chapter will also incur additional shipping charges.

- d. All chapter statements on balances are available online within the electronic reporting system at www.tbp.org/tbpeilig and are emailed to the chapter President, Treasurer, and Chief Advisor monthly. Payments can be made by mailing a check to HQ or calling with credit card information.
- e. The Association has a dedicated email address (accounting@tbp.org) for chapter billing, payments, and statement or accounting questions.

2. *Fees and Dues—see Const. Art. III, Sec. 6*

- a. The average initiation fee is about \$85, including the national and chapter initiation fee.
- b. Chapters usually charge a fee in addition to the national fee sufficient to cover operating expenses. At the first or second meeting in the fall, the budget for the year (see 3a. below) should be fully considered to cover all probable chapter expenses for which special assessments are not made. These include Convention assessment, chapter events, and other chapter needs or activities for the year.
- c. Financial Refusal of Membership—See Const. Art. III, Sec. 7 regarding electees who are unable to pay the initiation fee.

3. *Record Keeping*

- a. The chapter officers—sitting as a committee with the Treasurer as chair—should prepare and submit to the chapter a budget for the upcoming year of the probable receipts and expenses. As a suggestion, 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.
- b. Handling of small sums of money is best done using a cash fund. Keep \$100 in the fund and pay expenses of \$20 or less from the fund. Pay by check for larger amounts.
- c. Itemized reports should be presented to the Treasurer with every request for money, and keep copies of those reports.
- d. No expenditures should be made without approval of the President.

³³ <https://www.tbp.org/off/membershipSubmit.cfm#FinalAction>

- e. 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. In addition, accurate records are helpful in case of university or IRS audit!

4. *General Suggestions*

- a. Each chapter should try to establish a surplus for future use. Authorization to use this surplus, for additional expenditures, should be approved by the chapter so they can deem the extra expense as beneficial. Such action is subject to the approval of the Advisory Board.
- b. Chapter funds should be deposited in a bank or savings institution which carries deposit insurance or through the University's Account Payable department. Any chapter debts caused by over-expenditure or mismanagement should be discussed by the Advisory Board. With the Advisory Board's approval the situation can 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 to liquidate the indebtedness.
- c. A chapter should never be in arrears with the Association for more than the charges for the last group of initiates. Large unpaid chapter balances at Headquarters are subject to penalty including fines.
- d. If outstanding balances are not paid, it could result in chapter orders for graduation regalia being delayed or denied. For balances of \$500 or greater, the chapter must go before the Financial Affairs Committee at Convention and, potentially, the whole Convention floor.

5. *Annual Income Tax Returns*

- a. The 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.
- b. 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.
- c. Since 2008, the IRS requires all chapters to file an e-postcard form 990-N online at [irs.gov](https://www.irs.gov). A chapter whose income for the fiscal year does not exceed \$50,000 is required to file an annual IRS Form 990-N. If your chapter's income normally exceeds \$50,000, obtain a copy of the full-length Form 990-EZ at [irs.gov](https://www.irs.gov) and mail it directly to the IRS shortly after the close of your fiscal year. Keep copies of anything you send to the IRS.

- d. Even if your chapter's income is greater than \$50,000 for the current year, you may not need to file if this income amount is unusually high. Refer to the form's [FAQ³⁴](#), which defines the criteria of having gross receipts not normally more than \$50,000.

D. Suggestions for the Corresponding Secretary

The job of Corresponding Secretary ranks second in importance only to that of President. The Corresponding Secretary is responsible for preparing and submitting all chapter reports to HQ quickly and accurately. Each chapter President is given a username and password to access the online report system which the Corresponding Secretary should use to submit reports online. If the Corresponding Secretary does not carry out this responsibility, keys and certificates may be delivered late. *Fines are required to be levied by the Executive Director for failure to submit Eligibility, Election, and Final Action Reports promptly.* The Executive Director maintains membership records for TBPI worldwide and ensures that new members receive keys, certificates, and copies of *The Bent*. *Please see that this job, above all others, is performed promptly and accurately.* The various reports are as follows:

1. Officer Fall Information Report

It is a requirement to submit this report within five weeks after school starts each year. The Officer Fall Information Report includes lists of the names, addresses, phone numbers, and email addresses of the officers and recently elected advisors of the chapter to update. The report also requests information on the school's dean and president and dates related to the school's academic term. After submitting the report, the chapter must report any changes in the information which may occur during the year to HQ by email. A list of Advisors for each chapters are available [here³⁵](#).

2. Report of Eligibility

Eligibility, Election, and Final Action reports for undergraduate students must be submitted online at www.tbp.org/tbpelig. Submit the Eligibility Report to HQ, preferably within five weeks after the start of the term. Sets of Constitution and Bylaws and Information Books are sent to the chapter after the Report of Eligibility has been received. Headquarters 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. Chapters sometimes elect a graduate-student, alumnus, or eminent engineer and then find that the individual is already a member, or worse, unqualified under Const. Art. II. To prevent this, wait for the technical judgment of candidate eligibility.

³⁴ <https://www.irs.gov/charities-non-profits/annual-electronic-notice-form-990-n-frequently-asked-questions-and-answers>

³⁵ <https://www.tbp.org/off/chapterList.cfm>

3. *Report of Election and Catalog Cards*

The report and cards must be submitted to HQ four weeks before initiation to ensure timely delivery. Keys and certificates are delivered by the vendor to the chapter contact; the President's signature and either the Corresponding Secretary's or Recording Secretary's signature must be added. If keys and certificates will be received after graduation, during school break, or in the summer, the shipments should be addressed to your Chief Advisor, or to whom the chapter designates.

Approval (by email) of the Executive Director for you to hold your initiation follows receipt of your Report of Election. **The cardinal mistake in TBII is to hold an initiation without first receiving approval from Headquarters.**

Receipt of a technical judgment of eligibility of graduate-student, alumnus, and eminent-engineer candidates after submission of the respective Report of Eligibility does not constitute approval for their initiation; it merely states that records and the information submitted to HQ 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.

4. *Report of Final Action and copy of Roll Book Signatures*

This report completes the sequence for an initiation season and is the most vital report. Its purposes are: document which candidates actually were initiated, provide information on reasons for refusal of membership by electees, and indicate the proposed dates of a substitute initiation for any electees who were unable to attend your initiation. The Report of Final Action is the last report in the membership trio (including Eligibility and Election Reports) and provides complete information on *all* candidates. *No one is a member of TBII until the candidate's initiation is properly reported to the Executive Director.* The Roll Book signatures must be scanned, emailed, and submitted as a part of the Final Action Report. The Corresponding Secretary is responsible for submitting the Roll Book signatures to HQ unless otherwise specified by the chapter.

5. *Convention Credentials*

Voting delegate's Credentials are available for completion in the online system. Elect your delegate (usually the incoming President) and alternate (usually the incoming Vice President) and submit online prior to the deadline. Any chapter member, officer, or advisor can register as the voting delegate.

6. *Constitution Ratification Ballot*

Following any amendments approved by the Convention, each collegiate and alumni chapter is required to vote (by $\frac{3}{4}$ vote) on the Ratification Ballot with a quorum present and submit the ballot by April 1 of the year following the Convention.

7. *Report of Officer Elections*

Within two weeks of officer/Advisor elections, the Report of Officer Elections must be signed and submitted to HQ through the reporting system. These signatures will be used for verification of future reports.

8. [Chapter Survey](#)

At the end of the school year, this report is submitted to give HQ an update on the overall progress of the chapter.

9. [Project Reports](#)

At the end of the school year, this report is submitted to provide a summary of the projects conducted that academic school year. This shows HQ the diversity of projects run, displaying TBII's values, along with how involved the members are in campus activities and community involvement. It is highly recommended to work on this report as the school year progresses so that there will be less of a burden at the end of the school year. Additionally, get other officers involved so they can provide input, especially since this report is graded for chapter awards during Convention.

10. *Chapter Bylaws, News, and Advisory Board Actions*

Report these matters when the occasion arises. Use the appropriate Headquarters contacts available on the website to submit relevant items.

11. *Bylaw III*

Observe this Bylaw carefully in order to avoid fines charged to your chapter's HQ account.

II. Election of Officers

Officers should be elected as early in the calendar year as possible. Select members who have the *ability, will, and time* to serve. Choosing the chapter's most outstanding person as president may not be good policy if that member is overloaded with extracurricular activities. The success or failure of the chapter depends primarily upon the officers.

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 Executive Director recommends that chapters have only one group of officers each year.*

Document and submit the Report of Election of Officers in the online system. The Officer Election Report is a graded report.

The old officers should remain in office until the new officers are familiar with their duties. *Use a [chapter officer installation procedure](#)*³⁶! It is a part of your job to help your successor start well. When you transfer your records, take time to provide advice, information, and support that will be essential in achieving a successful chapter.

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

1. Because of experience and continuity, the Advisor Treasurer can prepare the budget more easily, follow up with members who still owe money to the chapter, and make suggestions to the chapter and Advisory Board based on experience.
2. The Advisor Treasurer has an office where members may pay dues and where the chapter may keep its materials if there is not a dedicated chapter office.
3. Banking will be easier, and new signature cards will not be required every year. If the chapter conducts their finances through the University's Account Payable department, an Advisor Treasurer would already be familiar with the process.

Chapters with an Advisor Treasurer 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 overall supervision of financial matters to the Advisor 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, and 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. Meetings

It is recommended to send meeting reminders in order to have good attendance. Appoint the Recording or Corresponding Secretary or another reliable member to assist. Meetings provide a great forum for Tau Beta Pi members to meet and form working relationships with faculty, alumni, and other students.

Conflict in meeting times with other campus organizations is often a serious problem, particularly when a 3/4 quorum is required. Your chapter should consider serving as coordinator of meeting schedules for all engineering groups, since its membership covers all departments. Alternatively, you might hold shorter chapter meetings during the day.

Before all meetings, prepare an agenda to save time and expedite all business, plans, and projects. If possible, send out the agenda ahead of time to inform what the meeting will cover.

³⁶ Chapter Toolkit: Guide to Officer Transitions

The President should have an understanding of how all aspects of chapter operations are going.

Some discussions should take place outside of the general meeting. Members are often more inclined to provide their thoughts when placed in a small group or a committee. If a member is bothered about something, a direct talk is the best approach. 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 in doubt, confer with your Advisors.

In order to reinforce the motto in the minds of members, it's recommended to occasionally review its symbolization and translation at chapter meetings. However, make sure to discuss the motto at meetings when only members are present to preserve its secrecy.

Finally, it is 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 is in [Appendix 2.1](#). You should also be familiar with the quorum requirements for various types of meetings listed in Const. Art. VII, Sec. 6.

IV. Committees

The chapter President should appoint junior students as committee chairs or co-chairs to identify leaders in the chapter and help smooth future officer transitions. Some will become chapter officers, which helps to preserve continuity. The President should prepare a specific, written list of responsibilities for each chair.

Keep in contact with your committee chairs to ensure they function properly. Ask the chairs to report to the chapter President periodically. Specific suggestions for various committees are as follows:

- A. **Publicity Committee**—most chapters no longer have publicity committees; however, it is important to recognize new initiates or extraordinary members. This information can be sent to HQ for possible inclusion in *The Bulletin* or *The Bent* or published on social media. If your institution has a publicity committee, its main duty is to see that chapter activities and events are publicized in both collegiate and public press.
- B. **Nominating Committee**—for election of officers, as discussed in section II.
- C. **Event Planning Committee**—when planning larger scale events for members or campus-wide attendance (e.g. Engineers Week), it can be beneficial to designate a committee to coordinate with the appropriate administrators, offices, etc.
- D. **Initiation Planning Committee**—as initiation is one of the most important events each semester, the chapter should have a dedicated group of members to help with setting up, participating in, and cleaning up after the ceremony and reception if applicable.

V. Additional Operations

A. Hosting Convention

The annual Convention is normally held each October. A measure of importance to the Association is the Convention cost which includes travel, lodging, meal, and onsite expenses of voting delegates, Association officials, alternate delegates, advisors, and guests. Tau Beta Pi only covers the expenses of voting delegates, Association Officials, and a select number of others. The total cost of Convention is usually \$500,000-600,000.

Decisions regarding future sites are made by the Convention itself. The host chapter must expend time and energy on the work of planning the Convention, but it need not spend its own money.

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 TBPI, a host chapter advances the interests of its institution and community in a major way. Convention brings over 500 people, most of them outstanding engineering students from the collegiate chapters. This is a valuable public-relations opportunity for the institution. All of the host chapter's members have the unique chance of attending a Convention.

Responsibilities of the Host Chapter. The host chapter must have the support and cooperation of its Advisory Board, dean of engineering, and the 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 valuable advice and assistance.

A Convention site must have lodging, meeting, dining facilities, and transportation arranged for some 500 Tau Bates. 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. Lodging must be available for all guests; typically, about 270 double-occupancy rooms are required.

Assistance from Headquarters. A Convention handbook, which is being updated at the time of writing this document, is given to chapters whose invitations have been accepted. It contains detailed answers to many questions and 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 HQ. At TBPI expense, this member is expected to attend the Convention immediately preceding the one the host chapter will host to observe details of the annual meeting. The Executive Director or a member of the HQ staff visits the host chapter in the spring prior to the Convention to review facilities and logistical details.

Submitting an Invitation. Chapter invitations for the annual Convention should be sent by June 1 to the Executive Director who will refer them to the next Convention Site Committee. Invitations should be in the form of a letter and should be endorsed by the chapter's Advisory

Board and school administrators. 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 Convention Site Committee interviews representatives of each inviting chapter and makes its recommendation to the entire Convention. The Convention then votes to select a site. TBPI is deeply grateful to all chapters that submit invitations.

If you would like to submit a bid to host the convention, please follow this [document](#)³⁷.

B. TBPI Awards and Programs

Please consider nominating Tau Bates for an award and encouraging your members to apply for TBPI [scholarships and fellowships](#)³⁸. For a complete list of current TBPI awards and their descriptions, visit [here](#)³⁹. You are also encouraged to recognize students and faculty at the chapter level for outstanding accomplishments. Blank award certificates are available [in the TBP store](#).

C. Image Materials and Chapter Supplies

Headquarters has an impressive selection of image materials and chapter supplies to help you promote your chapter and the Association. Many of these items are free and can be ordered [in the TBP store](#).

D. Proper Use of Insignia

One should abide by these [guidelines](#)⁴⁰ for using TBPI logo, The Bent, and other insignia replica.

E. Association Jargon

The Association is an honor society, not a fraternity. An honor society's purpose is to encourage and recognize excellence in scholarship and/or leadership in education.

Your local unit of the national organization is properly called a chapter, *not* a club.

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.

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 Const.

³⁷ <https://www.tbp.org/off/eNotes/ConvSiteBids.pdf>

³⁸ Chapter Toolkit: Guide to Scholarships and Fellowships

³⁹ <https://www.tbp.org/memb/awards.cfm>.

⁴⁰ <http://www.tbp.org/off/graphics.cfm>

Art. VII and Art. VIII). There are several eligibility routes to membership (See Article II), but once initiated, all are just members—*there is but one class of membership*.

TBP is the world's largest engineering society, and all members are considered *life members*. The over 80,000 members who have purchased life subscriptions to *The Bent* are referred to as *life subscribers*. Leaders of committees are properly called *chairs*.

F. Mail and Shipping

All correspondence from HQ will be distributed by email or is available online. Chapter supplies and insignia orders are shipped by UPS to the address your chapter has provided with the exception of Puerto Rico Alpha and Alaska Alpha which use Priority Mail.

All reports & correspondence to Headquarters should be completed online or submitted via email to chapters@tbp.org.

Appendix 1. Sample Documents and Procedures

Appendix 1.1. Procedures for Character Evaluation

Several sample procedures for character evaluation are found below, each including the application, a summary, procedure, and assessment. If your chapter does not have a set procedure for character evaluation, or if you would like to switch to a different one, reviewing these sample procedures can be helpful.

1. **Traditional Procedure**

Application: Small chapters (< 30 Members)

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

Procedure:

- 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.
- 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.
- Investigations are conducted 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:

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

2. **Mixer Meeting Procedure**

Application: Medium and large chapters

Summary: The scholastically eligible candidates are invited to a mixer, 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:

- Invitation letters are sent out to each scholastically eligible candidate. The letter congratulates the candidate on his/her academic performance, invites the candidate to the get-acquainted meeting, and gives a general overview of the purpose and activities of TBII. A good idea is to enclose the introductory brochure for additional information.
- Hold a get-acquainted meeting. At the meeting, give out information about TBII both on a national and local level. Following the formal part of the meeting, 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.
- Evaluate candidates. The members are asked to evaluate either in written form or by group discussion the candidates they met at the meeting.

Assessment:

- This procedure is rarely used alone. It is frequently combined with the resume and interview procedures.
- 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.
- Scheduling the meeting at a time when everyone can attend is difficult or impossible, especially in large chapters.
- Small chapters have also found this to be a useful part of their evaluation process.

3. Interview Procedure

Application: Small, 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:

- 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.
- 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 (an open Google Sheet makes scheduling easier). 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 resumes or biographical data sheets and return them to the interview committee, at which time candidates will sign up for interviews.

- 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 resumes 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.
- 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:

- This procedure is generally not used alone. It is frequently combined with the resume and/or mixer meeting procedure. Sometimes the interview committee is set up according to academic department, which is similar to the departmental caucus procedure.
- 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. Having a few different options for the committee and candidates helps alleviate scheduling stress.
- The interviews should be somewhat informal, and extreme care must be taken to avoid placing the candidates in the role of supplicant.
- 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:

- 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.

- 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.
- 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:

- 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.
- Departmental caucus is an excellent way to organize a candidate interview procedure.
- 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.
- The caucus format provides an excellent opportunity for faculty-alumnus member input.

5. Resume Procedure

Application: Any size chapter

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

Procedure:

- Letters are sent out to each scholastically eligible candidate. The letter congratulates the candidate on his/her academic performance, invites the candidate to complete a resume 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.
- The membership committee will review all of the resumes and formulate a recommendation on each of the candidates based on this information.
- 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:

- This procedure is very easily incorporated as a part of any of the other procedures, or it can work well independently.
- The resume form, if thoughtfully planned, can be an excellent source of information about the candidate.
- In place of or in addition to a resume, some chapters require the candidates to write an essay on some pertinent topic in furtherance of TBII's liberal culture objective. Other

essay topics could be a) why the candidate wishes to join TBII, b) what future activities/ideas the candidate has for the chapter or c) what TBII means to the candidate.

- The resume (and essay, if included) can be used to weed out candidates whose interest is minimal.

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, ranging from service on a committee or polishing a Bent to completing an electee exam.

Procedure:

- 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. Assignments can also be made using online google forms.
- Monitor candidates' project activity. This can 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.
- 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:

- This method of character evaluation is rarely used by itself, but is frequently used in conjunction with any of the other procedures.
- 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.
- There is generally more cooperation on the part of candidates if the activities are meaningful and if they have a choice of projects.
- This procedure provides good personnel for completing chapter projects

Appendix 1.2. Procedures for Election

1. **Traditional Procedure for Election (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.

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.

2. **Group or Bloc-Voting Procedure for Election (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.

Appendix 1.3. Procedures for Initiation

1. Initiating at Electee's Home Chapter

Here is the TBII 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.

- a. Establish candidate's eligibility in accordance with TBII membership rules and secure approval for election from HQ, based on candidate's qualifications under Const. Art. VIII.
- b. Notify candidate by mail of election and include a TBII Introductory Brochure.
 - Do *not* contact any chapter on electee's behalf.
 - Tell electee not to contact any other chapter concerning initiation.
 - Tell electee to wait and hear directly from HQ.
 - Receive acceptance of election from electee.
 - 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.)
- c. Report election either by letter or Report of Election to HQ. Include:
 - Full name of electee,
 - Class year—year of electee's first engineering degree, and
 - Mailing address of electee.
- d. 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.
- e. When electee responds favorably to the first letter, HQ will approve initiation by sending an official Initiation Approval letter to the president of the *initiating* chapter (with a blank initiation report and a signature slip).
 - 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.)
 - Copy of official Initiation Approval will be sent to electee to advise that arrangements are complete.
- f. After initiation, the president of the *initiating* chapter will send to Headquarters:
 - Report of Initiation for your new member, and
 - Signature form.

- g. Headquarters staff will complete all chapter membership records:
- Final letter will be sent to new member.
 - Copy of final letter will be sent to *initiating* chapter.
 - Copy of final letter will be sent to you along with signature form. Cut your new member's signature from form and paste into your chapter roll book.
- h. Headquarters will:
- Charge new member's national initiation fee to *your* chapter account,
 - Order engraved key and membership certificate for new member, and
 - Start the four-year subscription of *The Bent*.

2. Initiating an Electee from a Different Chapter

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

- a. Electee should contact you requesting details of your chapter's next initiation ceremony:
- Date
 - Time of ceremony
 - Place ceremony will be held
 - Initiation banquet details.
 - If details are unknown, make arrangements to inform the electee later to provide date, time, and location.
 - 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.
- b. When you know that the electee plans to be initiated, please contact HQ or instruct the electee to notify Headquarters of the electee's intentions. The staff will send an official Initiation Approval to you along with:
- Blank initiation report
 - Signature slip
 - Note: Do not collect any money from the electee. Said electee 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.
- c. Initiate the electee, who must sign the signature form.
- Send the completed Initiation Report and the signature form to HQ.
 - If the new initiate attended your chapter's banquet, inform HQ of 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.
- d. You will receive a copy of a letter to the person you initiated, thanking you for assisting another chapter.

Appendix 1.4. Sample Documents

1. Postponed and Financial Refusal Electees

(Chapter) (Semester) (Year)

The persons listed below were elected by your chapter during past initiation seasons as noted. They have refused membership for financial reasons (Const. Art. 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

<i>Name & Class</i>	<i>State/Date Elected</i>	<i>Board Approval</i>	<i>RE: Key</i>	<i>by Chapter</i>
S.A. Bosworth, '10	Financial Refusal Fall 2009	N/A	HQ has key	_____
G.R. Jones, '11	Postponed Fall 2010	APPROVED	Chapter has	_____
*M.M. Mitchell, '12	Postponed Fall 2010	N/A	Not ordered	_____
L.M. Noack, '11	Postponed Fall 2010	APPROVED	Chapter has	_____

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.

2. Sample Letter of Congratulation to Parents of Candidates from Dean

Office of the Dean of Engineering
Marvelous University

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

3. Sample of Publicity Committee News Release

NEWS RELEASE

THE TAU BETA PI ASSOCIATION

The Engineering Honor Society

TENNESSEE OMEGA CHAPTER

The University of Tennessee

Knoxville, Tennessee 37996

Contact: John H. Jones, Publicity Chair

Telephone: 546-4578

For Release November 15

Heikes Initiated Into Tau Beta Pi

Eleanor B. Heikes, 112 Bentson 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.

* This sample may be tailored and adapted to suit each new member.

Appendix 2. Background Information

Appendix 2.1. Robert's Rules of Order

For more information, follow this link from a Professional Development session on this topic:
<https://www.tbp.org/conv/Materials/RobertsRulesSlides.pdf>.

The basic rules can be followed using the cheat sheet below found at
https://www5.njit.edu/facultysenate/sites/facultysenate/files/RobertsRulesCheatSheet.pdf&sa=D&ust=1611517201295000&usg=AOvVaw11gqStE5yKBax18yNExl_y

Action	What to say	Can speaker be interrupted?	Need a second?	Can this be debated?	Can this be amended?	Votes needed
Introduce main motion	"I move to..."	No	Yes	Yes	Yes	Majority
Amend a motion	"I move to amend the motion by..."	No	Yes	Yes	Yes	Majority
Move item to committee	"I move that we refer the matter to committee."	No	Yes	Yes	No	Majority
Postpone item	"I move to postpone the matter until..."	No	Yes	Yes	No	Majority
End debate	"I move the previous question."	No	Yes	Yes	No	Majority
Object to procedure	"Point of order."	Yes	No	No	No	Chair's decision
Recess the meeting	"I move that we recess until..."	No	Yes	No	No	Majority
Adjourn the meeting	"I move to adjourn the meeting."	No	Yes	No	No	Majority
Request information	"Point of information."	No	Yes	No	No	No vote
Overrule the chair's ruling	"I move to overrule the chair's ruling."	Yes	Yes	Yes	No	Majority
Extend the allotted time	"I move to extend the time by _____ minutes."	No	Yes	No	Yes	2/3
Enforce the rules or point out incorrect procedure	"Point of order."	Yes	No	No	No	No vote
Table a motion	"I move to table..."	No	Yes	No	No	Majority
Verity voice vote with count	"I call for a division."	No	No	No	No	No vote
Object to considering some undiplomatic matter	"I object to consideration of this matter..."	Yes	No	No	No	2/3
Take up a previously tabled item	"I move to take from the table..."	No	Yes	No	No	Majority
* Reconsider something already disposed of	"I move to reconsider our action to..."	Yes	Yes	Yes	Yes	Majority
Consider something out of it scheduled order	"I move to suspend the rules and consider..."	No	Yes	No	No	2/3
Close the meeting for executive session	"I move to go into executive session."	No	Yes	No	No	Majority

Appendix 2.2. Headquarters' Reports

This section is designed to assist you in preparing your chapters' reports to HQ each academic year. All undergraduate reports shall be submitted electronically online at www.tbp.org/tbpeilig.

The template below provides details for each required report and recommended guidelines to complete each of them in a timely manner. Differentiation is made between a 'hard' deadline (the actual due date) and a 'soft' deadline (the recommended due date which is approximately two weeks in advance). All reports are hyperlinked in the appropriate appendices.

Report	'Soft' deadline	'Hard' deadline	Responsible Party
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FALL AND SPRING INITIATION CYCLES (ELIGIBILITY → ELECTION → FINAL ACTION)			
<u>Report of Eligibility</u> Report the # of undergraduate students eligible.	As soon as Registrar has requisite info	First 5 weeks of semester	Corresponding Secretary
<u>Report of Election & Electronic Cards</u> Elect new members based on character.	1 month before initiation	2 weeks before initiation	Corresponding Secretary
<u>Electronic Cards</u> To be emailed to initiates for completion.	1 month before initiation	With the Election Report	Candidates / Electees
<u>Report of Final Action</u> Report who was initiated. Send fees (fraction of initiation dues) and scanned copy of roll book signatures to HQ.	1 day after initiation	2 weeks after initiation	Corresponding Secretary, Treasurer

FALL SEMESTER			
<u>Fall Contact Information Update</u> Update contact information for the new officers. Update UPS shipping address.	2 weeks after school starts	5 weeks after school starts	Corresponding Secretary
<u>Convention Attendance</u> Finalize travel plans to Convention.	8/18	9/1	President/Attendee
<u>Convention Delegate Expense Report</u> Submit receipts for reimbursement from Convention.	1 day after returning from Convention	2 weeks after Convention	Delegate

<i>SPRING SEMESTER</i>			
<u>Report of Officer and Advisor Election</u> Elect new officers.	1 day after electing new officers	2 weeks after electing new officers	Entire Executive Board
<u>Constitution Ratification Ballot</u> Vote on constitutional matters discussed at Convention of previous calendar year. Quorum (3/4 of active members) required.	3/18	4/1	Corresponding Secretary
<u>Financial Report</u> Report financial status to HQ	5/18	6/1	Treasurer
<u>Chapter Survey</u> How “healthy” is your chapter? Is membership up? down?	5/18	6/1	Corresponding Secretary

<i>SUMMER SEMESTER</i>			
<u>Convention Credentials</u> Submit Convention credentials.	5/18	6/1	Corresponding Secretary

<i>MISCELLANEOUS</i>			
<u>Officer Signatures Report</u> Provide legal signatures for all upcoming TBII documentation.	1 day after electing current officers	2 weeks after electing current officers	Corresponding Secretary
<u>IRS Form 990-N</u> Maintain tax-exempt status of chapter.	1. day of 5. month following end of chapter’s fiscal year	15. day of 5. month following end of chapter’s fiscal year	Treasurer
<u>Project Reports</u> Submit documents detailing projects completed throughout academic year.	5/18	6/1	Corresponding Secretary

The [calendars at this link](#)⁴¹ provide the suggested timeline for chapters to adhere to during fall and spring semesters respectively.

⁴¹ Chapter Toolkit: TBP Chapter Calendars – Suggested Timeline

Appendix 2.3. Facts for Electees

Additional facts of TBII can be found [here](#)⁴².

Eligibility

- 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 and graduate active student membership. No faculty input is required.

Initiation

The initiation ceremony requires a solemn promise to uphold honor/ethics & to support TBII. 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 we require our members to read the Association's Constitution and Bylaws, Code of Ethics, and Eligibility prior to being initiated.

According to the Merriam Webster Dictionary, a creed is "a set of fundamental beliefs; a guiding principle." Solemn means "marked by the observance of established form or ceremony." Finally, to promise is "to pledge to do, bring about, or provide." As indicated by these definitions, TBII is using these words in a context which correlates with the history of the organization.

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 TBII 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.

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.

⁴² <https://www.tbp.org/about/generalFacts.cfm>

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
3. Solemn—marked by the observance of established form or ceremony
4. Promise—to pledge to do, bring about, or provide