

The Pi Tau Sigma Chapter Manual 2004

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I. Purpose of Chapter Guide

The purpose of this Chapter Guide is to assist in the functioning and continuity of operation of a Pi Tau Sigma student chapter from semester-to-semester. It is intended to provide a general overview and pertinent information directed to the chapter advisor and new student officers regarding their duties and responsibilities. It also provides helpful information.

Hopefully, this Chapter Guide will serve to make each Pi Tau Sigma student chapter a stronger organization, providing for the needs of the student members and the respective mechanical engineering departments.

II. Functions of an Honor Society

The functions of an honor society are not social as in the case of general college fraternities and sororities. Social activities of honor societies are incidental and occasional, usually in connection with major activities. The following functions are properly served by an honor society:

- To confer distinction for high achievement in undergraduate, graduate, and professional studies, in student leadership, and in various fields of research.
- To enhance the profession by fostering high ideals and by promoting the mutual professional welfare of members
- To foster the spirit of liberal culture.
- To stimulate and encourage mental development.
- To stand for freedom of mind and spirit and for democracy of learning.
- To provide spiritual and intellectual leadership.
- To preserve valuable traditions and customs.
- To associate outstanding leaders in mutual understanding for the advancement of society in the art of democratic living.
- To stimulate worthy attitudes for the improvement of the general welfare of the institution.
- To impose upon members high citizenship responsibilities and to emphasize deeper study and discussion of the American tradition - its characteristics, ideals, and possibilities.

III. Preamble of the Constitution of the Pi Tau Sigma Honor Society

In order to establish a closer bond of fellowship which will result in mutual benefit to those men and women in the study and in the profession of mechanical engineering, who by their academic or practical achievements, manifest a real interest and marked ability in their chosen work, this

constitution of the International Pi Tau Sigma Mechanical Engineering Honor Society was established.

IV. Object of the Pi Tau Sigma Honor Society

Article II of the Pi Tau Sigma Constitution: The object of this organization shall be to encourage and recognize superior scholarship, to foster the high ideals of the engineering profession, to stimulate interest in coordinate departmental activities, to promote the mutual professional welfare of its members, and to develop in students of mechanical engineering the attributes necessary for effective leadership and the taking up the responsibilities of a citizen living in a democracy.

V. Government of Chapters

Chapter government is covered in Article VII of the Pi Tau Sigma Constitution and Article VI of the Pi Tau Sigma Bylaws. Both of these documents are included in this guide. Refer to these sections for details. Some of the information is repeated in other sections herein for convenience of reference.

VI. Chapter Bylaws

Each chapter is encouraged to develop a set of bylaws germane to local operating procedures and regulations. Information unique to university regulations could be included. Some universities may require such. Local bylaws are permitted and encouraged. They may not permit any lowering of requirements of the Pi Tau Sigma Constitution and Bylaws. More stringent requirements may be established if it is in the best interest of the local chapter. If there is a conflict between local and parent organization, the parent organization rules apply.

VII. Chapter Officers

Article VII of the Pi Tau Sigma Constitution pertains to chapter government. It states that there shall be six officers of a student chapter. These include president, vice-president, recording secretary, corresponding secretary, treasurer, and faculty advisor. Article VI of the Pi Tau Sigma Bylaws should be consulted for detailed descriptions of the duties of these officers. It cannot be emphasized enough that diligence and cooperation amongst the officers is essential to having an active and productive chapter.

In addition to the officer duties outlined in the Bylaws, the following suggestions are provided for the delegation of responsibilities to the chapter officers. It should be kept in mind that a chapter should follow the guidelines of the Pi Tau Sigma Constitution and Bylaws but should

also be setup to provide a chapter with an efficient delegation of responsibilities for routine business.

1. *President:* The president should provide leadership in the student chapter by presiding over the chapter meetings as well as in delegating tasks to the other student officers. He or she should be in regular contact with the chapter advisor regarding chapter activities and the needs of the parent or chapter organization. He or she should also encourage sufficient communication with the other officers to ensure that chapter needs are being met.

2. *Vice-President:* The vice-president should work closely with the pledges for the initiation process. He or she should oversee chapter traditions with regard to pledges. He is also to assist the president in the initiation ceremony. The vice-president should also communicate regularly with the faculty advisor and be active in the processing of new members.

3. *Recording Secretary:* The recording secretary should be responsible for posting notices for upcoming meetings as well as for recording the minutes of the chapter meetings. He or she should also prepare the annual chapter report for submission to the International Pi Tau Sigma Office.

4. *Corresponding Secretary:* The corresponding secretary should be responsible for reserving the meeting rooms for the chapter meetings as well for any special events such as picnics, pizza parties, etc. He or she should also be responsible to invite guest speakers for the chapter general meetings.

5. *Treasurer:* The treasurer is responsible to collect or to assist the advisor in the collection of membership dues and in dealing with other chapter financial matters. He or she should also be responsible to secure refreshments for the general meetings or picnics.

6. *Faculty Advisor:* The faculty advisor should be active in assisting the student officers in chapter decisions and processes. He or she should retain the permanent records and initiation rituals for the chapter. The faculty advisor may also be active in the selection process for the initiation of new members as described in the Constitution.

A chapter may have additional offices and officers to assist in specific chapter activities. Any additional officers must be authorized by formal chapter action. An example of such an office is that of a Scholarship Chairman who is responsible for the collection and appropriation of chapter scholarship funds. Some schools have a joint council of representatives from student organizations. A chapter may need to elect a representative for such councils.

VIII. Chapter Advisor

The chapter advisor is a key person to effective and efficient chapter operation. The advisor should be an energetic faculty member with an interest in the purpose and goals of Pi Tau Sigma and with a strong interest in students. A Faculty Advisor is to be committed in the following ways:

- Be accessible to student members.
- Mentor students and provide resources.
- Facilitate interactions at all levels (department, industry, etc.).
- The advisor should be elected. Advisors appointed by administration may not have the needed interest or offer the needed support.
- The advisor should be a member of Pi Tau Sigma. If a "right" faculty member is available and is not a member, the chapter officers should check on the possibility of having the faculty member elected as an honorary member.

IX. University Recognition

It is the responsibility of chapter officers to ascertain that chapter operation complies with all university requirements for student organization. Many universities require that student organizations be registered with an appropriate office (e.g. Office of Student Affairs). Also, continued university sanction and recognition often require that an annual report be submitted to the appropriate university office.

X. Chapter Activities

The most basic and most important activity for each chapter is the election and initiation of new member twice during the year. If a chapter studies Items I through IV of this guide, it will be evident, however, that much more is expected. Active participation provides the avenue to achieve leadership skills. It provides a means of supporting your mechanical engineering department. It helps to form close bonds of friendship and professional association. Each chapter should strive to conduct projects or participate in activities that enhance the role of academic scholarship and professional growth. Another section of this guide has a listing of projects that have come from experiences of other chapters.

XI. Chapter Reports

Each chapter is required to submit an annual report to the International Pi Tau Sigma Office. This report should identify officers and summarize activities for the year. The report is to be included in the annual publishing of The Condenser. It serves as a means for Board of Directors to get a "pulse" reading of the chapter. The report should be prepared by the outgoing officers. Incoming officers should ascertain that the report was submitted. It is needed no later than the time of the convention in the fall. Examples of reports can be found in an issue of The Condenser.

XII. Convention

The honor society is governed by actions taken by the student delegates in attendance at the annual convention, which is held in the fall. Each chapter is required to have a delegate attend. An important activity each year is to plan for chapter representation at the convention. Since this involves travel expense, an important action is to seek funding from departmental, college, university, fund-raising, or benevolent sources. A small amount may be available from the International Pi Tau Sigma Office to help, but this amount is typically far from adequate. The chapter will be informed of the amount via communications from the Pi Tau Sigma Secretary-Treasurer.

XIII. Continuity of Chapter Operation

The major weakness of chapter operation is failure to have a smooth transition of operation from one academic year to the next. It is extremely crucial that each set of chapter officers strive to inform the new officers and transfer all information and files. Often, the end of an academic year is very busy and this is easy to neglect. The outgoing officers become relaxed and do not fulfill their duties in meeting with the incoming officers and therein take the necessary actions to affect a smooth transition of operation. The faculty advisor needs to play a key role in assuring that this occurs. This should be a high priority in establishing plans and in completing officer responsibilities each year.

XIV. Time Table for Chapter Operation

It is important that a chapter have guidelines on the time-line of operation for required as well as optional activities. Without such a time-line it may be difficult for a chapter to have the efficiency to make adequate contributions to the function and activities of that chapter. The checklist that follows outlines an approximate schedule of necessary actions for a chapter to stay in good status. A calendar should be prepared in advance. The calendar should also include other activities that are unique to a given chapter. Specific dates should be selected with the help of a campus calendar to avoid conflicts with other major university events, holidays, activities of other societies, and the Fundamentals of Engineering Examination

XV. Checklist for Chapter Operation

ACTION	TIMETABLE	CHECK OFF	COMPLETED DATE
officers meet; establish goals for term; set specific meeting dates and times;	before end of 1st week of term		
plan for attending convention: ascertain submission of chapter report*	by end of 3rd week of fall term		
identify students eligible to be invited for membership	by end of 4th week of term		
conduct a meeting for voting on new members	during 5th week of term		
orientation meeting for potential new members	during 6th week of term		
period of activities for new members	week 7 of term		
formal initiation of new members	no later than end of week 8 of term		
submit names and fees for new members to International Pi Tau Sigma office	no later than end of week 9 of term		
conduct special projects & activities	ongoing and regular		
prepare and submit chapter report**	3 week prior to end of spring term		
comply with university regulations; submit any required reports	as required by the university		
respond timely to directives from International Pi Tau Sigma office and Board of Directors	ongoing and timely		
check regularly for communications (UPS, US mail; e-mail)	ongoing and timely		
elect new officers**	by end of week 9 of spring term		
meet with new officers and conduct a smooth transition of records and information**	two weeks prior to end of spring term		
conduct general meeting; tours; guest speaker	ongoing and regular		
banquet (optional)	following formal initiation		

XVI A Listing of Potential Chapter Project/Activities

For PTS Community / International Pi Tau Sigma Office

- Organize bi-annual News Letter.
- Propose / undertake special projects that further the development of the PTS Community.
- Help other Chapters get their acts going.

For Students

- Sponsor programs on interviewing techniques and resume writing.
- Maintain a department research display board.
- Sponsor a graduate school introduction seminar.
- Maintain courtesy coffee during finals week or every Monday morning.
- Perform tutoring.
- Maintain lounge including research displays, magazines, etc.
- Sponsor or participate in Open House (Clubs, Fraternities, Honor Societies)
- FE Exam support (review sessions, company sponsorship of exam fees).
- Banquet for freshman students to support scholarship and introduce learning resources.
- Maintain a file of graduate programs.
- Distribute conversion tables to the ME student body.
- Advise freshmen and sophomores about classes (volunteer or for pay).
- Sponsor a career day with company representatives.
- Maintain a test file on all required ME courses.
- Prepare a guide to engineering elective courses consisting of responses of students currently enrolled in the courses.
- Sponsor an options night to help juniors select the sequence of courses best suited to their goals.

For Department

- Maintain a faculty picture board.

- Have members act as escorts for guests on campus.
- Print a department newsletter or maintain a department bulletin board announcing seminars, job opportunities, and activities of interest.
- Sponsor seminars with company representatives or professors.
- Proctor tests.
- Alumni social gathering(s).
- A visitation to pre-college level schools to promote general mathematics and science for all students.

For Community

- Sponsor a blood drive.
- Sponsor a program for juvenile delinquents.
- Judge a high school science fair.
- Sponsor an ME night for high school seniors.
- A visitation to pre-college level schools to promote general mathematics and science for all students.

Recognition Ideas

- Provide outstanding freshman, sophomore, junior or senior awards.
- Provide an outstanding ME instructors award.
- Provide a gag award to an "outstanding" ME professor (e.g. "The Purple Shaft"); could be used as a fundraiser by charging students a nominal fee to vote.
- Mail letters to high standing sophomores telling them about Pi Tau Sigma.
- Post a framed picture composite of current Pi Tau Sigma officers.
- Sponsor a picnic for top 25% of sophomore class.
- Nominate a distinguished professor for one of Pi Tau Sigma / ASME awards.
- Sponsor an honors banquet for high standing freshman and sophomore students.
- Provide a recognition award for very active Pi Tau Sigma members.
- Display active members and/or pledges on a framed picture board.
- Present an award for the highest score on the pledge test.
- Sponsor an award to honor students for outstanding service to the department and other students.

Pledge Program Ideas

- Each pledge writes a short autobiography to be published in the department newsletters.
- Each pledge makes a scaled drawing of the Pi Tau Sigma Key
- New initiates build class visual aids.
- Pledge essays on how to improve the ME department or how to get more students to participate.
- Construct a framed picture of all current initiates for the student lounge.
- Require a minimum of two hours of department tutoring.
- Sponsor a Tug-O-War and other related activities with other honor societies pledge classes.

Fun Activities

• *Sports/Intramurals*

Against faculty members; against other honor societies; against other organizations; members against pledges

• *Social Gathering*

Halloween costume party; ice cream mixer; wine and cheese party; beer and pizza party; pig or steer roast for students/faculty

• *Other*

Retreat outing for members; skiing; canoeing; camping; fishing; sponsor a department design contest; pinewood derby car race; paper plane building; move a brick with a mousetrap spring

• *Money Raisers*

Sell composite class pictures to graduating seniors; sell FE review manuals

XVII. Directory of Information

As described in Article VIII of the Bylaws, the Board of Directors may publish *The Story of Pi Tau Sigma* and *The Condenser*. The following is an outline of some pertinent information typically available within these publications. The following lists should provide a general guide for where specific information is located within the official publications. With the advent of the web the issue of what is published where is constantly under review and is changing.

Contents of *The Story of Pi Tau Sigma*:

- Chapter Index

- Selection of Members
- History of Pi Tau Sigma
- History of Local Chapters
- Constitution of Pi Tau Sigma
- Pi Tau Sigma Recognition Plan For Outstanding Young Mechanical Engineers
- Officers since 1920
- Membership growth since 1940
- Conventions, year and place
- Convention Procedure
- The History of the Condenser

(This is out of print and is no longer available. It will be reprinted and we hope put on the web.)

Contents of *The Condenser* typically include:

- Board of Directors
- Pi Tau Sigma Awards
- Convention Pictures
- Minutes of the Convention
- Secretary's Report
- Treasurer's Report
- Audit, Financial Statements
- Honorary Members (Current)
- Membership Numbers
- Announcement of Upcoming Annual Convention
- Committees and Discussion Assignments (for upcoming convention)
- List of Chapter Projects
- Chapter Reports
- Pi Tau Sigma Metal Castings
- Pi Tau Sigma Jewelry

XVIII. Correspondence and Notices

Each officer should consider the use of correspondence as an effective tool for his or her office. Letters and memoranda can encourage members to be a vital and active participant in the chapter. Some examples are included in Appendix B that should assist new officers in the use of correspondence. Some examples of meetings notices are included in Appendix C. Note that e-mail is effective but should not be relied upon totally until there has been unanimous member indication that they check e-mail regularly.

XIX. Initiation and Processing of New Members

This is the most important activity for a chapter. New members are to be elected and initiated twice during the academic year, once in the fall and once in the spring. New member names and appropriate dues are to be sent immediately to the Pi Tau Sigma Secretary-Treasurer. This action is a must in order for the names to be logged into permanent files and in order for personalized membership certificates to be issued. A member is not recognized at the Pi Tau Sigma level until this has been done. All new initiates are to be formally initiated following the official Pi Tau Sigma Rituals. There is a proper procedure for the processing of new members. The details for this are found on the inside front cover of The Condenser. This procedure should be followed closely and adequate records should be kept regarding the processing of new members. Membership certificates are ordered for new initiates from the list of new members submitted for processing to the Pi Tau Sigma Secretary-Treasurer. Initiate names should be typed exactly as they are to appear on the Pi Tau Sigma certificate. Appendix C includes information on the proper procedure for processing new members. This information should be thoroughly read to avoid complications with new member processing and certificate preparation. Membership is not official nor are members' names permanently recorded at the Pi Tau Sigma level until the names of new initiates and appropriate dues have been properly submitted to the Pi Tau Sigma Secretary-Treasurer. Note that the officers are encouraged to submit new initiate information and dues as early as possible to the Pi Tau Sigma Secretary-Treasurer to avoid delays. During busy times of the year, up to six weeks may be required for certificate processing.

XX. Chapter Awards and Recognition

A chapter may provide awards and recognition for new members, officers, and faculty. An award may be a piece of Pi Tau Sigma jewelry or a specially prepared plaque or certificate. Recognition may be given to the chapter president or other officers for his or her outstanding service to the chapter. Some chapters may choose to recognize the outstanding new initiate based on appropriate criteria. Also, some chapters may choose to recognize an "Outstanding Teacher" or perhaps some may choose to give the infamous Purple Shaft award to a deserving faculty

member. These awards may be in the form of a plaque, a certificate, a gift, Pi Tau Sigma jewelry, etc.

XXI Jewelry and Accessories

Pi Tau Sigma jewelry is available for purchase. Jewelry is optional and not automatic. Some chapters may choose to include in their initiate fee an amount to cover a jewelry item. Information on jewelry is found on the inside back cover of *The Condenser*. When placing jewelry order simultaneously with the submission of new initiate names and fees, please include two checks. If jewelry is ordered, the separate check for jewelry should be made payable to the current jewelry supplier. All forms and orders should be sent directly to the Pi Tau Sigma Secretary-Treasurer.

XXII. IRS Issues

There are important IRS regulations that apply to an organization. It is the responsibility of the chapter advisor and officers to ascertain appropriate regulations. Pi Tau Sigma is a 501 C 3 organization. If appropriately registered, each chapter will have its own unique EIN number, which is required for certain actions. There are printed IRS regulations governed such entities. It would be advisable for each chapter to have a current set of these regulations. If needed, it may be advisable to consult a tax expert. There are issues with any organization that collects fees and transfer money.

Also, contributors to Pi Tau Sigma often want to know if contributions are tax deductible. Typically, organizations of this type are required to file a form 990 each year. A general informational statement follows; however, questions should be addressed to an appropriate authority.

Each subordinate chapter, who has appropriately made written request, is recognized to be exempt from Federal Income Tax under section 501 © (3) of the Internal Revenue Code. It is understood that each chapter of Pi Tau Sigma is no longer required to file from 990 unless its gross receipts of each year are normally more than a certain amount (consult current regulations for this amount). The authority for this status was granted in a letter from the Ruling Section of Exempt Organizations Branch of the Internal Revenue Service in a letter dated June 1, 1972, which classified Pi Tau Sigma under the June 8, 1971, Federal Register, Vol. 36, section 1.6003-2 (g) (1) (iii) and subsections (I), (ii) and (iii) of section 1.6003-2 (g) (3).

For Chapters who qualify under the conditions described above, a letter containing the entirety of the preceding paragraph should be filed with your local Internal Revenue Service on you next filing date stating that your gross receipts are less than (the specified limit).