Theta Tau

Professional Engineering Fraternity

Chapter Officers' Manual

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1. Preface

The most important unit of any fraternity is the individual chapter. Accordingly, chapter officers have a special responsibility to maintain and improve the standards of the Fraternity. They are responsible for seeing that its laws and customs are observed in detail, and for establishing and maintaining the appropriate atmosphere within the chapter to fulfill the purpose of the Fraternity and to provide the maximum opportunity for each member's well-balanced personal development — professionally, socially, and academically. Further, the officers share a responsibility to involve both student and alumnus members in fraternity affairs so that membership will be meaningful to members of all ages. This Manual is designed to assist the officers in discharging these responsibilities.

Each officer should refer to this Manual when considering running for office, or at least upon election. Upon retiring from office, be sure that one's successor in office is aware of this reference manual. In addition, each officer should compile a notebook containing facts and opinions accumulated during one's tenure to help guide this successor. Such a notebook can be of inestimable value to the newly elected officer, especially when a predecessor is not be available to give personal guidance.

Each officer should become completely familiar with their responsibilities (as outlined in Theta Tau Laws and Policy Manuals, and Robert's Rules of Order), and have a general knowledge of:

- duties of the other officers
- Theta Tau's balanced program of service, professional development, and brotherhood
- chapter functions, activities, and events
- Fraternity laws and customs
- Risk Management policies

The Calendar of Chapter Officer Duties should be observed so that responsibilities may be discharged on time. Regular communication with your Regional Director(s), Central Office, and via the Velocitas electronic newsletter provide a means to remind one of upcoming duties.

Fine chapter operation involves the proper handling of external as well as internal responsibilities. The chapter is obligated to observe the rules of the school where it is located and to contribute positively to the program of the institution. It also has an obligation to reflect favorably upon the Fraternity of which it is a part, carefully to follow its laws, and effectively to fulfill its purpose. **If there is ever any doubt as to the school's adherence to its own policies or concern about the manner of conduct or behavior by a school official,** contact your Adviser, Regional Director, Central Office, or local police department immediately.

2. Officers

Each member, upon initiation, pledged to conduct faithfully the duties of any office. With this honor comes the commensurate responsibility for discharging the duties of the office to the best of one's ability and for setting an example for others to follow. Every office is important, and election or appointment should never be taken lightly or without resolve to execute the duties involved. It is better to decline an office , than to accept a position and then fail to fulfill the duties associated with it. A candidate's success in organizing a specific activity or event may be used as a measure of preparedness for appointed office; and success in fulfilling the duties of that appointed office then used as a measure for election to higher office. While this may tend to mean that more experienced members will serve in the highest offices, mere longevity or age should not be considered a major or sole factor in electing an officer.

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A principal reward of responsible leadership comes in the knowledge of tasks well done in maintaining successful chapter operation and in advancing the cause of the Fraternity. In contacts with other chapters and with national officers, a spirit of cooperation should prevail with the full realization that **Theta Tau is a NATIONAL PROFESSIONAL ENGINEERING FRATERNITY.**

2.1 Regent

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"No member should be elected as Regent until he has been a member for at least one term. If possible, he should have acted in another official capacity prior to his election as Regent." — Bylaws, Chapter IV, Part B, Section 11.

With election to the office of Regent goes high honor, but also responsibility to lead in an effective way. The effort and ability the Regent brings to the office will determine in large measure the success achieved during his tenure in office. The specific procedural duties of a Regent are extensive, but of even greater importance are the intangible duties as chapter leader. In view of the importance of the individual chapter in our Fraternity, the Regent plays a very significant role in the development of the the chapter.

2.1.1. Duties

Theta Tau Bylaws require that the Regent preside at all meetings, initiate new members, appoint committees, witness the records of all initiates, and fulfill such other obligations as may be imposed by the chapter. The Regent is specifically responsible for the Charter, Ritual, Constitution, and Chapter Roll Book. The Regent (perhaps with approval of other elected officers or the chapter as a whole appoints non-elective officers) and shall cause at least one article of the Constitution and Bylaws to be read at each regular meeting. With the Treasurer, the Regent is jointly responsible for all financial reports and transmission of fees and dues; with the Scribe, for all general reports.

The Regent should supervise and coordinate with other officers and chairs in maintaining contemporaneous and up-to-date version of the chapter's Annual Report. This report is to be on a quarterly basis (10/15; 1/1; 3/15, and 5/1) with your Regional Director and on an annual basis with the Executive Director (by May 1). It has been shown to be essential for the long term success of our chapters that this report be maintained in a contemporaneous manner. The full and timely completion of this report provides each chapter an instantaneous view of its current successes, the level of participation and involvement by each of its members, and an historical record for the chapter to reference.

In addition to these specifically stated duties, the Regent's obligations are far more extensive, including overall responsibility for every aspect of chapter activity. The Regent should never forget that authority may be delegated, but responsibility cannot. The Regent bears the burden of the general responsibilities of officers noted in the Preface of this Manual, so must be familiar with the laws and customs of Theta Tau, and with its procedures, and see that the other officers discharge their duties, also. Only under extenuating circumstances, however, should the Regent undertake personally to discharge duties assigned to others. The chapter and its individual members benefit most when there is a proper distribution of the work among the large body of members that make up the chapter. The more people involved in carrying the workload of the chapter, the less there is for each one to carry.

2.1.2. Chapter Meetings

Chapter meetings should be held regularly at an established time and place, following a schedule planned at least a term in advance. The level of chapter activity and the extent of business to be handled will determine the frequency and length of meetings and the possible necessity of special meetings in addition to those regularly scheduled. Regular meetings should be held at least twice each month during the school year. Shorter meetings with the agenda outlined in advance, are preferable to longer meetings held less often. To be effective as presiding officer, the Regent must be familiar with parliamentary

procedure, should exercise fairness, and should refrain from participating in discussion during a meeting unless relinquishing the chair temporarily. The brief manual "Simplified Parliamentary Procedure" is available from the Central Office. If there is one more qualified in this area, the Regent might appoint him as parliamentarian to advise on complicated points during the meeting; but the presiding officer must actually make the ruling on any question of parliamentary law. The Membership Manual includes a standard or common order of business to be followed during the meeting. . Each chapter should have a copy of Parliamentary Procedure at a Glance. Some common parliamentary rules are shown here for your convenience. Minutes from the previous meeting should be distributed in advance to members, preferably along with the agenda for the upcoming meeting. Electronic distribution or posting of minutes and agenda are common.

Only members should be present at regular chapter meetings, and at such times the formal opening (which includes calling of the roll) and closing ceremonies should be used. Whenever there is a visitor who claims to be a member, the procedure outlined in the Ritual for confirming their membership should be followed. Open meetings can be held to invite the participation of pledges or other non-members in fraternity business. This practice is especially beneficial at some point in the education process to teach pledges about the parliamentary and business aspects of the chapter's operation.

The Regent should establish a schedule whereby approximately equal segments of the Constitution and Bylaws will be read aloud and noted in the minutes during each chapter meeting. During the year these entire documents should be read to the chapter. Ideally, the Regent should assign the members in rotation to read from the laws.

2.1.3. Initiation Ceremony

The Regent is charged with initiating all pledges and must see that the Ritual is well rehearsed in detail by all participating officers together, and presented in a meaningful, dignified manner. Be sure that all of the ritualistic equipment and materials are on hand for the initiation. Scheduling and choosing a location for an initiation ceremony should be done carefully to maximize its effectiveness.

The ceremony of initiation is the most detailed presentation to the initiate of the ideals, principles, and secrets of the Fraternity. It is also a review of these for the members present. Therefore, to inspire and to educate, the presentation should be planned and executed with care. Room arrangement and lighting should be utilized to best advantage. The front of the room which the initiates face during the ceremony should especially be free of debris, book bags, extra or unnecessary furniture, etc. The presentation of the Ritual should be a tribute to the initiate and a credit to the officers and the Fraternity. Immediately after the initiation ceremony, see that the roll page of each new initiate is signed by the Regent, Scribe, Adviser (if present), and any visiting present or past national officer.

Promptly after the ceremony, the Regent should hold a closed conference with the new member(s) during which the secrets of the Fraternity are reviewed. At this time, burn or otherwise destroy all cards, notes, or post-its containing Ritual material. At the meeting following the initiation, the Regent should ask each initiate questions on the Fraternity's secrets which every member is expected to know.

2.1.4. Elections and Appointments

Before the election of student or honorary members, the Regent should carefully determine that each is eligible for membership according to Theta Tau and university rules. Similarly, each officer and Convention Delegate and Alternate must be eligible under Theta Tau laws.

Before pledging, and again before initiation, each prospective member must receive the required secret vote of the student chapter. This must be handled so that no one knows how anyone else voted, and so that only the presiding officer knows the count in detail. Announce only whether the candidate was

approved (required favorable vote) or not approved (any other vote) for pledging or membership. In addition, in the case of candidates for honorary membership, the vote of alumni must be obtained, as required under our laws.

Election of Chapter Officers and of Delegates and Alternates should be by secret ballot (Constitution, Article VIII, Section 1) and in the latter case, in accord with the procedure outlined in Bylaws, Chapter III, Section 14. The Chapter should specify the times for electing Regent, Vice Regent, and Scribe. The Treasurer and Corresponding Secretary are elected at the middle of the college year and hold office for one calendar year (Constitution, Article VIII, Section 2).

The Chapter should specify certain appointed officers or standing committees and provide further for the appointment, when required, of special committees. Since much of the chapter's daily work must be carried on by committees, the Regent should carefully consider each member's capabilities in making appointments to committees, to such positions as Recruitment Chair, Pledge Instructor, Professional Development Chair, Service Chair, and to ritualistic offices (Marshal and Guards). The Regent should in a timely and prompt manner replace any appointee whose work proves inadequate if this becomes necessary. Before doing so, confer privately with the member to try to resolve the problem. A list of all current officers, committee chairs, other members, and pledges should be available to each student member. Each pledge should be provided this information along with their individual copy of the Membership Manual.

As chapter leader, the Regent's primary responsibility is to the Fraternity even if the effect may be detrimental to personal popularity with other members. Accordingly, pay particular attention to the Risk Management Policies that have been developed over the last two decades. These policies (in such areas as Pledging/Member Education, Property Management, Transportation, Website & Social Media, Alcohol, Signature/Contractual Authority, etc) are designed to reduce danger, injury, risk, and liability for your chapter, officers, individual members, and guests.

2.1.5. Chapter Properties

The Regent is responsible for all chapter records and property, and especially so for the Chapter Roll Book, Charter, Ritual, and Constitution.

The Roll Book should be kept up to date with appropriate notations on pages for transfers, expulsions, deaths, etc. All completed pages should be kept in one, or not more than two, binders (available from the Central Office). The Roll Book(s) should be displayed during the initiation ceremony with the new pages in place when they are signed. At all other times, the Roll Book(s) should be carefully protected from fire or other loss as it is obviously irreplaceable.

The Charter should be properly framed and displayed in the chapter room, office, or other appropriate place.

The Ritual is loaned to the chapter from the national Fraternity, and is for the use of members only. Requests from a nonmember to read or obtain a copy of the Ritual should be referred to the Central Office. On the inside front cover of the Constitution are excerpts from Theta Tau Laws which may be copied to satisfy requests from school administrators for such information. The Appendix of the Membership Manual also includes a copy of the Constitution & Bylaws for each member. Each volume should be kept up to date to reflect changes adopted by National Conventions. Neither should be defaced or annotated.

2.1.6. Other Matters

Since the Regent has overall responsibility for proper chapter operation, duties will involve many topics listed in the Calendar of Officer Duties; and in Section 3.0 of this Manual, Chapter Functions; and Section 4.0, Laws and Customs of Theta Tau. Therefore, become familiar with each of these topics. Included importantly, are the chapter's relationships with those outside the Fraternity. When writing letters on Fraternity business, the Regent should observe the standards cited under "Correspondence" in paragraph 3.14 of this Manual. The Regent is responsible for distributing other materials provided by the Central Office as requested.

2.2 Vice Regent

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The Vice Regent's duties are outlined in the Bylaws, Chapter IV, Part B, Section 2. The Vice Regent acts as presiding officer in the absence of the Regent, is in charge of the chapter room and of the examination of all visitors, sees that the officers are at their stations at the opening of meetings and should memorize that short portion of the Ritual in which he participates.

In some chapters, the Vice Regent is charged with general supervision of committee activities as "Chairman of Committees." This seems a desirable responsibility for the member who (at the time of his election) should be the member second best qualified to serve as Regent. In some chapters, the Vice Regent is charged with serving as Recruitment Chairman or Pledge Instructor. However, it is better to have these positions filled by appointment of the Regent since they require special interest and abilities not necessarily associated with general leadership capability and since members in these important positions should be subject to replacement without chapter action. Sometimes, of course, the Regent might select the Vice Regent to serve in one of these positions if he has the interest, ability, and time to handle well the responsibilities of both offices.

The Vice Regent should at all times be prepared to handle the duties of the Regent should he be called upon to take the Regent's place temporarily. Therefore, familiarity with the duties of that office and all chapter activities is essential. The Chapter should provide for the replacement of the Regent should he resign or become unable to discharge his duties for an extended period.

2.3 Scribe

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The Scribe is charged with handling the chapter's official correspondence, maintaining membership records, and filing timely reports with the Central Office. The diligent and timely attention of the Scribe to details contributes much to proper chapter operation.

2.3.1. Duties

The duties of the Scribe are outlined in the Bylaws, Chapter IV, Part B, Section 3. The Scribe keeps the chapter records, including minutes of meetings; register all visitors; witness the records of all pledges and initiates; read all communications to the chapter; promptly respond to communications from the Executive Council; maintain necessary correspondence with the Executive Director, notifying the Central Office of those pledged and depledged, of elections of officers, and of the names, addresses, and other data on new alumni; and shall perform any other duty the Regent may require. With the Regent, the Scribe is jointly responsible for all general reports of the chapter.

2.3.2. Records

The importance of properly kept records cannot be overemphasized. They constitute a documentary history of the chapter, and stand as a permanent record of each Scribe's tenure in office. More

importantly, these data provide the infrastructure upon which the chapter builds. If they are incomplete or inaccurate, they are certain to cause problems in the future. The Scribe should maintain a fully up-to-date copy of the Chapter Bylaws.

During each regular and special chapter meeting, the Scribe should take adequate notes recording each segment of the order of business and each action taken by the chapter. This includes the names of members making and seconding motions, the precise wording of each motion or amendment, and the vote on each motion. This does **not** mean recording the view or opinion of each member on the matter at hand. When prospective members are voted on at a meeting, the minutes should include the vote (favorable or unfavorable) taken on each proposed member by name. The place, date, and time of meeting, and name and position of presiding officer should be recorded. Soon after the meeting, the Scribe should transcribe these minutes into typed form which is then distributed to all members. Brief minutes should be kept of each initiation meeting, listing those initiated.

At the time of pledging, each pledge should complete the Online Pledge Form. The chapter should provide adequate instruction to each one completing the form so that the correct Chapter Name and Chapter Abbreviation is keyed. This form is automatically uploaded to the national fraternity's database system with the status as "prospective member." The Central Office then creates an Invoice for those pledged that is sent to the Treasurer as well as a Pledging Report (listing all those who completed the online form) that is emailed to appropriate chapter officers. Care should be taken to review both to ensure that all have completed the Online Pledge Form since such completion is required under our laws. This Pledging Report should also be retained for later use as it conveniently contains much of the information that will be needed to complete each initiate's Roll page. Be sure payment is made to the Central Office within two weeks of the start of after pledging to avoid doubled pledging fees (Bylaws, Chapter V, Section 8).

A prospective member who has attended another school with a Theta Tau Chapter can be pledged or initiated only in accord with Bylaws, Chapter II, Part E, Section 15, requiring that the chapter consult with the chapter at the student's previous school as to his reputation and general eligibility. To demonstrate that the chapter has complied with this requirement, the Scribe should send to the Central Office with the copies of its communication to the chapter at the other school and the response from the other chapter.

The special procedure to be followed in the case of a candidate proposed for honorary membership is detailed in the Constitution, Article V, Section 6 and 7 and the Policy and Procedure Manual. The Scribe should send the information required, and pertinent sections quoted from the laws, to the following: each alumnus and honorary member of the chapter, the other chapters, alumni associations and members of the Executive Council. Mailing labels to use for this purpose can be obtained from the Central Office

The case of a member wishing to transfer (or affiliate) membership from one chapter to another must be handled as outlined in the Policy and Procedure Manual also requiring communication from the Scribe of each chapter involved.

2.3.3. Initiation Obligations

At the time the written pledge tests (Part A provided by the Central Office and Part B provided by the chapter) are given, the Scribe should begin completion of the Initiation Report showing Initiation Date, Roll Number, Initiate Name, Grade Point Average, test scores, Badge Style, and shipping address; as well as the names, dates, and reasons in the cases of those depledged. The immediate next roll number to be assigned should be obtained from the Chapter Roll Book. This will also provide an opportunity to check on the possible need for additional roll book pages.

Immediately after initiation, this fully completed Initiation Report should be emailed to the Central Office and shared with the chapter Treasurer. The Central Office will generate an invoice based on the Initiation Report submitted. Our laws prohibit the Executive Director from processing any initiate for whom the Central Office does not have completed Pledge Form, payment of Pledge Fee, completed Initiation Report, and payment of Initiation Fee and Badge cost.

Prior to the initiation date, the Scribe should laser, type, or carefully print/letter on each roll page the complete information required (except, of course, signatures), including the candidate's full name below the line on which he will sign. The Pledging Report sent earlier in the semester will contain much of the information needed to complete each initiate's Roll Page. The Scribe should prepare two lists giving, in the order in which they are to be initiated, the candidates' full names for use by the Regent and Marshal during the initiation ceremony. Before leaving the chapter room following the initiation, the one serving as Scribe should sign, on the proper line, each roll book page used.

2.3.4. Other Reports

Most regular reports are contained as spreadsheets in the NCR excel file and may be emailed to the Central Office: Promptly after the election or appointment of any chapter officer, the Scribe should report the election to the Central Office using a Chapter Officer Election Report. Three times each year, the Scribe is to file a Membership Status Change Report listing those receiving degrees, those ceasing to be student members (for any reason), and those resuming student member status. The precise reason must be given for each status change. It is unsatisfactory to simply list members as "inactive" or "alumnus" for instance; specify if each has graduated, has transferred to another school, has withdrawn from school, has been granted Premature Alumnus Status as an undergraduate, has been granted Premature Alumnus Status as a graduate student by the chapter. It is important that the post-school contact information (address, email address, and phone number) of those no longer student members be included so that the chapter and Central Office can continue to maintain contact with the member, and so that he can be sent The Gear. The Co-Op/Study Abroad form may be used to report those who are temporarily away from school for a fixed/defined period of time.

When an alumnus previously indebted discharges his financial obligation, the Scribe must be sure to list him in the appropriate quadrant of the Membership Status Change Report filed with the Central Office.

Special chapter action and prompt report by the Scribe to the Grand Regent or Executive Director is required in the case of an undergraduate, graduate, or co-op student requesting classification as an alumnus prematurely, on a temporary or permanent basis while still a student at the school where initiated. Use the appropriate/applicable type of Premature Alumnus Status form referenced in section 4.1 of this Manual.

The Scribe should collaborate with the Regent on the bulk of the chapter's Annual Report to be contemporaneously maintained and filed on a quarterly basis (10/15; 1/1; 3/15, and 5/1) with your Regional Director and on an annual basis with the Executive Director (by May 1). It has been shown to be essential for the long term success of our chapters that this report be maintained in a contemporaneous manner. The full and timely completion of this report provides each chapter an instantaneous view of its current successes, the level of participation and involvement by each of its members, and an historical record for the chapter to reference.

The Scribe is also responsible for filing Credential Forms required of those who are elected as the Chapter's Delegate and Alternate to the National Convention in accord with the procedures communicated in advance of each Convention.

2.3.5. Letters, Emails, and Communications

When communicating on Fraternity business, observe the standards cited under "Correspondence" in paragraph 3.14 of this Manual and the Social Media Risk Management Policy.

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2.4 Treasurer

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To be successful, a chapter operation must be financially sound. Accordingly, the position of Treasurer is of great importance. Theta Tau Bylaws require that the Chapter Treasurer keep the chapter funds and financial records; order official insignia; collect initiation fees and badge costs from new initiates before initiation, remitting them with the Initiation Report to the national Fraternity promptly after initiation; make Semiannual Dues payment to the national Fraternity; and complete the financial portion of the chapter's Annual Report. Payments for such fees and dues are commonly made collectively via a single check payable to "Theta Tau" and mailed to the Central Office or via the online payment system.

2.4.1. Duties

Before assuming the duties of office, the Treasurer should ask that an audit of the chapter's financial records be made in accord with Bylaws, Chapter VII, Part A, Section 5. The chapter's Advisers are good candidates to conduct such a financial review on a regular/periodic basis.

The Treasurer's duties are outlined in Theta Tau Bylaws, Chapter IV, Part B, Section 4; the Treasurer's authority for demanding timely payments of fees and dues is found in Bylaws, Chapter V, Section 1, and Chapter VI, Section 6; the Treasurer's responsibility for the financial portion of the chapter's Annual Report is found in Bylaws Chapter IV, Part B, Section 7. Although extensive, these references in Theta Tau laws in no way include all the duties inherently a part of the Treasurer's responsibility.

The Treasurer must insist upon payment of initiation fees, badge costs, and dues in advance, in accord with the laws. Should a prospective initiate be temporarily unable to pay his initiation fee or badge cost his initiation should be delayed, or he might obtain a personal loan from an individual member who sympathizes with his problem. In no case should the chapter provide this loan, or the equivalent — initiate one for whom it has not received payment of initiation fee. Such action would violate Theta Tau Bylaws, Chapter V, Section 1, and assuredly cause the chapter continuing problems.

A good credit standing is an asset to an individual and to an organization. Accordingly, prompt payment of incurred chapter debts is important.

When a chapter operates a house, the duties of Treasurer may be very extensive. Accordingly, some chapters divide the financial duties between the Treasurer and a Steward or House Manager; and some provide remuneration, often in the form of reduced house bill, for the Treasurer. If a chapter employs anyone, guidance of the local Internal Revenue Service Office should be followed in regard to withholding tax, medicare, and social security obligations. Extensive information on IRS obligations of House Corporations and Chapters can be found on the house corporation website here. (Each chapter is specifically encouraged to become part of Theta Tau's group tax exemption by completing the group exemption form here. The Central Office will file the annual tax return form 990-N for those groups that are in the group exemption. Chapters not in the group are obliged to file their own return.

2.4.2. Budget

Proper financial management requires a budget setting reasonable estimates of income from dues and fundraising, the chapter portion of initiation fees, and possibly from charges made for meals and lodging; and reasonable estimates of expenditures for national Fraternity dues and chapter activities, including maintenance of headquarters and possibly providing lodging and meals. The national Fraternity's portion of initiation fees, and payments for jewelry and other individual items ordered at cost through the

chapter Treasurer by student members should result in equal income and expense entries and would not affect the budget balance.

Preparing an annual budget based on past chapter experience and reasonable expectations for the immediate future serves to point out to the Treasurer the necessity for balancing expenses with income [either through increasing fees and dues (and charges for lodging and meals) or through decreasing the expenses (and services provided its members)]. Great care should be taken to avoid unjustified optimism in estimating income, and ample allowance should be made for expenditures in the important areas of alumni relations, public relations, and recruitment. Special assessments on members should be avoided whether for meeting general needs or for specific chapter activities. Group activities should be financed by the chapter and therefore included in regular fees and dues charged members.

In accordance with Bylaws, Chapter VII, Part B, Section 4,
fraternity funds cannot be used to purchase alcohol for any Theta Tau activity.

2.4.3. Reports and Orders

So that student members may be informed on the chapter's financial position, periodic reports should be prepared by the Treasurer to be included in the chapter meeting minutes, and a condensed oral presentation made in chapter meeting. Included should be a comparison of actual position with the budgeted position. Care should be taken properly to account for prepayment of obligations by any member and for accounts payable for which no invoice has yet been received.

The Treasurer is responsible for completing the financial section of the chapter's Annual Report to be filed quarterly with your Regional Director and annually with the Central Office (by May 1 each year).

Directions on all forms should be carefully followed. Badges for new initiates may only be ordered via submission of a completed Initiation Report. Other Jewelry may be ordered at the Theta Tau Online Store or directly from the Official Jeweler.

2.4.4. Initiation Report

Initiation Report showing Initiation Date, Roll Number, Initiate Name, Grade Point Average, test scores, Badge Style, and shipping address; as well as the names, dates, and reasons in the cases of those depledged should be referred to the Treasurer by the Scribe. Data such as Roll Number and Initiation Date must agree with those on the chapter roll book page and must be precisely correct since each member's combined Chapter and Roll Number make up their unique identification code. Initiation Report should be emailed promptly after, but never before, the initiation ceremony. Under our laws, an initiate cannot be processed as a member on our database, his shingle and badge ordered, until all procedural details and payments are complete. Prompt handling of payments, initiation reports, and jewelry orders is most important. Payment for initiation and jewelry should follow a report in a timely manner with a single payment preferred covering all fees, dues, and official jewelry may be made payable to "Theta Tau" mailed to the Central Office or payment online.

2.4.5. Semiannual Dues Report

Twice each year, the Central Office sends the Treasurer an invoice and list of the names of all current student member to use in making payment of semiannual dues. The chapter is obligated to pay semiannual dues for a member through the half year in which he is officially granted premature alumnus status as an undergraduate or graduate student (Bylaws, Chapter II, Part B, Section 6). If a student member was reported on a Co-op/Study Abroad Form at the start of the semester, the chapter is not obligated for dues for one declared temporarily inactive while away for a period of industrial training on a co-operative study program (Bylaws, Chapter II, Part B, Section 8). A discount is allowed on each member's semiannual dues if the postmark on the report and payment is no later than November l /

March 15 (Bylaws, Chapter V, Section 3). The accuracy of the Dues Invoice and List is directly dependent upon the chapter having filed all previous Membership Status Change Reports and Initiation Reports in a complete and timely manner. Single payment covering all dues is preferred, payable to "Theta Tau", and mailed to the Central Office or via payment online here.

2.4.6. Records

A chapter's Bylaws should require that any expenditure of chapter funds for unusual or nonessential goods or services must be approved in advance by the Treasurer or Regent. The Treasurer should file, in order, invoices, statements, receipts, and vouchers, each showing the number of the check by which it was paid. Any for which the Treasurer cannot personally account should be signed by the member approving the charge. So far as possible, all expenditures should be made by a Theta Tau Chapter bank account check requiring the signature of one or two of these three: Treasurer, Regent, and Adviser. Checks received should promptly be restrictively endorsed, e.g., "Pay X Bank for Deposit Only." Even so, these checks and, of course, any cash should be deposited frequently so as to avoid loss or inconvenience in the event of theft. A petty cash fund should be discouraged, but a chapter will regularly receive cash and checks. All revenue, of any kind, from any source, should be recorded in an income book. When funds are taken to the bank for deposit, the total sum deposited should be recorded in the income book and also in the checking account register. The extent of a chapter's financial transactions, the complexity of its headquarters operation, and possible requirements imposed by its university may affect the desirable style of financial record keeping.

The very minimum records required would include a general two-column (debit and credit) journal (hardcopy accounting pages or an excel file) in which every receipt and expenditure is listed chronologically; a personal accounts ledger in which a page or sheet is assigned to each member; a signed copy of each periodic report by the Treasurer; a signed copy of each Auditing Committee's report; check and deposit records; a file of cleared checks, and a file of invoices, vouchers, etc. If there are extensive transactions, separate multi-column receipts and expenditures ledgers may be useful in order to classify each entry according to budget category in which it belongs. More extensive records, and more sophisticated record keeping, may be desirable.

sample checking account register

Check Register

Number	Date	Description of Transaction	C	Debit (-)	Credit (+)	Balance
	12/20/04	Previous balance			$435.99	$435.99
1033	12/21/04	Food for engineering picnic		$123.78		$312.21
	12/22/04	Deposit, member dues			$500.00	$812.21
1034	1/3/05	Registration fees for regional conference		$50.00		$762.21
	1/30/05	Deposit, fundraising event			$1,000.00	$1,762.21

sample member journal page

Member Name - General Journal

	Date		Description	Post Ref.	Debit	Credit	Balance
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
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Naturally, chapters may instead track such information electronically which should be frequently backup and preserved. The inexpensive nature, easy use, and extensive capabilities of current financial software packages make this highly desirable.

2.4.7. Headquarters Fund

Whether or not the chapter currently maintains a permanent headquarters, it should follow a plan requiring regular obligatory payments into a headquarters fund by its members (preferably while each is a student). These payments should be kept separate from the general chapter funds and transferred regularly to a nonprofit house corporation headed by a board of elected (usually alumni) Directors. Prior to initiation, it is suggested that each one to be initiated sign a Housing Note representing his obligation to make these regular payments into the headquarters fund. From these funds should come the long-range capital expenditures involved in acquiring, remodeling, and equipping chapter headquarters. Suggestions may be obtained from the Central Office for establishing this fund.

2.4.8. Indebtedness

Should a student member's account become a month overdue, the Treasurer (and later, if necessary, the Adviser and other chapter officers) should counsel with him regarding the problem. The Bylaws, Chapter VII, Part A, Section 2, provides that house privileges shall be refused in such a case, until full settlement is made. In his attempt to collect a delinquent account, the Treasurer should get the member's written acknowledgment of the amount owed, and they should mutually agree upon a date when the total will be paid, or upon a reasonable repayment schedule. The chapter might be able to aid a brother with financial problems by helping him to find a part-time job, or with a loan from individual members (not from the chapter as a whole).

If delinquency continues with payment date(s) not met, the chapter should have an established policy to follow. The delinquent member should be sent a letter detailing his indebtedness and reminding him of the date it was due. Further discussion of the problem should be suggested, and a deadline established for discussion or payment, before the matter is brought to the chapter for disciplinary action or to the Small Claims Court for settlement. The Central Office provides a collection service for chapters to use in collecting sums past due. The service uses a very affordable service for the chapter and a "diplomatic" approach to the member for such collections. It encourages that such action be sought before debt is a year old. See the Collection Referral Form.

If the efforts above have been exhausted and are unsuccessful, delinquent members who deliberately refuse to pay their debts should be expelled. **Every member should pay his account in full before leaving college or at the end of each school year.** If he cannot, he should be required to sign a Promissory Note payable within a year. The Treasurer should list for the Scribe any brother ceasing to be a student member who is indebted, and any previously indebted alumnus discharging his financial obligations, so these may be reported to the Central Office on the next Membership Status Change Report.

2.4.9. Badges

Every chapter shall include the price of the badge in the initiation fee it charges new members. A price list showing the current cost of each style badge, optional guard, and other Theta Tau insignia is available from the Central Office. The Initiation Report is used to order badges for all new members as outlined in Section 2.4.4. If a member loses their badge and needs to order a replacement, this can be done directly from the Official Jeweler. The jeweler will check with our Central Office to confirm membership before fulfilling orders for official jewelry.

2.4.10. Letters, Emails, and Communications

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When communicating on Fraternity business, observe the standards cited under "Correspondence" in paragraph 3.14 of this Manual and the Social Media Risk Management Policy.

2.5 Corresponding Secretary

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The duties of this important position may be briefly stated, but when diligently executed, they can be most extensive and of much service to the chapter and to the Fraternity. A great resource available for your office is the Theta Tau Style Guide – The Theta Tau Brand which provides design and use help.

2.5.1. Duties

The Corresponding Secretary's duties are outlined in the Bylaws, Chapter IV, Part B, Section 5. The Corresponding Secretary shall correspond diligently with the other chapters, the alumni associations, the Executive Director, and the alumni of the chapter, shall be the chapter's correspondent to The Gear, and shall keep the chapter alumni record up-to-date. In order to correspond regularly with a large body of alumni, the Corresponding Secretary should prepare and distribute at least annually a chapter newsletter. Also, the Corresponding Secretary is often required by his chapter to issue invitations to alumni to participate in chapter-sponsored events. Suggestions on both of these matters in Paragraph 3.7 of this Manual should be studied.

As the chapter's correspondent to The Gear, the Corresponding Secretary is responsible for submitting chapter letters at times designated by the Editor for publication in The Gear. These should follow the theme specified for the issue, but may also contain other material of general interest to the members of the Fraternity at large. Captioned photographs, news stories, feature stories, and alumni notes involving any members of the Fraternity should also be submitted prior to the established deadline. The Corresponding Secretary should handle on a timely basis the ordinary correspondence of the chapter, including that with nonmembers — invitations, expressions of thanks, congratulations, and sympathy when these are in order.

2.5.2. Membership Records

So long as there is one alumnus of the chapter whose address is unknown, the Corresponding Secretary's work in this area is incomplete. Concerted effort to locate a "lost" alumnus will usually result in success. There are several potential sources of information: The latest Theta Tau Membership Directory, the engineering division office, the university alumni association, his parents, classmates, technical society headquarters, a telephone call to directory assistance in the city of his last known address, and the Theta Tau Central Office. The Central Office can provide a spreadsheet showing alumni addresses by chapter and/or geography upon request. It is far better and easier to get information on a member while still a student, and then to maintain close contact through the years so that extensive research will not be required to obtain a current address later.

When one is initiated, they should also complete (to the extent possible) an information card (hardcopy or electronic/excel) for the chapter. Such information should be kept by the Corresponding Secretary in a secure location. At graduation or leaving school, the Corresponding Secretary should have the individual complete the information further. If a member passes away or is expelled, the record should be annotated to reflect this permanent change along with the date the annotation was made. When a member's address becomes invalid, this also should be reflected in a temporary way (since a good address may be identified later). When a member moves and provides a newer address, this address should be updated and the date of the change noted as well (so that an excel file can be easily sorted to reflect only address changes beyond a certain date if needed). Periodically, the information file's completeness should be checked against the roll book record. Only initiated members should view the roll book pages.

A chapter should use computer printed labels (which can be provided by the Central Office upon request) for its general mailings to alumni, but if the chapter file cards are ever divided among those assigned to some task using them, the cards should never leave the chapter headquarters. Any changes in alumni

address information from the Central Office should be entered promptly in the chapter's records. Similarly, the Corresponding Secretary should inform the Central Office of new addresses which come to his attention. In this way, contact between the member, his chapter, and the national Fraternity can be maintained effectively.

2.5.3. Letters, Emails, and Communications

When communicating on Fraternity business, observe the standards cited under "Correspondence" in paragraph 3.14 of this Manual and the Social Media Risk Management Policy.

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2.6 Other Chapter Officers

It is the standard practice for the Regent to appoint the Marshal, Inner Guard, and Outer Guard as required by the Ritual. The Regent should consider especially the degree of interest each has in the ritualistic aspect of fraternity operation, and the likelihood of his discharging well the duties of office.

It is also standard practice for the Regent to appoint student members to serve as Recruitment Chair, Pledge Instructor, Professional Development Chair, Service Chair, Brotherhood Chair, Academic Chair, Risk Management Chair, and such other chairmen and committees as may appear desirable in order that the chapter's program may be effectively carried forward. Careful consideration should be given to these appointments so that the chapter has an effective administration. The progress which the chapter makes will depend in large measure on the interest and ability which each member brings to his post. Refer to an Officer Election Report for fuller list of potential officers.

When the chapter operates a house, it often elects a house manager and/or a steward to supervise purchases and maintenance. He sometimes receives a reduction on his monthly house bill as compensation for his services.

2.7 Adviser

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One or more alumni or honorary members may serve as Advisers. A common arrangement is to maintain a Faculty Adviser, Housing Adviser, Alumni Adviser, and perhaps others. It is a rewarding position carrying heavy responsibility for the proper conduct of chapter affairs. Through his mature guidance and understanding counsel, Advisers can do much to assist the chapter officers and student members in their personal, professional, and social development. Advisers for appointment should be communicated to the Central Office via the Officer Election Report or the Adviser Recommendation Form.

2.7.1. Duties

Advisers are charged with maintaining a personal contact with the chapter officers and serving as official representative of the Executive Council on each campus (Constitution, Article IV, Section 5). The Adviser should administer the pledge tests, should be invited to attend all initiations, and should witnesses the roll book page of each initiate.

As an official representative of the Executive Council, he should make sure that the laws and customs of Theta Tau are observed by the Chapter. Accordingly, he should review the Constitution and Bylaws, Risk Management Policy, Policy and Procedure Manual, and all parts of this Manual.

Advisers should periodically attend chapter meetings, and should remind the officers when a deadline may be approaching. At least annually, Advisers should conduct an audit of the chapter's finances for the previous semester or year to ensure that past Treasurers have adequately met financial duties, that current budget meets expected needs, and so that new Treasurer can be assured of assuming office with a

clean slate. More general information about the nature of serving as an adviser to any organization may be found in the Advisers Manual or the advisory team webpage.

2.7.2. Procedural Details

Very soon after online Pledge Forms have been completed for particular group, the Central Office will email a Pledging Report Form to the Adviser to review the forms submitted. If necessary, the pledge and/or chapter should be queried on any answers which may be incomplete and inaccurate. If there are remaining questions or concerns, the Adviser should contact the Central Office.

At the beginning and again in the middle of the school year, the Central Office posts the current Pledge Test online for the Adviser to access. This test is to be passed by each prospective member before initiation. The chapter is to provide Part B. The Adviser, or his agent, is charged with administering the pledge tests.

Immediately following attendance at an initiation ceremony, the Adviser should check the newly signed roll book pages for completeness, and then sign them on the third line provided for witnesses.

When an undergraduate member requests alumnus status and achieves the chapter's four-fifths approval, the Adviser should carefully review the case and form completed; and, if appropriate, indicate approval on the form before submitting it to the Central Office.

In addition to these areas in which the Adviser has specific responsibility, advisers have the general obligation to see that the student officers adequately discharge their duties at the proper times, and to follow through on any cases of failure to do so.

2.7.3. Other Matters

Advisers should have a copy of the Chapter Bylaws and should insist that these, as well as the Fraternity's laws and policies are observed. Because of the importance of recruitment, membership selection, and new member education, Advisers should provide mature guidance to the student members in these areas.

Advisers should help in the preparation of an annual budget for the chapter, review the monthly financial reports made to the chapter by the Treasurer, and require (likely participate in) the regular audit of the books annually or as often as there is a change in the position of Treasurer. The Adviser should counsel with the chapter to avoid deficit spending either by reducing expenditures or increasing fees and dues. Advisers should consult with chapter officers in advance on all major expenditures.

Before any member becomes seriously delinquent in financial or other responsibilities to the Fraternity, Advisers should counsel them privately and seek a resolution of the problem (see paragraph 2.4.8 of this Manual). Any student member financially delinquent upon leaving school should be required to sign a Promissory Note acknowledging his indebtedness and intention of paying it within a year (Bylaws, Chapter VII, Part A, Section 3). Through advance counseling, avoid any problem which might later result in disciplinary action against a member. Failing in this, Advisers should be certain that the chapter follows carefully the procedures in Bylaws, Chapter VI. The Disciplinary Action Checklist/Form has been developed to remind those involved of the steps to be taken in advance of any disciplinary measures as well as the procedures to follow if it is necessary to hold a trial of a member.

To assure the effective presentation of the initiation ritual, the Adviser should provide guidance at the time of the rehearsal prior to each initiation ceremony.

Although certain chapter officers are charged with the safekeeping of specific chapter properties and records, the Adviser should keep a list of these and of their locations. If the chapter lacks an adequate

headquarters where these may be kept during the summer, Advisers should help to provide a good place for storing them. If the framed charter cannot be displayed in the chapter headquarters or other suitable place, it may be hung in an Adviser's office.

3. Chapter Functions

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3.1 Selection of Members

One of the most important obligations one undertakes when he becomes a member is the selection of new members to perpetuate the Fraternity. Before voting on candidates, the Regent should review in the chapter meeting the laws governing eligibility, and the laws and policy regarding selection of members.

A candidate cannot be considered formally pledged until receiving at least a 3/4 favorable vote of the chapter. Election to full membership is by later receiving at least a 2/3 favorable vote by of the chapter. Pledging and membership votes are by secret ballot, separate, and apart, of all student members of the chapter.

To achieve a truly secret, every member must vote in a way that no one can detect how he voted. A box especially designed to receive white balls and black balls (or cubes) is ideal. If a written or printed ballot is used, then every member must be required to print legibly on the ballot either "yes" or "no"(or “Y” or “N”).

It is the policy of Theta Tau that to be eligible for membership one should have the following characteristics:

- Be of good character and firm convictions
- Be a capable student and a person of practical ideas
- Possess the essential qualities of brotherhood and an agreeable personality

Although athletic prowess, family wealth, social prominence, engaging personality, and brilliant mentality are all fortunate possessions, they are alone a basis for selection of members. While such possessions should not bar anyone to membership, the real test is something less easily defined. It is the personal attribute of a person whom you wish to have as a brother, whom you can take to your home, with whom you may live in close fraternal relationship, whose attributes will benefit the chapter and its members, whose abilities and interests will contribute to the development of the chapter’s program, and in whose friendship you will feel honor and pleasure.

3.1.1. Student Membership Requirements

To be initiated, a prospective member must be a student at least eighteen years of age, eligible to pledge according to his university's rules, and regularly enrolled at a school with a Theta Tau chapter in a curriculum approved for that school by Theta Tau. A list of curricula which meet these requirements at each school is provided by the Central Office and should be kept on file by the chapter. To add a new curriculum to the list of those that have been approved, a chapter must submit the current school catalog that includes that curriculum to the Executive Council for its approval. Such approval must be sought in advance of pledging an individual in such a curriculum.

A prospective member must possess the qualities of brotherhood, as determined by the chapter, and demonstrate skills and an attitude beneficial to Theta Tau. An initiate must have received the favorable vote of the chapter, must have an overall grade point average at least as high as that which will be required for graduation, must not be a member of a competitive fraternity, must not be within six months

of the end of his academic program, must have properly completed the Online Pledge Form at the time of his pledging and paid the Pledge Fee, must have passed the current pledge test, and prior to his initiation, must have paid in full the national and local initiation fees and the cost of a badge. There are no exceptions to these requirements.

3.1.2. Honorary Membership

There are many ways in which a chapter may chose to honor or reward someone who has assisted or helped the chapter. A thank you letter or card, an invitation to dinner where they can be presented with a plaque of appreciation, or any form of public recognition are common and certainly appropriate. Honorary membership in Theta Tau, however, is not to be considered merely a form of thanks or award. The following words of Founder Schrader are designed to provide guidance in the selection of honorary members: "The chief qualifications of one otherwise eligible is service to Theta Tau. One should never be elected simply because he is a great scientist, because he is a fine teacher, because he is a prominent engineer, but because...he is interested in Theta Tau, that he believes in and will foster its ideals, that he will take an active and personal interest in the undergraduates as well as alumni, and will act as their adviser and older brother. There are numerous organizations that honor a person for his professorial, his scientific, his engineering accomplishments. Honorary membership in Theta Tau is something more than that. It is the recognition of the individual who, by his past or his possible future accomplishments, is recognized as one who by precept and example can point the way for his younger brothers in Theta Tau.

"Many of the qualifications...for active candidates apply equally well to honorary members. Of his personal and professional integrity there must be no question. Do not select a faculty member who will regard this simply as another honor due his position, but carrying no duties and very light obligations. Choose as honorary members those who will take an active interest in the Fraternity, will help in the selection of new members, will supervise chapters in their internal affairs, and who will give as well as receive from their brothers that cooperation and respect which is inherent in membership."

Procedure is detailed in the Constitution, Article V, Sections 6 and 7; and in the Bylaws, Chapter II, Part A. This procedure must be followed carefully each time a chapter desires to initiate an honorary member. Note especially that a chapter may initiate but one honorary member for each fifty student or alumnus initiates, or fraction thereof, on its chapter roll (Bylaws, Chapter II, Part A, Section 1). This ratio applies regardless of whether previous honorary initiates are still nearby or whether they are still living. Therefore each chapter should keep a list of all those it has initiated as honorary members on an introductory page in the roll book. Since a vote of the chapter's alumnus and honorary members must be solicited whenever an honorary initiate is proposed, the chapter should utilize information available from the Central Office. In the letter to alumni and others, the chapter must include all information cited in Bylaws, Chapter II, Part A, Section 4, clearly stating that the list of memberships includes all Greek letter organizations to which he belongs, quote pertinent sections from the laws, and clearly state the way in which he fulfills the eligibility requirements stated in Constitution, Article V, Section 6.

Past experience shows that a chapter wishing to initiate an honorary member should not discuss this with a prospect until the sixty-day period allowed for alumnus votes has elapsed. The chapter should also alert its alumni by letter not to discuss this with the one proposed until after the chapter has reported that the alumnus vote is favorable.

After approval, the candidate should complete the Honorary Pledge Form before initiation, and be given a Membership Manual to keep. Before initiation, the candidate should pass the Honorary Pledge Test (provided by the Central Office). This test covers material in the Pledge and Membership Manual, but is somewhat easier than the one given to student candidates. The individual or the chapter pays pledging fee, badge cost, and initiation fee for honorary initiate (Bylaws, Chap. V, Sec. 4 & 5); and the Treasurer

sends Initiation Report along with payment of these costs to the Central Office promptly after initiation. An Honorary initiate assumes status as any other alumnus member of the chapter in the Fraternity.

3.2 Recruitment, and New Member Education

3.2.1. Importance

Two areas of chapter operation determine the future strength of an individual chapter. They are: 1) recruitment (or rush) and 2) new member education (or pledging).

Every chapter, whether or not it maintains a house, needs to have these activities well organized. Without an effective recruitment program, students with the potential to be good Theta Taus cannot be obtained. Even good pledges can become poor members if their preparation is lax or misguided. The object is to have the best qualified engineering students become Theta Tau members. The end result of a good new member education program is to make good members who are ready to be full participants in all aspects of the chapter's operation from the day of initiation.

3.2.2. Recruitment Committee

Each chapter must regularly appoint a recruitment committee, headed by a Recruitment Chair who is responsible for all recruitment activities of the chapter from initial contact until each prospect is pledged or dropped.

The committee should be the ramrod of the recruitment operations but it should insist upon the full participation of all members and pledges in functions. It should begin its work in the summer and continue throughout the year if necessary. Periods of concentrated rush should be carried out at the beginning of each term. The committee should follow up immediately after a potential candidate has been a guest. The rushee should not be allowed to "cool off" for a while if the chapter is interested in him. Each one should be considered and should be: 1) invited back; 2) asked to pledge; 3) deferred until a later date; or 4) dropped from the list as unacceptable.

3.2.3. Obtaining Prospective Members

Some universities or colleges of engineering will supply information or provide events (such as orientation or campus tours) to help you meet the new students entering school. This is a very good method for obtaining the names of the potential new members. In many cases, a crucial step in the process will be for your chapter and its members to offer assistance with orientation, tours, or move-in day. A moment to talk about Theta Tau at such events should be requested if possible, or flyers handed out if permitted, or failing that, simply wear your letters so that new students see Theta Tau.

Separately, each chapter should maintain an on-going list of contacts and names of each member's acquaintances who should be considered for membership. An excel file would be the most common manner to maintain such a list today but it could supplemented via a facebook page as well.

The excel record should include each individual's contact information, number, means, and dates of contacts, and their response, participation, or attendance "history" (i.e., the results of contacts, pledge bids, etc.) The file can be categorized to keep the working list manageable with such designations as: "current rushees," "deferred til next semester," "dropped," "pledged," etc. A detailed excel template is available from the Central Office. Additional recruitment resources are available from PhiredUp here with whom we periodically consult:

3.2.4. Contacting Prospective Members

Participation in campus "rush week" activities may be desirable dependent on your campus. If carried on separately/independently of campus rush, your chapter's concentrated recruitment effort should be

started within two weeks of the opening of school. The first contact with prospective members should be made during the summer or very early in the school year; however, recruitment should be considered a year-long activity. Never discourage a good candidate for membership simply because "rush week" is over or pledging has already begun. The calendar should never be used as an excuse to turn away a potential Brother. Instead, stay in contact, introduce the person to other members, invite the person to open activities and events, and be sure that person tops your list for next quarter or semester.

Face to face, in person, real life contact is always the best way to introduce yourself and Theta Tau to a prospective member. Look the prospective member directly in the eye, offer a firm hand shake, and listen carefully to his name. Another way to introduce the Fraternity to the prospective member is to use promotional material available from the Central Office or via your website, facebook page, or other social media. The national Fraternity information should be weaved together with the chapter's own history which includes contact information (names, emails, phones) for the chapter's recruitment committee. During the regular recruitment periods, publications can be handed to those who are contacted personally. They may also be used as inserts with letters distributed during the summer to new engineering students whose records indicate they should be contacted. In some cases, leaflets directed to specific questions, designed to promote fraternities generally may be useful. However, not more than two printed pieces should be handed a potential new member at a time.

A typical summer recruitment letter (Figure 3-1) may be helpful in introducing Theta Tau to a large group of engineering students in a cost-effective and efficient way. Each letter may be personally signed in ink by the Recruitment Chairman. Remember that the first impression of Theta Tau a prospective member receives may determine his future interest — make every effort to make this first impression a good one.

An effective recruitment publication or page (hardcopy or electronic) should be small, of high quality, and professionally done. The topics should be concise, straightforward, and to the point, including:

1. a clear explanation of the nature of a professional fraternity
2. a brief history of the Fraternity and the chapter
3. the chapter's balanced program of service, professional development, and brotherhood activities
4. thumbnail sketches of outstanding student members
5. mention of outstanding alumni
6. information about new member education process
7. financial and other obligations of membership
8. a chapter picture
9. informal pictures of chapter activities, etc.
10. other information applicable to individual chapter.

Personal contact is vital in recruitment procedures. The members (and pledges) should meet each candidate so they can make an evaluation of him. Many systems can be used to accomplish this:

1. rush week
2. campus orientation, tours, or move-in
3. recruitment events
4. professional meetings
5. dinner dates, cookouts, etc
6. luncheon meetings
7. chapter activities, events, or other functions

Several of these methods should be used by each chapter in addition to others adaptable to the situation. Invitations (printed or electronic) and all contacts should be made as personal as possible.

Chapter Advisers and other Theta Tau members on the faculty should be encouraged to attend and participate in as many of the rushing functions as possible. Their attendance not only makes a favorable impression on candidates, but also gives the faculty an opportunity to meet the prospective members and, if asked, to make recommendations.

Acquainting the prospect with Theta Tau has already been discussed indirectly. Every time a Theta Tau meets people, he is acquainting them with his chapter and its quality through his own actions. Other methods are:

1. Prestige of the chapter on the campus. *Is it active and well respected by students and faculty alike?*
2. Individual members and their pride in the chapter, shown among friends and fellow students.
3. Word of mouth by the members, to acquaint the candidates with Theta Tau and its members.
4. Faculty members who do not belong to Theta Tau but who are informed about it and favorably impressed by its program.
5. Published (printed or electronic) material explaining the Fraternity and its purposes.

Figure 3-1

July 9, 1994

Dear Sidney,

I'm glad to hear that you are coming to Tech and that you will be a fellow engineer. I think the School of Mines is one of the best, and I know you will be glad you chose it.

One of the best ways to succeed at Tech is to be a member of a strong fraternity. Theta Tau is one of these fraternities. Since ours is a national professional engineering fraternity, Theta Tau offers the common professional bond of engineering as well as the very desirable aspect of brotherhood.

The members of our chapter of Theta Tau participate in a wide variety of campus activities. Currently, two of our members are class presidents with several holding other class offices. Not only do we have members active in this way, but we also have members participating in such activities and organizations as the college football team, intramural sports, the college yearbook, and honor societies. During National Engineers Week in February, the fraternity as a whole plays a large role in the organization of many activities. Our chapter of Theta Tau accomplishes this while still maintaining the highest grade point average of all the fraternities at Tech.

A fraternity has much to offer a student. One of these is the benefit of a homelife. One might say it's a home away from home where you have others to turn to when the going gets tough. This is especially true when your courses become a real challenge. It really helps to have an older fraternity brother who's been through them before. In addition, our fraternity's professional development program helps prepare the member for the years after graduation.

We currently have several rush events scheduled for the upcoming year with the first one on September 24. The purpose of these is to become acquainted with the new students on campus. Although we'll be in contact with you later regarding this event, I hope you will put it on your calendar now and plan to attend.

I think you've made a wise choice in selecting the SD School of Mines and Technology and hope you will consider Theta Tau when you consider fraternities.

Meanwhile, if you have any questions, please write me this summer at the address above, or stop by the Theta Tau fraternity house this fall when you get to school. I'll be glad to be any help possible. Have a good summer and hopefully I'll see you next fall.

Yours truly,

Kurt Selzle
Recruitment Chair

3.2.5. Choosing New Pledges

After large events such as a dinner, etc., the members should meet and discuss all of the candidates while their impressions are still vivid. At this time, some may be eliminated from consideration and favorable prospects can be chosen for more focused recruitment.

Members that will be active and interested Theta Taus are essential. Each candidate should be considered for his worth as an individual, not overlooking "gems in the rough." Some qualities to consider and seek may be:

1. good character/values
2. interest in Theta Tau
3. a pleasing personality and neat appearance
4. ability to excel as a student
5. interest in service to their community and to others
6. the potential to develop into a top-rate engineer
7. professional interest in engineering
8. leadership positions in other campus organizations
9. other outside interests (athletics, music, travel, etc.)

These items above can be recorded for each person on the file tracking information on each candidate. Each candidate should be met by multiple members (and preferable on multiple occasions) before being voted on. After each candidate has been discussed thoroughly and his "boosters" have explained his qualities, voting can take place — always by secret ballot. Only the Regent should see inside the votes and should not disclose the number of negative votes, but merely weather the candidate was approved or rejected. Disclosing a small number may tend to cause frustration among some members. If the vote is favorable by at least ¾ positive vote, the Recruitment Committee can then extend, on behalf of the chapter, a bid (the invitation to begin pledging).

A candidate's grades should be checked before he is asked to pledge. One carrying an average below the school minimum for graduation is unlikely ever to be eligible for initiation. Many poor students switch majors or drop out completely. Poor grades are to be avoided, regardless of the person's other qualities. On the other hand, high grades alone are not enough; other factors must be considered. The Adviser can help obtain or verify grades from the Engineering School. The practice of initiating first semester freshmen may be carried on with caution, and only after waiting for grades from the completion of the candidates first semester of school. Since many freshmen leave engineering during or at the end of their first year, many chapters refrain from initiating them. Even if they are not to be formally bid and pledged in their first year, the recruitment, involvement, and interaction between the chapter and such freshmen engineers is a very desirable and necessary means of recruitment.

Most chapters will tend to initiate more sophomores and juniors than those in other classes; however, as a professional fraternity, the value of membership to those in any class (freshmen through seniors, and even graduate students) is real. Note that our laws prohibit the initiation of anyone less than 6 months from completion of his academic program.

3.2.6. Extending a Bid

The invitation to pledge should be extended to each candidate personally and privately by two or more members. The bid should be extended by mail only if it is a school rule or if the fraternity tradition on

your campus dictates such. After the candidate verbally accepts the bid, it would be desirable for the Regent to send a brief letter of welcome.

When a candidate is asked to pledge, the general laws and customs of Theta Tau — local and national — should be explained, including financial obligations, membership requirements, duties, responsibility to remain a student member as long as enrolled, participation I chapter functions, etc. Any questions should then be answered accurately and succinctly.

When extending the bid, it is good practice to emphasize the aspects of membership which seem to appeal to the given candidate. However, never give a distorted picture. No candidate should be "pressured" into pledging; this often results in undesirable situations later. At this time, also, the candidate should understand that pledgeship is a period during which they learn historical and factual information about the national and local organization, get to know other pledges, students, and perhaps alumni, and learn how to become a member by participating in the chapter's or modeling their own activities and events.

At the time of pledging, each one must complete the Online Pledge Form and pay the Pledge Fee. If a prospective pledge does not honestly intend to pursue one of the majors appearing on the Fraternity's list of eligible curricula at his school, the candidate should not be pledged. At that time, the pledge pin is loaned to the candidate and only to be kept or worn during pledgeship. The Pledge Pinning Ceremony in the Ritual is to be used to induct candidates into the pledging process. Each one is given a copy of the latest edition of the Membership Manual. This book is to be keep as long as the candidate is associated with Theta Tau (as a pledge or later as a member). Membership Manuals and Pledge Pins are available from the Central Office.

One who is depledged by the chapter should be notified of this in person, face-to-face, and never via letter, email, or text message.

3.3 New Member Education

Commented [X17]: toPledge Educator Manual or perhaps parts to New Member Education Manual

It is the obligation of the chapter to develop members who have professional interest and ideals, social compatibility, ability to work with a group or individually, and a strong bond of fraternal brotherhood. The pledge education program should strive to impart this. The best pledge will not become a good member automatically — only through instruction, example, and involvement can one be effectively taught the laws, customs, and operations of the Fraternity.

The attitude and spirit of the chapter carry over to the pledges. A spirit of pride in the chapter must exist to "teach" or "model" it to the pledges. This is also true of everything the chapter does and stands for — it is an intangible that cannot be replaced. Far from being just a work period, the pledge period is a time for the development of good members and the improvement of the chapter as a whole.

The purpose of the education program should never be to create obedient pledges, but instead to consciously, deliberately, and necessarily create good, active, involved, and interested members.

3.3.1. Contact with Relatives

Favorable contact should promptly be established with the parents of a new pledge. It is suggested that a personalized letter signed by the Regent be sent to the parents of each one within a week of pledging. A typical letter of this type is shown on the next page in Figure 3-2. If a pledge's parent is a Theta Tau, this fact should be recognized in the letter. At least two weeks before the scheduled initiation, each Theta Tau relative of an initiate should be invited to attend his initiation.

3.3.2. Pledge Instructor

Each chapter should have an excellent new member education program administered by a Pledge Instructor, consistent with Theta Tau's Risk Management Policy on hazing as well as the university's rules. The Pledge Instructor should preferably be appointed by the Regent. The education program is not subject to alteration by the whim of an individual member, and individual members may not add requirements to the pre-defined education program. Most allegations of hazing made against Theta Tau chapters have resulted from individual members adding an activity or altering the details of an event or activity in such a way that leaves the chapter and fraternity open to hazing accusations and sanctions by their school. The chapter should alert members each semester to the danger created by ad hoc additions or alterations to the pre-defined education program.

The primary duty of the Pledge Instructor should be to supply the necessary induction and education to assure that candidates will become good members upon initiation. To implement this, the Pledge Instructor should assign the learning of Fraternity information; invite and encourage participation in all open chapter events and activities; develop the relationship between each individual pledge and all chapter members; help the group in organizing their activities and events; direct the education of the pledges in fields in which they should receive instruction; by precept, example, and discussions with the pledges, so orient their thoughts and actions toward the end that they may become outstanding members upon initiation, schooled in the chapter's operations and ready to become an active participant in Theta Tau. Remember that the goal of the education period is to create good members and future leaders, not obedient pledges. Someone who is merely good at following orders may never make a good leader.

FIGURE 3-2

October 6, 1994

Mr. and Mrs. John Smith
111 16th Avenue, East
Indianapolis, Indiana 46000

Dear Mr. and Mrs. Smith:

We are pleased to announce that your son, Thomas, has become a pledge of our National Professional Engineering Fraternity — a fact which you probably already know. We feel that this relationship will be of mutual benefit to him and Theta Tau. While in school, membership can provide valuable experiences contributing to a student's complete education. At the same time, the chapter provides a home away from home.

As a professional engineering fraternity, Theta Tau limits its membership to those in an engineering field. Since we believe that a fraternity should contribute positively to student's education, scholarship is given a major emphasis by our chapter, and our service, professional and brotherhood activities are molded around it. Generally, we have one informal social activity a month. Each month, our professional development program brings our members and pledges an opportunity to associate closely with professionals and to become better equipped for the years after graduation.

Our Adviser Dr. Sam Johnson and the other Theta Tau members on the Purdue faculty take an active interest in the affairs of our chapter.

Each prospective student member is required to fulfill a period known as pledging. During this time, the candidate is instructed in the principles and history of the Fraternity and given an opportunity to demonstrate interest in Theta Tau and ability successfully to meet the academic standards of the University. Upon successful conclusion of pledging, the candidate will be formally initiated into membership. The ceremony of initiation (or Ritual) is a meaningful and serious ceremony stepped in over 100 years of history and tradition. It does not include any form of hazing. As a member, the student enjoys the additional benefit of leadership training as a participant in the operation of the chapter.

On behalf of all our members, I should like to invite you to visit the next time you are on campus, so that we may become acquainted. In the meanwhile, if you have any questions regarding our Fraternity, I should be happy to answer them for you.

Yours truly,

James M. Walter, Regent

The Pledge Instructor should also be responsible for providing mutual liaison between the chapter and the pledge class; be responsible for reporting the progress of the pledges individually and collectively to the chapter; and be responsible for the holding of a pledge class meeting at least once a week. Since each candidate for membership should be considered based on one's own merits and qualities, the class as a whole should never be discussed or judged collectively and impersonally.

3.3.3. New Member Education Standards

Table 3-1 on the next page lists the standards which should be met in new member education. Appropriate topics for pledge meeting talks which may be given by the Pledge Instructor or others particularly qualified are:

a. Chapter government - talks from major officers
b. What makes a good pledge? A good member?
c. Finances - chapter, house corporation, and national Fraternity
d. Hospitality and Etiquette
e. The balanced program of Service, Professional Development, and Brotherhood activities
f. Extracurricular activities on the campus
g. Public relations and Risk Management policies
h. Study suggestions and school counseling
i. School history and traditions
j. Intramural athletics

3.3.4. Other Education

One of the most erroneous beliefs sometimes held is that, "We're engineers and therefore need not concern ourselves with teaching or learning of social graces." Engineers have to live with people, work with people, eat with people, and communicate with people every day of their lives. No successful engineer can get along without so-called "social graces," and the best time to learn them is as a student.

Proper table manners as well as other rules of etiquette one needs in everyday living should be taught and observed. Formal lessons are not at all out of line, and often members will find that they too need a little "brush up" work. Valuable pointers are found in the Membership Manual under "The Engineer is a Professional." Professional and social events are an important function in every chapter. A relaxed attitude and more enjoyable time is had by all if good manners are practiced naturally rather than in an embarrassed, amateurish way. The pledges should always be included in professional meetings and social functions sponsored by the chapter.

The members should show an interest in each pledge's grades and any problems in studying. Help from older members is of great benefit to the underclassmen.

Pledges should be encouraged to participate in extracurricular activities which help make them well-rounded individuals so long as these do not adversely affect their progress toward a degree. Such activities include community service, civic work, church work, technical societies, honor and departmental societies, the school engineers' magazine, Engineering Council, Engineers' Day, student government, athletics, intramurals, etc.

Theta Tau's Risk Management Policies should be reviewed so that all are familiar with the risks, liabilities, and dangers that may be associated with events, activities, and daily college life.

TABLE 3-1

STANDARDS FOR PLEDGE EDUCATION

- Effort should be made to make each pledge feel he is a part of the chapter although still a prospective member. Special care should be exercised to be sure that no pledge ever feels that "really to belong" he must drink any alcoholic beverages or participate in any act of vandalism or other activity which may embarrass him publicly or be contrary to his obligations to God, his nation, or himself.
- Assignments should be given to the pledges from the Membership Manual. Each should learn the contents of the Manual as well as information concerning the local chapter and its members.
- Pledges should be given tests periodically on the assignments. These tests should only be in written form.
- Projects of service to Theta Tau should be assigned to each pledge, and those projects should be completed progressively through pledgeship and prior to initiation. It is also a good idea to involve Big Brother's in these projects to protect the chapter from allegations of hazing.
- Joint Pledge-Member functions should be planned in addition to the normal day to day contacts. These may be picnics, parties, professional meetings, etc.
- Close relationships between members and pledges develop the fraternal bond of Theta Tau. Each chapter should use an "adviser system," e.g., pledge father-son, big brother, sponsor, et al. Each pledge is thus brought closer to the chapter through personal contact with a specific member. A pledge's problems, questions, shortcomings, etc. can be resolved best by this relationship.
- Pledge meetings should be held once a week or at least as often as the chapter meets. Chapter and pledge meetings may be scheduled for different times the same evening with a period between for informal contact among members and pledges. However, care should be taken to ensure that pledges do not view membership in Theta Tau as a once-per-week obligation. To provide adequate liaison, the Pledge Instructor must attend both meetings.
- The Pledge Instructor should meet with the pledges and give them instructions from the Membership Manual on chapter government and in areas of character development.
- The Pledge Instructor or chapter officers should review the school's hazing policy to make sure that activities planned do not run afoul of some local college prohibition.
- The Pledge Instructor or chapter officers shall remind members that the education program is defined by the chapter and individual members may not add requirements or alter activities. This is necessary to avoid an individual member inadvertently making the chapter subject to a hazing accusation.
- The pledges are to be evaluated individually based on each one's qualities, characteristics, potential, and performance. Pledges are never judged collectively as a group.

The pledge class should be self-governing in so far as possible and should conduct its own meetings (especially as the education period gets further along). This teaches group participation and develops leadership. Early in the school term, officers may be elected by the pledge class (president, vice-president, and secretary-treasurer), and the succeeding meetings should be conducted by the pledge class president. Of necessity, the Pledge Instructor will handle a large part of the agenda during these meetings.

3.3.5. Study Assignments

Table 3-2 at the bottom of this page is a suggested list of weekly pledge study assignments. These include most of the information that every pledge should know about the Fraternity. For shorter pledgeship periods, these assignments may be combined into larger ones.

"Before initiation, every pledge must pass a written examination supplied by the Fraternity..." covering a portion of the nonsecret information about Theta Tau which every member should know. The National Pledge Test is posted on the website for the Adviser and chapter to access. By each question appears the score (in percentage) to be allowed for that portion of Part A. Part B covering local information is to be provided by each chapter. The tests given periodically during the pledgeship period, and the final pledge test, should be used as educational tools through review and correction with each pledge. The Bylaws provide that the Adviser or his agent shall administer these tests, and that the Adviser and the chapter officers shall establish a passing grade for the examination. 75% is recommended as a passing grade on each part. Part A and B are to be graded and the grades recorded by the Scribe on an Initiation Report. Although colonies are obliged to send graded pledge tests to the Central Office, chapters should not.

The Initiation Report is used to report each one initiated (see Section 2.4.4) and also to report those who are no longer pledges so that they may be removed from the national database.

3.3.6. Hazing

The Fraternity strictly prohibits hazing. Your university's rules and state laws do as well. Please consult your school's own hazing policy. Often hazing is very broadly defined. Clearly a pledge should never be asked to do anything conflicting with his obligations to God, his country, or himself, nor should he be publicly embarrassed. No assigned duty should be for the personal benefit of an individual member. Drinking of any alcoholic beverage in any quantity should never even be implied as an act necessary really "to belong" to the Fraternity. Providing an alcoholic beverage to one underage is illegal in every state; furthermore, providing alcohol to one visibly intoxicated, regardless of age, is legal grounds for a lawsuit if that individual were to become involved in or were to cause an accident. A chapter should be able to justify every requirement made of a pledge to his parents, his spiritual adviser, the faculty, the Theta Tau Executive Council, and the district attorney.

Table 3-2

SUGGESTED WEEKLY STUDY ASSIGNMENTS

- Names of student members and pledges with chapter elective or appointive positions held by each.
- Information on the individual chapter (original name if any, date of establishment, chapter house location or mailing address, Theta Tau region, and Regional Director's name). Complete information about Alpha Chapter (original name, school, city, state), Founders' names, date of founding.
- The following information about Theta Tau: Definition, Purpose, Open Motto (including source), Membership Requirements, and Financial Obligations (including both national and local).
- Fraternities competitive with Theta Tau on campus, fields included by each. Name and field of each other professional fraternity on campus. Names of Theta Tau faculty members on campus.
- Name of the Grand Regent and Gear Editor, with the chapter of each, Past Grand Regents and Alumni Hall of Fame Laureates from the chapter. Fraternity colors, flower, gem, flag, coat of arms, and badge.
- The name (Greek letter), school, city, state, and chapter status (active or inactive), of Theta Tau chapters in the same region as the chapter.
- The Governance Structure of the fraternity. Parliamentary Procedure. The regular meeting schedule of the local alumni group.

3.4 Initiation

The purpose of this section is to provide suggestions which past experience has shown add to the effectiveness of the presentation of the Ritual.

Some of the ideals and principles of the Fraternity, and its secrets, are first presented to a new member through the initiation ceremony. To make these meaningful, the ceremony must be presented in a dignified, impressive manner. To do this, the initiation ceremony must be rehearsed in advance with all seven ritualistic officers participating. To enhance the presentation, each chapter should have the complement of equipment and regalia listed in the Ritual. It is recommended that the officers wear official Theta Tau robes. Dark business suits or equivalent should be worn by other members present. If a chapter does not have robes, it should begin by purchasing a single robe for the Regent, then eventually acquire the entire set. Information on price is available from the Central Office. Selected alumni may be asked to donate a robe apiece. Such a gift may be recognized by a nicely lettered label sewn in the back of the robe, in addition to mention in a newsletter, and a letter of thanks to the donor.

Prior to the date of initiation, the prospective initiates should be told the schedule of the day. Two hours should be allowed for the ceremony (including probable late start and subsequent review session). Schedule should include a banquet or dinner afterward. Initiates should wear a dark suit or equivalent; and to wear the insignia of no other organization on that day, but to bring the pledge insigne to be turned in prior to initiation. Initiation fee and badge cost must be paid by initiate prior to initiation.

Prior to the initiation day, initiates should be assigned a logical order for the initiation; and Roll Book Pages (obtained from the Central Office) should have all blanks except signature lines completed in advance (preferably by laser printer, or by typing, or carefully lettered in ink), including full name below initiate's signature line. Secret material in the Ritual must be decoded in advance. Short phrases should be memorized; longer phrases and interchanges between the Marshal and the Guards may be on cards or post it notes for use during rehearsal and initiation only, then destroyed. Although it should not be necessary to do so, all members should be reminded in advance to wear their badges to the ceremony.

The chapter room should be arranged as shown in the Ritual. The use of soft chairs for members should be avoided. Adequate ventilation should be provided, and the room temperature should be low enough at the start to allow for a rise during the ceremony when members and initiates are present. A badge must be borrowed in advance from a member for each initiate. These should be carefully arranged in a jewelry case so that it is known which member's badge is lent to which initiate. Just prior to the initiation, the Regent should remind the members present that there is no smoking during the ceremony; that the chapter replies in unison "aye," and "we all do," at specified times, and "amen" following the prayer and oath. He should further remind them that the officers will lead members in filing past to welcome initiates at the close of the ceremony. Guards should sit together inside the door during most of the ceremony, prevent interruptions, and admit latecomers only while initiates are not in the room. Telephone ringing should be prevented. With the initiates gathered in a nearby room, the Marshal should cover these points: 1) Each should silence their cell phone; 2) Initiates should be arranged in a column in initiation order; 3) Other insignia on coat or shirt should be removed; 4) Pledge pins should be collected.

If members for whom the Vice Regent cannot vouch are present, the procedures in the Ritual for "Visiting Members," must be followed. The meeting is opened without initiates being present. The usual opening prayer is not used. It should be noted that separate parts of the Ritual are provided for the cases of initiating student member(s), an honorary member, or the installation of a new chapter. Further, the arrangement of the initiate(s) during the oath varies with the number involved. The Centennial Edition (2011) of the Ritual provides detailed instruction and diagrams to assist each chapter in conducting a high quality ceremony.

Commented [X18]: this is just a rehashing of the content in the Ritual, which is a worthwhile endeavor because the Ritual is not always easily comprehensible. I recommend we either move this section as an overview to the Ritual revisions or make it sufficiently clear in the Ritual instructions/background that we do not this dumbed-down version.

Commented [YS19]: Perhaps some of this could be included in the regent's manual and then an expanded version of this included as an introduction to the initiation ceremony in the ritual. I just feel like it doesn't belong here. That being said, I think it is very important for us to communicate the importance of initiation to each of the chapter officers, as many tend to forget its significance and meaning. Perhaps we could do that in the general presentation to all officers and then include a bit of the nitty gritty stuff in the specific regent presentation.

Following the ceremony, after the new members are welcomed, the visitors and those vouching for them are to be noted in the meeting minutes. Those serving as Regent and Scribe during the ceremony sign the roll pages as witnesses. The Adviser and any current or past national officers present also sign the roll pages. Detailed instructions in the Ritual should be followed, including the holding of a closed conference during which the secrets and principles of the Fraternity are reviewed for the new initiates by the Regent. All cards, post-its, or other material showing used should be safely burned immediately.

Promptly after an initiation, the Treasurer submits to the Central Office a fully completed Initiation Report followed by payment of all initiation fees and badge costs via US Mail to the Central Office or via online payment. When all procedural details are complete, the Executive Director will place orders for shingles and jewelry ordered for the new initiates.

3.5 Professional Development

Commented [X20]: to PD Manual

In keeping with the purpose of Theta Tau, each chapter is expected to pursue a regular program of professional development. The type of professional development event or activity may vary greatly depending on the interests, need, and availability to the chapter. Refer to the Professional Development Manual for more detailed information. Some common types of PD events are:

- Resume writing workshop
- Job Interview Skills Seminar
- Dress for Success presentation
- Dining Etiquette
- Parliamentary Procedure Seminar
- Financial/Credit Management for Students and Young Professionals
- Plant/Industrial Tour
- Co-op presentation (based on a member's recent job experience)
- Lab/Project presentation(based on a student's current project)
- Fundamentals of Engineering (FE exam) preparation

The topics included, or at least their manner of development, should be professional in character and may be technical. Lean on university resources for many of the non-technical presentation examples noted above. Those who work in the career or student resources department of your college or university would be pleased to receive an invitation from your chapter to make presentation. It is good to publicize PD events and activities throughout the engineering student body as a means of generating interest in our professional engineering fraternity even if held outside normal recruitment periods.

Format and nature of topics should be varied throughout the school year. An opportunity should be provided for general discussion and/or questions during part of the event. Leaders for the activity might be Theta Tau alumni, student members, engineering faculty members, non-engineering faculty members, engineers or other professional persons (perhaps members of other professional fraternities) from the community, company interviewers (occasionally), members of the State Board of Engineering Examiners, NSPE officers, et al.

Some recommended sources of material either for selected programs or for series of coordinated programs are the ABET booklets A Professional Guide for Young Engineers by Brother William E. Wickenden, Delta '04. Document each professional development event, and attendance/participation by each member, for purposes of the Annual Report. Also, take photographs of the event for submission with the Annual Report.

3.5.1. Engineers Week

As part of its professional development program, each Theta Tau chapter is urged to sponsor some appropriate event during National Engineers Week in February of each year. Many campuses celebrate Engineers Week at a different time of the year in which case your chapter should participate during that time period instead. Engineers Week events should be open to engineering students and others; arrangements should be made early in the school year through the chapter Adviser and with the administration of the Engineering Division. If there is a student chapter of the State Society of Professional Engineers on campus, perhaps Theta Tau could co-sponsor an event with it. You can find detailed information, materials, and suggestions on the E-Week website.

A well-known engineer in your area, a member of the State Board of Engineering Examiners, or an officer of the Society of Professional Engineers speaking at a convocation on the subject of the year's theme, or some other professionally-oriented topic such as professional stature for engineers, or engineering ethics. Don't overlook a prominent Theta Tau alumnus if one is available. Likely the Adviser or Dean may have specific suggestions as to speaker or topic. Many chapters annually sponsor local Rube Goldberg™ Machine Contests often during Engineers Week. This event has brought a great deal of positive media attention to Theta Tau. If planned thoroughly, it can do the same for your chapter and university. Information on contest rules are available from the Rube Goldberg Website. Local contest winners are then invited to participate in the national RGMC contest traditionally held on the campus of Purdue University the weekend each spring with sizable cash prizes provided by corporate sponsors.

Do not let the opportunity of Engineers Week pass without bringing our profession favorably to the attention of those in your area — engineers and non-engineers alike. Make sure there are posters on campus and articles in campus newspapers regarding local activities during Engineers Week.

3.6 Public Relations

Commented [X21]: not sure what to do with this. Some chapters have a PR Chair, but in others these concerns fall to CorrSec or Regent. Thoughts?

Commented [YS22]: There's a lot of good information here. I think we should create a manual for PR Chair, and just state in the intro that many chapters have such duties be the responsibilities of a different executive board position.

Good fraternity public relations don't just happen. They result from the maintenance of a worthwhile program about which others are informed. Professional fraternities have a particular problem in making their unique identity known in contrast to social fraternities or greek letter honor societies. Theta Tau's **balanced program of Service, Professional Development, and Brotherhood** is adept at conveying the unique nature and mission of our organization. Be sure to share the good news of your events and activities in all three of these areas with your communities (students, faculty, administrators, neighbors, alumni, and friends). And, be sure that these events and activities reflect favorably on Theta Tau.

Each new engineering administrator or faculty member should be visited personally by a student member to a chapter event or activity and informed of significant chapter activities. In some tasteful way it should be determined if the new faculty member belongs to Theta Tau. Because the individual chapter represents the entire fraternity, the chapter's public relations are of utmost importance. Any fraternity is viewed by several segments of the public. The most important are those found in the city where the chapter is located: university-wide and engineering administrators, faculty members, students, other campus organizations, and local alumni.

The best way favorably to impress administrators and faculty members is to follow regulations, collectively and personally, and to provide the proper chapter atmosphere in which the value of academic achievement is recognized by members and pledges. Beyond this, each member and pledge should have an opportunity to get to know each administrator and faculty member personally while in school. Therefore, the chapter should invite these persons (and perhaps their families) to be the guests of the chapter at well-organized events. When appropriate, of course, they may be asked to speak, but it is also nice to have them sometimes simply as guests. Especially when the chapter maintains a house, it is desirable to invite representatives of neighboring or competitive fraternities to dinner occasionally. Of

course, having guests includes the responsibility of being a good host, and making the guest feel that you are genuinely interested in them before, during, and after dinner.

No amount of diversified effort on getting adequate publicity will take the place of a commendable balanced program of service, professional development, and brotherhood events – all of which make membership meaningful and which promotes group and individual participation and involvement. When some worthwhile group activity is undertaken, or when something involving the chapter is moderately newsworthy, officers should see that articles and photographs about it appear in the student newspaper, the student engineering magazine, the local city newspapers, the hometown newspapers of those members particularly involved, and (when appropriate) in the school's alumni magazine. Often, the school has a public relations office which will be of great help in getting articles cited. It is axiomatic that an editor cannot publish that which he doesn't know. One attribute of the engineer which is extolled in our Ritual is perseverance; this is often required in order to achieve the publicity deserved. The result of that perseverance is worth the effort.

Newspaper stories should be submitted in typed form, of course, and free of errors. Each should carry a headline. A short, balanced, two-line headline is used as a column head by most newspapers. In order to gain the greatest benefit from such an article, the headline should begin: "Theta Tau...and the article should begin: "Theta Tau, professional engineering fraternity,..." It should be written in journalistic style with the most important facts first, and include who, what, when, where, why, and how. Announcements, etc., should be attributed to someone by name and position. The news release should carry a release date at the top of page 1, along with the name, address, and telephone number of an individual who may be contacted for more information. Copy should be double spaced on one side of an 8.5 x 11 page. Multiple page articles should have the pages numbered, with the word "more" at the end of all but the last page which carries some "end mark," traditionally "###." Such an article must be timely to merit publication.

It will be no surprise to today's students that favorable publicity can be generated by the chapter and its members utilizing online resources such as facebook, twitter, and more. A quick post with a photo, including as many of the questions noted in the paragraph above (who, what, where, when, why), tweeted, tagged, retweeted, etc., by individual members can generate its own momentum. In the same way, though, unfavorable publicity can just as easily spread so be deliberate and conscious of the image and message you convey via the internet.

For significant Fraternity events such as special anniversary celebrations, Regional Conferences, Conventions, etc., the host chapter should make every effort to obtain publicity in campus and local city newspapers prior to, during, and following the event in order to maximize the coverage. An important event is sometimes good material for radio or television coverage, also. A local Rube Goldberg Machine Contest is a great way to attract local media attention to your chapter and your university with the possibility of nation-wide attention if your machine wins the national contest.

3.7 Alumni Relations

Commented [X23]: incorporate with CorrSec Manual?

Commented [YS24]: Yess.

Attendance of an alumnus at chapter events depends upon several factors. First, one must receive a specific invitation well in advance of the event. The event should be scheduled at a time likely to be convenient for the alumnus to be on campus, and it should be one that the alum can expect to enjoy. Alumni always recall (favorably or otherwise) previous chapter events attended, and the importance of good alumni relations cannot be overemphasized.

3.7.1. Invitations

The chapter's alumni, nearby alumni of other chapters, the Regional Director, and other nearby national officers should be urged to attend each of the events below through invitations received more than two

full weeks before the date. Date, time, place, and event should be detailed. Through the envelope address, or otherwise, it should be made clear if the alumnus alone is being invited to the event or if his spouse (and children, perhaps) are also invited. Whether advance reservations are necessary or requested, or not expected, should also be make clear. In addition to being invited by mail, each Theta Tau faculty member should be visited personally and invited by a student member; and each other local alumnus should at least be telephoned by a student member more than a week before the date set. A convenient way to invite large numbers of alumni is through a newsletter, mailed at least a month before the event.

Naturally, many chapters can now communicate with some segment of its alumni population electronically via email, tweet, or facebook posting. While this is a convenient and cost-effective means of communication, it should be remembered that it does not reach all segments of your alumni population. Care should also be taken to ensure that electronic communications are created with the same level or care, detail, and professionalism as a print invitation.

3.7.2. Founders Day (October 15)

It is a fixed custom and tradition of this Fraternity, which all members are to observe, that every chapter, alumni association, or unorganized groups of alumni living in the same vicinity observe Founders Day by some suitable gathering on or about October 15. Spring planning is necessary to have a good event so soon after the fall term begins.

3.7.3. Chapter's Anniversary Date

This is another event which should be appropriately observed each year with alumni participation assured through invitations issued well in advance.

3.7.4. Initiation Day

This is a good time to invite nearby alumni (and distant alumni who are related to a new initiate) to visit the chapter. Nearby national officers should also be invited.

3.7.5. Football Season

Football season (and especially each school's homecoming) provides an excellent opportunity to renew friendships with alumni and their families. Buffet meals, and coffee and doughnuts served before/after the games are good ways to welcome back an indefinite number of alumni.

3.7.6. Newsletters, Websites, and online communications

Chapter newsletters should be mailed by each chapter at least once a year (and preferably more often) to all its alumni (including honorary members), other chapters, alumni organizations, national officers, and Past Grand Regents. These may be beautifully printed as done regularly by some chapters, or they may be prepared more inexpensively as some chapters are doing. Naturally, to be of any value at all, they must be legible. It is important that the newsletter be prepared primarily to be of interest to the chapter's own alumni, of all ages, young and old. A common fault of chapter newsletters is that they contain news in which only a very recent alumnus is interested. News stories should be oriented so that they will be of interest to readers regardless of age. Emphasis should be given to chapter accomplishments and honors to individuals, and especially news about the alumni themselves. Foul language or a politically strident article should never appear in a newsletter; your readership is diverse and many may find remarks offensive. Each issue should be dated (month or season and year). Refer to the Style Guide for design and use suggestions.

Perhaps the greatest error made is that student members feel compelled to report as humorous events such as weddings, or that recent parties, water outings, or walk outs were the greatest ever. The error is not so much in reporting these things, but in giving a distorted view of their importance in comparison to more worthwhile activities which are likely to stimulate pride in the chapter. The newsletter's focus

should instead reflect our balanced program of service, professional development, and brotherhood events. A good way to give a newsletter proper perspective is to submit the copy to the Adviser or other interested mature alumnus for a quick review prior to publication. The purpose is not to have it censored, but to get the comments of a typical alumnus and to see if the message is clear. Alumni often react unfavorably without ever conveying their thoughts to the chapter. The newsletter should put the chapter's best foot forward.

This applies equally to your chapter website, facebook page, twitter postings, and even an individual member's online presence that is linked to your chapter's sites (since the student member's site reflects on the chapter). A 2010 study indicated that over 45% of employers consider an applicant's online social media behaviors before hiring. That percentage will only increase in future years. Not surprisingly, many chapters create a newsletter in electronic form for emailing to alumni and/or posting on their website. An electronic version (with full color and many images) can often look better than a print version in black and white, but these electronic versions may not reach alumni of all ages.

3.7.7. Hospitality

All student members share a responsibility for making the visiting alumnus (and their family) feel most welcome. This takes prior planning, effort, and time on the day itself, before and after the event. It also pays big dividends. (See the "Hospitality" section of the Membership Manual.) Without exception, each member and pledge should introduce himself to each visitor as early as possible. If a large number is involved, a name tag should be provided for each one present.

3.7.8. Fundraising

Some chapters use the newsletter effectively as a medium for soliciting financial support from their alumni. Careful planning should precede such an effort. Requests should state at least generally the purpose for which the money will be used, and roughly the extent of the need. Contributions should never be requested to pay for chapter activities, but only for the purchase of items of lasting value or to improve chapter property. Contributions directly to a professional fraternity chapter should not be inaccurately described as being income tax deductible. They are not.

A general request for gifts to a headquarters fund, not yet established, to be administered by student members, is sure to evoke little response. A well-organized, well planned, and fully developed program involving alumnus leadership is necessary for obtaining significant gifts for a headquarters fund. A study of the experiences of other chapters should be made before embarking on such a program. A Fundraising Manual is available from our website to assist your fundraising efforts.

Some chapters have an on-going program through which regular annual gifts are solicited for chapter improvements. The oldest such program is that of Zeta Cogs, originated by Zeta Chapter in l952. Those who become "Zeta Cogs" contribute annually. This is transferred by the chapter to the house corporation to finance major house improvements, purchase of furnishings, etc. When well administered, such a program will include imprinted cards and addressed return envelopes enclosed with the newsletter, prompt notes of thanks to contributors, wallet-size cards acknowledging their gifts, listing of donors' names on a framed certificate prepared annually and displayed in the chapter headquarters, and listing of their names in the next newsletter together with an article citing improvements the fund has made possible since the last issue. Such a long-established program might run as high as l5% participation by those contacted.

Annually, every alumnus is contacted by the Educational Foundation and invited to contribute to its progress through a gift. These gifts support the Foundation's scholarships and leadership academy for the benefit of Theta Tau's student members. You can find out more on the Foundation's webpage.

3.8 Library

Each chapter headquarters should include a library of selected books of interest and value to its student members. The library should not be just a depository for discarded textbooks, but a worthwhile collection of reference books, general interest books, books on professional topics, books authored by Theta Tau members, etc.

Regular acquisition of volumes can be made if this is a budgeted item of chapter expense. In addition, student and alumnus members may be asked to contribute worthwhile books. Such gifts should be recognized by a nicely prepared bookplate in each such volume, as well as by a letter of thanks to the donor. The library should include a complete file of The Gear of Theta Tau dating back to the chapter's installation. Likely, the chapter should subscribe to other selected magazines of general interest, as well as to professional engineering journals.

Commented [X25]: not sure what to do with this, could be appropriate for Regent, Treasurer, Scribe Manuals, or perhaps made a Vice Regent task!

Commented [YS26]: A library of books is nice, if members choose to donate their books to it. Perhaps it would fall to the role of Historian? Also this brings up the question of whether we want to (at the national level) mention anything about study files or test banks or hint that chapter could/should do things like that.

3.9 Loans for Chapters

Members of the Executive Council, as trustees for the Fraternity, have made available the assets of the Founders' Memorial Fund (contributed by members) and a part of the General Funds of the Fraternity for low-interest loans to organized chapter alumni corporations for the purpose of acquiring, remodeling, and equipping chapter headquarters. It is anticipated that a loan from the national Fraternity will be used to complete, not to initiate, a financial program. The bulk of the equity needed must come from a headquarters fund built with obligatory payments by chapter members (see paragraph 2.4.7). The maximum available for loan to a given corporation is limited.

Commented [X27]: to Treasurer Manual?

Commented [YS28]: Definitely.

3.10 Pictures and Scrapbooks

A photographic record (hardcopy and electronic) of chapter membership should be maintained through annual group pictures or composites of individual pictures well-framed and appropriately identified and dated. Having these on display in the chapter headquarters and on the chapter's webpage will be of great interest to visiting alumnus and prospective new member.

Each chapter should maintain a scrapbook reflecting group and individual activities of its members. Such a record is of great value in keeping a permanent history of the chapter. A scrapbook, well kept and discreetly used, can be invaluable in telling or reviewing the chapter's story with guests, faculty members, and visitors of all ages.

Although the written word is necessary to a scrapbook, photographs are most important. Pictures of activities as well as of posed groups will serve to keep memories fresh for all who review the scrapbook. However, to be worthwhile, all pictures need to be captioned, dated, and the individuals in each photo identified. Clippings from campus and city newspapers, and from magazines, will serve to record noteworthy group and individual achievements. Naturally, these should be identified as to source and date, and explanatory material included where needed. If such a record is maintained up-to-date, it will tend to show the need for continual effort to keep the Fraternity's name favorably before others, through articles in periodicals.

Photographs of chapter headquarters, community service events, professional development activities, brotherhood events, initiation classes, etc. should be included, along with a copy of every issue of any chapter publication such as newsletter, rushing leaflet, etc. Thank you and congratulatory messages received by the chapter from time to time should be included with explanation. An effort should be made to include in the scrapbook a record showing all aspects of our balanced program, and also include

Commented [X29]: if no Historian Manual, incorporate this section into Scribe/CorrSec Manuals?

Commented [YS30]: I was thinking we would include a historian manual, and do the same thing we would do with the PR chair, state that if your chapter doesn't have this position these duties may be assigned do a different position.

activities on the national level. Conventions, Leadership Academies, and Regional Conference pictures including members of the chapter should be included.

If a chapter doesn't keep a scrapbook which is up-to-date, it will never have one unless the Corresponding Secretary or another student member is specifically assigned this project, and called upon to report its status in chapter meetings at regular intervals. A year or two worth of images is enough to make a great presentable product to visitors, and once started, it is hoped that others would continue updating the tradition and historical record of the chapter's activities and events.

3.11 Extension/Expansion

Commented [X31]: to Recruitment Manual?

Commented [YS32]: I don't think it's particularly applicable there, it might fit better into the general chapter officer's manual as a smaller note.

The student member, actively involved in his chapter's program, and well informed about his Fraternity, is the best possible one to promote the expansion of Theta Tau through the establishment of new colonies and chapters. A nearby school with adequate enrollment and ABET accreditation where friends are enrolled is an obvious choice. Further, during the summer there may be opportunities to meet suitable students from other accredited schools without Theta Tau chapters. If an opportunity presents itself, request assistance from the Central Office. The Executive Director should be notified of any school which you think should be targeted for extension so efforts may be coordinated. The blue manual The Way to Theta Tau is designed to guide one providing leadership in the extension effort at a targeted school.

3.12 Summer Activities

Commented [YS33]: This whole thing could additionally be incorporated into the officer's calendar we have, as well as mentioned in the general officers presentation. Planning ahead during the summer is always a good thing.

Membership in Theta Tau continues through the summer, and so can Fraternity activities which many members would find pleasant under a relatively relaxed summer schedule. Many of these can be of great value to the Fraternity. Here are some suggestions:

Commented [X34]: to Recruitment Manual

Recruitment — Contact prospective membership candidates (especially students who may be new to your engineering school in the fall) during the summer personally, by letter, or electronically. This will pay off with more good pledges in the fall. Copies of promotional materials are available from the Central Office to aid you in telling others of Theta Tau's merits.

Commented [X35]: to Regent/Chairs Manuals

Schedule— Chapter activities for the fall (and perhaps beyond) should be scheduled as firmly as possible during the summer to avoid problems later.

Commented [X36]: toCorrSec Manual

Alumni file— Addresses from the Central Office and other sources may be used to make the chapter's file more complete and up-to-date.

Commented [X37]: toCorrSec Manual

Founders' Day— Plans for an event to commemorate October l5 appropriately should be made during the summer, and invitations issued to alumni as soon as classes begin in the fall.

Commented [X38]: to Regent/Scribe Manual

Chapter supplies— Inventory taken for the Annual Report points up materials in short supply which should be ordered from the Central Office during the summer for delivery during the first week of classes.

Commented [X39]: toCorrSec Manual

Summer newsletter— A brief newsletter containing a short paragraph about each one's summer activities can be of great interest, especially to those far from the chapter.

Commented [X40]: to Social Manual

Social events— At least once during the summer a social activity for those nearby is a desirable event which could be announced in detail in the summer newsletter.

3.13 The Greek-Letter System

Commented [X41]: dunno what to do with this

Commented [YS42]: I would axe it.

As members of a national professional engineering fraternity, we are participants in the Greek letter system. On a national level, Theta Tau belongs to the Professional Fraternity Association. The Fraternity was a founding member of this organization's predecessor, the Professional Interfraternity Conference, in 1928. These national ties with other Greek organizations alone are not enough, however.

Theta Tau is best served when the Greek letter system generally is advanced. Therefore, on every campus, a spirit of friendly cooperation should prevail not only among Theta Tau and its competitors and other professional fraternities, but also among all Greek letter groups. Sometimes this may be accomplished partly through an interfraternity organization on the campus; often it must be wholly on an informal basis.

The chapter should consider participation in those greek umbrella groups (IFC, PFC, Greek Council, etc.) to which it can positive contribute and from which it can derive benefit. An interfraternity organization on campus can be of benefit to Theta Tau by collectively presenting the fraternity story to membership candidates and representing the fraternity community to the faculty and administration. The chapter should be alert to the most common fault/error exhibited by such interfraternity campus organizations: unnecessarily regulating chapter activities such as recruitment. If excessive regulation of recruitment is a characteristic of your college greek umbrella groups, it is likely unhelpful for your chapter to join them.

3.14 Correspondence, Letters, and other communications

Commented [X43]: to P&P with references in Regent and CorrSec Manuals?

Commented [YS44]: And additionally the scribe's manual. I think we can just mention the main points of this in each of these manuals and also include the reference without going too much in depth (3-4 bullet points)

What we write represents us to the vast number of members and others. They may never see us personally, and therefore, must base their appraisal of us on our letters to them. Spelling errors reflect carelessness which should not characterize an engineer's work. Misspelling persons' names is especially undesirable. Standard form for a business letter requires the mailing address of sender (if these are not part of the printed letterhead), and the complete date usually above and toward the right of the body of the letter. An inside address should be included above the salutation. A letter between members who are not on a first name basis should bear a salutation in the form, "Dear Brother Lastname:." A standard complimentary close should be used except between Theta Tau members who should sign their letters and emails "In H and T,." The signature of the sender handwritten in ink should always appear below the complimentary close. Letters, completed forms, and clippings must be sent as first class mail; however, the use of registered, certified, or overnight mail for sending such items involves an unnecessary expense.

Follow the above guidance for letters whenever possible when drafting email or text messages. Since email has become a common form of business communication, it is unwise to use text abbreviations/shorthand in email messages. Never assume that the reader will know you based on your email address. Include a salutation at the start of the message (even if just a first name) and a closing at the end (even if just an email footer). Be alert to whether you are responding to an individual or a multiple persons. If a sensitive topic has been raised, do not hesitate to respond with a phone call instead of another email message. Never include Theta Tau Ritual secrets or signs in a message, attachment, or photo/image.

4. Laws and Customs of Theta Tau

Commented [X45]: to P&P en masse

4.1 Alumnus Status

When, for any reason, a student member ceases to be enrolled at the institution where he was initiated into Theta Tau, he is classified as an alumnus as soon as this fact is reported to the Central Office on a Membership Status Change Report in the NCR form. One may, of course, resume student member status upon enrolling again at the same school, or upon enrolling at another school with a Theta Tau Chapter and officially transferring his membership to that chapter. (See paragraph 4.13 of this Manual.)

It is expected that each alumnus will remain active in Fraternity affairs. Therefore, members still enrolled (and not prematurely granted alumnus status), should be called "student members" (not "actives") in contrasting them to alumni.

Alumnus status may be granted to an undergraduate member who is still enrolled (regardless of major) at the institution where he was initiated only by approval of the Executive Director via the manner subscribed below. These status change options are available only to those free of debt to their respective chapter. An undergraduate member must request alumnus status first via four-fifths approval of the chapter, concurrence of an Adviser, and then approval of the Executive Director via the Premature Alumnus Status Request Form. Chapter and Adviser should provide all information required on the form for requesting alumnus status for an undergraduate in presenting the matter for the final consideration. Even if the chapter and/or Adviser reject this request, the chapter is obliged to forward it to the Central Office (with the box for rejection indicated). A graduate student may be granted Alumnus Status as a Graduate Student by majority vote of his chapter without necessity for any other approval; the form must of course be submitted to the Central Office for the request to be effectuated. Finally, those who have been student members of Theta Tau for 4 full years may request Premature Alumnus Status as a 4 year Member also without further approvals, but still requiring submission of the request form to the Central Office.

No member currently enrolled may be permitted to achieve alumnus status unless he has been a member for at least six months as an undergraduate or graduate student. Those having been granted alumnus status may resume student member status only with four-fifths approval of the chapter, approval of the Adviser, and approval of the Executive Director.

4.2 Awards

At each Convention, the Erich J. Schrader Award, named for Theta Tau's principal Founder, is presented to the chapter of the Fraternity judged most outstanding during the previous biennium. The selection is based on information contained in its Annual Report filed with the Central Office by May 1 of each year. Chapters which have reached an outstanding level of operation based on this report are presented with the Outstanding Chapter Performance Award that year. The Founders' Award is presented at each Convention to that chapter which has shown the greatest improvement over the previous biennium.

Since 1941, the Fraternity has conferred upon a student member the designation as Outstanding Delegate at each Conference and Convention, a selection made by the student Delegates to that meeting. From among those honored by their respective chapters, the national Fraternity annually names one member the Outstanding Student Member of the Fraternity.

Distinguished alumni of Theta Tau are inducted into the Hall of Fame, established by the 1986 Convention, at each national meeting. Nominations for this award may be made by a chapter, alumni association, and the Executive Council, but no more than five may be inducted in any year. Alumni many times are never thought of except when something is needed from them. What better way to thank alumni for their help and their contributions to this Fraternity and/or their professions than to nominate them for consideration for this honor. Every chapter knows of an alumnus who deserves the honor of being nominated.

There are other awards too numerous to mention for items such as Best Photo, Website, Newsletter, Service Project, Professional Development Project, Brotherhood Event, chapter growth, chapter performance presented each year. Nominations are made by chapters via an Awards Packet due each spring.

4.3 Chapter Bylaws

Each chapter must have Bylaws not inconsistent with the Theta Tau Constitution and Bylaws. A copy of the chapter's bylaws should be on file with the Central Office. The chapter bylaws should include a statement of duties of each officer in addition to those covered in the Theta Tau Constitution and Bylaws, and specifications of the term of office for each chapter officer. Chapter dues and fees should also be specified. Standing committees should be covered as to composition, method of appointment, and duties.

4.4 Chapter Size

Size of chapter is limited as per the Constitution, Article V, Section 3: "No chapter shall have more than 70 student members at any time. However, the Grand Regent shall have the power to waive this law temporarily when application is made in writing by the chapter. Furthermore, the Executive Council shall have the power to grant permission to exceed this limit for an extended period with biennial review when application is made in writing by the chapter." Obviously, a chapter must receive such permission in advance of a proposed initiation which might take it over the limit, and regardless of how far or how long.

Despite this limit, chapters are advised that the limit of 70 is not a number that they should fear to approach. **The spirit of brotherhood is stronger, the fraternal experience more significant, and the benefits of membership in Theta Tau more distinct, with 40 or more brothers in a chapter than with 20 or so.** Put another way: "Success has many fathers, and failure is an orphan." Or, perhaps you heard the saying: "Everyone wants to be part of a successful organization." No matter how you say it, they convey the same message and meaning. The old adage that we want "quality over quantity" is generally used as an excuse for failure. In truth, "**quantity breeds quality"** (not the other way around). Having more members and more candidates for membership gives each chapter the ability to be more selective whereas a small chapter with few recruits virtually always feels obliged to pin everyone who walks thru the front door.

The Fraternity has created a chapter size target for each chapter based on various objective or historical criteria. A chapter reaching its size target is awarded with certificate and check for $250. There are other awards for chapters over 40 members and those growing by at least 20%.

4.5 Discipline

A chapter shall have the power to investigate the conduct of any member whenever it sees fit. For breaking any of the Laws and Customs of Theta Tau, or in any way acting in an unfraternal manner in violation of the oath of membership, a member may be suspended from membership by a chapter after having been tried and found guilty in accord with the provisions detailed in Theta Tau Bylaws, Chapter VI. Upon suspending a member, the chapter shall immediately notify the Central Office. The Executive Council may expel a student member after suitable investigation. A suspended member has no Theta Tau rights except the right of appeal. Please refer to the Disciplinary Action Checklist to ensure adherence to our laws in this regard.

It is far better to prevent a potential problem through early counselling with the member by the officers and Adviser than to have to try to resolve it later through disciplinary action. Addressing these issues sooner rather than later can more successfully lead to and understanding and agreement with the member. In contrast, procrastination more often leads to suspension and expulsion.

4.6 Founders Day

Each member is expected to join with his own chapter or with nearby alumni to observe Founders Day with a suitable event held on or about October 15 each year. When this is impossible, he should write a letter to reach his chapter before October 15 each year.

4.7 Inactive Status

A student member pursuing a cooperative program of education and leaving the locale of his campus for a period of industrial training, study abroad, or called to military duty may be declared temporarily inactive by his chapter for this period. The Co-op worksheet in the NCR form should be filed with the Central Office promptly at the start of the term. Otherwise, the Treasurer must include with the semiannual dues report a brief statement certifying chapter action granting inactive status and explaining fractional dues payment. "Inactive" should not be used to describe one who has left school or one granted alumnus status prematurely in accord with our Laws. (See "Alumnus Status" in paragraph 4.1 of this Manual.)

4.8 Installation of Officers

The ceremony for the installation of chapter officers, presented in the Ritual, should be followed whenever a chapter officer has been elected. The installation should usually be held at the meeting next following the election.

4.9 Mourning

In honor of a deceased member, the official badge may be draped by pinning it through a square of black ribbon slightly larger than the badge, arranged with the diagonals of the square along the spokes of the gear wheel. A badge replica is draped by tying a narrow black ribbon across the intersection of the hammer and tongs. For a student or alumnus member, the chapter to which he belonged should wear mourning for 30 days; and for an honorary member, 60 days. For a member or former member of the Executive Council, the chapter to which he belonged should wear mourning for 60 days; and all other chapters, 30 days. Observance of this custom is optional.

With the publication of the Centennial (2011) edition of the Ritual, a Chapter Memorial Service was included. This ceremony can be used at the start of the biennium using the list of deceased members distributed in the Convention Memorial Service program. It may also be used anytime a chapter loses one of its members.

4.10 National Fraternity Events

Theta Tau holds a national event annually. The Leadership Academy, held in odd-numbered years, is sponsored by the Educational Foundation and is focused on the personal and leadership development of the individual. The National Convention, held in even-numbered years, elects the Executive Council, celebrates the Fraternity's successes, involves other legislation of national importance, includes activities of interest to alumni, and offers programming of value for chapters, officers, and other members. Both events provide opportunities for chapters and alumni groups to be represented officially and to guide the Fraternity's progress. Every chapter should encourage as many members as practical to attend these national events. Partial registration expenses of the Delegate and Alternate from each chapter are paid by the national Fraternity.

Regional Conferences are organized at least annually in each Theta Tau Region by a host chapter and the Regional Directors. These programs are often much more brief, but provide an opportunity for members to share ideas and experiences and to receive training, education, support from Theta Tau national officers and/or outside professional speakers. Contact your Regional Director for information on upcoming regional events.

Chapter Installations and Colony Certification Ceremonies are historic Fraternity events at which every nearby chapter should be represented by a sizable delegation.

Informal social and athletic activities involving chapters located in the same area should be arranged whenever possible, and scheduled well in advance.

4.11 Pledge Pinning Ceremony

The Pledging Ceremony in the Ritual was adopted by the Twenty-Fifth Biennial Convention in 1964 is to be used by all chapters in officially inaugurating each one's pledgeship period. The ceremony is performed as part of the closing ceremony to a regular meeting.

4.12 Reading Our Laws

Theta Tau Constitution, Article VIII, Section 4, states that at least one Article of the Constitution shall be read aloud at each regular "closed" chapter meeting. Each Regent is strongly urged to outline and to follow a chapter meeting reading program which will include the reading of the entire Theta Tau Constitution, Theta Tau Bylaws, and the Chapter Bylaws during the period of one school year.

4.13 Transfer of Membership

Transfer of membership between chapters may be achieved in accord with Bylaws, Chapter II, Part F, which should be reviewed in its entirety whenever a member is considering transfer of membership. The basic procedure may be summarized in this way: To transfer membership, a member must be in good standing (free of debt to the Fraternity and its units, not delinquent with respect to duties, and not under suspension or pending suspension), eligible for membership in the chapter with which he wishes to affiliate, and elected to membership by it. More than two dissenting votes will reject the member from affiliate membership. The member should then write his own chapter requesting a letter of transfer. Similarly, the chapter with which he wishes to affiliate should write his chapter notifying it of his election as affiliate member. If the member's chapter votes its consent, its Scribe should notify the other chapter. Copy of this letter must be sent to the Executive Director. The chapter's action should be recorded in its minutes and on the Roll Page of the member. A transfer member is not assigned a new roll number by the new chapter. Later, after he leaves school, each chapter should included him among its alumni.

4.14 Visiting Members

A member may vouch for another only if he has attended his initiation or sat in a closed Theta Tau meeting with him. Whenever a member for whom the Vice Regent cannot vouch wishes to attend a closed meeting, it is necessary that the situation be handled strictly in accord with the Ritual section entitled "Visiting Members." If no member present can vouch for the visitor's membership (in accord with the Ritual), then he must be able to prove his membership in Theta Tau by properly answering questions put to him by an examination committee before the meeting begins. This procedure should be followed even when the visitor for whom no one can vouch is a national officer. As a part of the opening ceremony for

the meeting, the visitor is asked to record his name, etc., in the minutes. The Scribe should be sure this is done immediately following the meeting, if it was not done before the meeting convened. The visitor should be in invited to speak before the meeting closes.

It is appropriate for one visiting another chapter to bring a small gift for the chapter or to send a thank-you note to the chapter following the visit. Over the years, some student and alumnus members have developed a habit of "borrowing" things from other chapters. This may seem harmless enough, but it too quickly leads to problems. Some think that this practice builds brotherhood, encourages visits to other chapters, and that no ill feelings have resulted. They are wrong. Overwhelmingly, this is just not the case. The evidence is clear that over time it degenerates into misdeeds, accusations, vandalism, hard feelings, and bad blood. Instead of building brotherhood, it builds resentment; instead of encouraging visits to other chapters, it leads to breaking and entering; eventually it results in a member being injured or worse. These words mean a great deal to us so refrain from this so-called "borrowing" activity at all times and actively prevent others from doing so as well: "In a machine, if one gear is out of sync with another, it stops the machine.... if a chapter is out of sync with another, it disturbs the harmony that exists among us."

4.14.1. Official Chapter Visit

A national officer, or an alumnus appointed by the Grand Regent, may make an informal visit to a chapter, or an official visit. In the latter case, the visitor will want to view the chapter records, properties, and supplies, as well as to discuss the chapter's operation with the officers and other interested members. Included in an official visit should be a closed chapter meeting, and separate appointments to see the Adviser, Engineering Dean, and the administrative officer most closely associated with fraternities at the school. The purpose of an Official Visit is to comply with our constitutional requirement to visit each chapter each biennium, but as importantly to counsel, mentor, and support chapters in their efforts toward lasting success. Sometimes, the visitor will bring to your attention trends or concerns we have become aware of on other campuses. Each national officer is a volunteer who donates time and talent because of the positive difference Theta Tau has made in their lives. They simply want your chapter to continue making that positive difference now and in the future.

When a chapter is being visited by a national officer, or by a distinguished alumnus, it is good practice to see that the visitor is met upon arrival in the city, and provided with transportation as needed during his stay and when departing from the city. Since the visitor will probably have with him ample work to keep him busy, and would also welcome an opportunity just to relax, it is not necessary or desirable for the chapter to feel that it must fill every minute of his visit. However, invitations (which he might freely accept or decline) to attend non Theta Tau events of special interest scheduled nearby, or to utilize campus recreational facilities, may properly be extended to the visitor.

Each member and pledge should introduce himself when he first sees the visitor. If he is not wearing an identifying insigne, it is desirable that he clarify his status (pledge, member, or office holder) to a visiting member when introduced. The use of lapel name cards is a great help to a visitor.

4.15 Employment with the Fraternity

For the member interested in serving his Fraternity while working at an interesting job paying limited salary, there is occasionally the opportunity of employment by the Fraternity in the Central Office, full- or part-time, for a student member or recent graduate, perhaps during a co-op period or a term away from school. Any member interested is asked to discuss the matter with the Executive Director.

5. Closing & Appendix

We hope you find this Manual helpful in fulfilling the duties of your elected or appointed office, as well as beneficial in providing an overview of some chapter operations. No Manual can completely answer all questions that may arise as a given chapter. Feel free to contact your Regional Director, Advisers, or the Central Office if you are in need of further assistance. In addition, the most valuable publication for students to use in noting upcoming duties, events, suggestions, and opportunities is the Velocitas electronic newsletter. The Velocitas is published during the regular school year, emailed to all student members in html format, and posted on the Publications section of the Theta Tau Website.

For simplicity's sake, we have provided links to the most commonly used forms throughout. Slightly different versions of the NCR and Annual Report forms are available for schools on quarters rather than the version for those on semesters. A list for Quarter Schools and Semester schools appears here:

Quarter System Schools:
NCR form for schools on Quarters
Annual Report for schools on Quarters

Semester System Schools:
NCR form for schools on Semesters
Annual Report for schools on Semesters

Nearly all of the documents referenced in this Manual are available on the Theta Tau website. Some common sections of the site you will find helpful include:

Alumni Forms and Alumni-related Links
Chapter Forms, Colony Forms, Officer Forms
Frequently used Forms
Graphics
News & Events
Online Store & Payment Options
Manuals
Publications
Templates
Velocitas

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