

# **Tau Beta Pi Florida Alpha**

## **Officer Guidelines**

*January 2012*

*Version 2.0*



# Version History

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<b>Version</b>	<b>Date</b>	<b>Editor</b>	<b>Description</b>
Version 1.0	August 2010	Leslie Maldonado (Corresponding Secretary)	Start developing officer guidelines
Version 2.0	December 2011/ January 2012	Meghan Ferrall (President)	Finish developing officer guidelines



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# Information for All Officers

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## Update These Guidelines

Throughout the years, the duties of each office or the way one should go about completing them may change. Please keep this manual as up-to-date as possible so that continuity can be maintained.

## Office Hours

Each officer is required to hold at least one office hour per week. Officer hours are held in the Tau Beta Pi office in WEIL 278. This hour will give the candidates, electees, members, advisors, and other officers an opportunity to ask questions, submit paperwork, and discuss pertinent topics. The key for the office may be checked out from Margie Williams in WEIL 312.

Officers will sign up for the time and day of their office hours at the Officer Meeting at the beginning of the semester. Only one officer can schedule to hold his/her office hours at a time. (This does not mean officers cannot be in the office outside their office hours.) Sign in and out of office hours each time in the lime green binder on the desk.

If you cannot attend your office hours one week, you are required to inform all Tau Beta Pi candidates, members, and advisors of the cancellation at least a day in advance. Send an email to the Communications Chair and the Webmaster so they can email the members and update the website, respectively. Do not repeatedly cancel your office hours.

There will be random checks to make sure officers are actually attending their office hours. Any officer caught not attending will be given a verbal warning the first time, a written warning the second time, and will be removed from office the third time. Officers removed from office are not eligible to run for any future offices with approval from the President and are not eligible for graduation stoles.

## Chapter Project Reports

At the end of each year, each chapter of Tau Beta Pi must submit an Annual Report containing information from all the events put on by the chapter. Officers need to write a chapter report on any event (whether or not it was sponsored by TBPI) that you lead. The Project Report Template can be found on our website under Officer FAQs at <http://grove.ufl.edu/~tbp/page.php?p=officerFaq#q1>. Submit the report typed in Microsoft Word, and do not change the formatting of the template or include multiple reports in a single file. Each report should be saved as MMDDYYYY – EVENTNAME (e.g. a specific GatorTRAX session would be saved as 10032009 – GatorTRAX Mousetrap Cars.doc or .docx). It is best to complete these within one week of hosting an event because the Project Report requires specific details, like costs and how much time spent organizing and participating in the event.



Chapter: Already filled out

Project Number: Leave blank

Check either new or recurring depending on event

Project Name: Same as the EVENTNAME from the file name (Do not include the date)

Date(s) of Project: Format MM/DD/YYYY

Project Area: Multiple categories may be checked

Number of persons who participated: Self-explanatory

Hours spent on this project: Hours spent preparing and participating in chapter projects should be specified in total person-per-hours (i.e. 30 members at a 1 hour planning meeting is listed as 1 hour not 30 hours).

General Description: What happened at the event?

Purpose: Why was TBP involved with this event?

Organization and Administration: Who organized the event? Were any other organizations involved with sponsoring the event? How was the event advertised and organized?

Cost & Personnel Requirements: Monetary costs (e.g. TBP paid half the cost of the rock climbing, and participants paid the remaining \$5) Personnel costs (e.g. needed instructors to teach basic rock climbing skills to all participants, volunteers from Gainesville High School helped run the registration table)

Special Problems: Money shortages? Weather issues? Not enough volunteers or participants?

Index of Exhibits: Leave blank

In addition to the project reports, you are required to take attendance and pictures at the event. Name the attendance sheet MMDDYYYY – EVENTNAME (should have the exact same file name as the corresponding project report, but with an .xls or .xlsx file extension), using the Attendance Sheet Template. Email the completed project report, the attendance sheet, and any flyers used to advertise the event to [tbpfla.annualreport@gmail.com](mailto:tbpfla.annualreport@gmail.com) and upload your pictures to the [tbp.photos](http://tbp.photos) Picasa account (email [tbpflalpha@gmail.com](mailto:tbpflalpha@gmail.com) for the password) within ONE week of the event. Make sure to copy the VP of Electees and the Member Coordinator in the email and confirm that you uploaded your pictures in the body of the email.

## Attend Meetings

All officers are required to attend all member and officer meetings, unless excused by the President. Officers on the Advisory and Executive Boards (defined in the Chapter Bylaws: Bylaw II Section 5) are also required to attend those meetings and any additional meetings scheduled.

**Advisory Board Members:** President, Vice President, Corresponding Secretary, and all Alumnus Advisors

**Executive Board Members:** President, Vice President, Recording Secretary, Corresponding Secretary, Treasurer, Cataloger, Vice Presidents of Electees, Graduate Coordinator, Benton Engineering Council Representatives, Engineer's Week Representatives, and the standing committee chairs.



## **Assist with Mail-Outs**

Each semester, Tau Beta Pi must send letters to all candidates to inform them of their eligibility. This requires folding, addressing, and stuffing hundreds of letters. All officers are required to assist the President with these mail-outs.

## **Help other officers with TBPI Activities**

All officers should help one another, whether or not it's in their job description. Some officers have substantially more work to do than others, and because we all want Tau Beta Pi to succeed, we should help as much as we can.



# President

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*Type of Position:* Elected

*Length of Term:* 2 semesters (1 year)

## Duties

- ④ Tau Beta Pi Florida Alpha President Accounts
- ④ Tau Beta Pi Reporting System
- ④ Chapter Bylaws
- ④ Center for Student Activities and Involvement
- ④ Send Out Eligibility Letters
- ④ Send Out Eligibility Emails
- ④ Schedule Required Semesterly Meetings and Deadlines
- ④ New Google Forms for Each Semester
- ④ College of Engineering Housekeeping
  - Tau Beta Pi Mailbox
  - Reserving the Weil Hall Conference Room
  - Email Margie Williams with officer information
  - Email Margie Williams the list of officers who may require night/weekend access
  - BEC Letter of Intent
- ④ Website
- ④ Active Membership
- ④ Listservs
- ④ Information Session
- ④ Meetings
- ④ Graduate Paperwork
- ④ Candidate Election
- ④ Initiation
- ④ Awards
- ④ Officer Election
- ④ National Documentation
- ④ National Convention
- ④ Corporate Dinner
- ④ Chapter Report

## Tau Beta Pi Florida Alpha President Accounts

### Gmail Account

Login: [tbpflalpha@gmail.com](mailto:tbpflalpha@gmail.com)

Get the password from the previous President.

This account is the administrator for the calendar and almost all the Google docs shared among the Officers. DO NOT change this, using a unique account makes it easier to pass the responsibilities from one President to the next. I know this means checking another account, but it'll keep the Chapter more organized.

### Dropbox Account

Login: [tbpflalpha@gmail.com](mailto:tbpflalpha@gmail.com)

Get the password from the previous President



To help with continuity throughout change in leadership each year, a Dropbox Account was created to hold documents, spreadsheets, PowerPoint presentations, etc. used by the President and Chapter.

## Voicemail

The President is responsible for checking the voicemails on the office phone. Get the password from the previous President.

## Tau Beta Pi Reporting System

You can access the Tau Beta Pi Reporting System at: <http://www.tbp.org/tbpeilig/>. The username for the chapter is: FLA and the pass phrase is changed annual, so it must be obtained from the previous President. This is the site that all the documents submitted to Headquarters is done by the Corresponding Secretary. From this site you can access all the membership eligibility lists, membership election lists, membership final action lists, membership statistics, chapter surveys, advisor evaluations, financial reports, and chapter information. You can also access report status, which tells you all the dates that Headquarters thinks various reports are due and whether or not they have received them.

## Chapter Bylaws

The Chapter Bylaws explain the rules of the Chapter. Hypothetically, you should have already read them, but either way read (or re-read) them before you take office. It's an easy read and it'll make sure you've learned the rules of the Chapter correctly. Rules passed down through experience and word of mouth has been unknowingly altered to contradict what's written in the Chapter Bylaws.

## Outline of Bylaws

BYLAW I	General rules
BYLAW II	Government and officer positions, including position descriptions, term lengths, and officer election requirements
BYLAW III	Chapter operations, including required semesterly meetings and quorum percentages
BYLAW IV	Election of candidates, including who is academically eligible, how to evaluate character, and the election procedure
BYLAW V	Initiation of electees, including electee requirements, distinguished electee requirements, revocation of election, and initiation postponement
BYLAW VI	Membership, including active and distinguished active membership requirements and graduation stoles
BYLAW VII	Chapter Honors, including Best Officer, Best Member, Best Electee, and Best Bent
BYLAW VIII	Finances, including minimum balance and approval for non-budgeted expenditures
BYLAW IX	Records and equipment, including minimum stock of graduation stoles
BYLAW X	Amendments (how to make changes to the Bylaws)





## Important Facts

**Election of New Members** requires a  $\frac{3}{4}$  quorum of the active membership and a  $\frac{3}{4}$  majority of votes to elect candidates.

**Revocation of election** requires a  $\frac{3}{4}$  quorum of the active membership and a  $\frac{3}{4}$  majority of votes revoke election of a candidate.

**Changing dues** requires a  $\frac{3}{4}$  quorum of the active membership and a  $\frac{1}{2}$  majority of votes to change cost of dues.

Making **changes to the Bylaws** requires a  $\frac{3}{4}$  quorum of the active membership and a  $\frac{1}{2}$  majority of votes to modify the Bylaws.

**Passing a financial assessment** requires a  $\frac{3}{4}$  quorum of the active membership and a  $\frac{1}{2}$  majority of votes to pass a financial assessment.

**Electing officers, including Alumnus Advisors**, requires a  $\frac{1}{2}$  quorum of the active membership and a  $\frac{1}{2}$  majority of votes to elect an officer or advisor.

**Routine business** requires a  $\frac{1}{2}$  quorum of the active membership and a  $\frac{1}{2}$  majority of the votes to conduct routine business.

## Center for Student Activities and Involvement

Each semester, we must re-register with the CSAI to be a legitimate organization at the University of Florida. This is required to be able to use University resources, like classrooms. Registration for student organizations in the fall is between April 15 and September 15.

### How to Register

1. Visit the CSAI in the Reitz Union on the 3rd floor or call them at 352-392-1671 and ask them to enable your UF account to log in to their system or check online for the Registration Form for a "General Student Organization":  
<https://www.studentinvolvement.ufl.edu/StudentOrganizations/RegistrationInformation> and submit the form to the CSAI. Once the CSAI activates the Tau Beta Pi account, you will only have 48 hours to complete the registration process. If you need more time, contact the CSAI and they can give you access for another 48 hours.

The form needs the name, email address, and telephone number for the President, Treasurer, and Faculty Advisor (use the Chief Advisor here).

2. After your account has been activated, login to the system at <https://www.studentinvolvement.ufl.edu/StudentOrganizations/RegisterUpdate>. You shouldn't need to change much of the information about Tau Beta Pi, but make sure to read over it to make sure it is all accurate.



3. You will need to update the officers each semester. The system does not give you the ability to delete officer positions, only to vacate them. Do not add a new type of officer position until you've read through all the vacant ones. (There are many repetitive positions, so there is rarely a need to create a new one.)
4. Submit the information and wait for confirmation from the CSAI that your registration is complete.

## CSAI Training

The Center for Student Activities and Involvement requires that a representative from each registered student organization attend yearly training. You should receive emails about the times and dates of the scheduled sessions towards the beginning of the fall semester.

## Spring Officer Update

In the spring, Tau Beta Pi does not need to be re-registered, but the officer information does need to be updated. The form to update officers is at <https://www.studentinvolvement.ufl.edu/Portals/1/Documents/Organizations/IDEAL/Docs/change%20of%20officer%20form11-12.pdf>.

Spring registration occurs between January 1 and January 15.

## Notes

The CSAI can re-new access to update officers as necessary (even though the email you receive says you will only have access to update officer information for 72-hours).

### Numbers required for registration

- Number of active membership – get from active membership spreadsheet
- Date of next officer election – the Tuesday before reading days of the upcoming semester at 7:30pm
- Number of on campus service events = 5 – approximate GatorTRAX, E-Futures, SECME
- Number of off campus service events = 6 – approximate value based on past project reports
- Number of service hours completed = 94 – gotten from chapter survey
- Number of charities helped = 0 – we don't really help charities specifically, just help community
- \$ given to charities = 0

### CSAI Desk Information

Phone Number: 352-392-1671

Hours: Monday-Thursday 8am-8pm; Friday 8am-5pm; Saturday CLOSED; Sunday 3pm-8pm



## Website Access

### Grove Website

The University of Florida offers a place to host organizational homepages (<http://grove.ufl.edu/>) for societies registered with the Center for Student Activities and Involvement. You can register for the Grove site once registration with the CSAI is completed. In addition to the webmaster, it is often good to make sure the President, Corresponding Secretary, and TEE Chair all have access to the website, because these positions are the most likely to have items that need to be updated immediately on the website.

### Registration

Registration for access to the Grove Website must be taken care of at the Hub. Be sure to take the name, UFL email address, Gatorlink ID, and phone number for all the people who need access to the website. The President is the only person who can complete the registration form. Make sure to bring your GatorOne to verify your identification. Once registration is completed, all those who are approved to edit the Grove Website will receive an email about how to access the site.

### How to Update the Website

The website is written in php and can be updated using any website client. A good client that has been used in the past is FileZilla. Important information needed for updating the website:

hostname: ssh.grove.ufl.edu

port: 22

username: tbp

password: your-gatorlink-username/your-current-gatorlink-password

Only approved (registered) students have access to update the website.

### Webmaster

The webmaster should be the registered as the society's webmaster with the University and should make major changes to the website as necessary. This is a one semester position. It is often easiest to email what changes you would like made to the webmaster. If you make any changes to the website, notify the webmaster to let him/her know that you have made changes, so he/she does not delete the change.

### Calendar

The calendar for the Tau Beta Pi Florida Alpha website is updated through the President Gmail Account and those who have access to update the calendar. Remember that some people have the calendar synced with their smart phones and rely on the calendar to remind them of upcoming Tau Beta Pi events, so make sure that is as up-to-date as possible.



## Eligibility Letters

At the beginning of each semester, you need to send out letters to the permanent addresses of those eligible. The corresponding secretary is responsible for getting the list from the College of Engineering, but you may need to remind them at the very beginning of the semester. Make sure all current members have been deleted from that list.

1. Update the letter, which can be found on the office computer or in the Dropbox Account, with the correct dates and names.
2. You can get the letters printed out at Target Copy for a pretty good price if you order through the College of Engineering. Yolanda Hankerson is in charge of the Tau Beta Pi bank account provided to us by the College. If you send her an email with the updated letter and ask her to order X number of letters from Target Copy, she can get the order completed in about a day. Make sure you asked for black and white copies, otherwise she will assume color which is 10 times more expensive (\$20 vs \$220). You will have to pick up the letters yourself from the store on University. Try not to get too many extras.
3. Ask Margie Williams in the front office (WEIL 312) for envelopes; you shouldn't need to buy any. We store the extra envelopes from each semester in the file cabinet in the office.
4. The Corresponding Secretary will print out all the addresses on the labels in the office. Do not buy more labels unless you run out. Also, make sure the Corresponding Secretary checks that the addresses are valid (i.e. that they each have a house number, street name, city and state, etc.).
5. After the Officer meeting at the beginning of the semester, have all the officers who can stay (those who don't have class) after to help fold and stuff. Don't seal the envelopes; the post office will do that before they're sent.
6. Margie will show you where to put the box(es) of letters so that the College of Engineering pays to mail them (this means that you should not purchase or put postage on the envelopes). Note that the University Mail is usually picked up between 9:00am and 9:30am, so if you drop them off early enough, they will go out with the mail that same day.
7. After the letters have been sent, there will inevitably be some returned; add those names and addresses to the DO NOT MAIL list. Add the addresses too in case that person eventually updates their address.

## Notes

Make sure to include in the letter that this that this eligibility applies for one semester and is reviewed each semester based the students enrolled in the College of Engineering.

Try to get the letter signed by the current dean of the college prior to the beginning of the semester, so that is not holding you up when going to send out the letters.



## Eligibility Emails

You will need to send out an email to the electee listserv (once it's been updated) informing them of their eligibility. (SIDENOTE: There's a sheet within the member spreadsheet that lists people who have repeatedly asked not to be emailed; make sure these email addresses have been removed.) Make sure to update the dates, times, locations, and names in the letter if you choose to use this exact email.

## Possible Email Template

*Spring 2011*

SUBJECT: You're eligible for Tau Beta Pi – The Oldest Engineering Honor Society in the Country

Dear Engineering Student,

Congratulations, you are eligible this semester to join Tau Beta Pi, the engineering honor society. We are the most prestigious engineering honor society in the country, and the only one that recognizes excellence in all engineering disciplines. Tau Beta Pi is the second-oldest honor society in America; the oldest is Phi Beta Kappa, which restricts its membership to students in the liberal arts. We strive to "offer appropriate recognition for superior scholarship and exemplary character to students in engineering." To qualify scholastically, you must be in the top 1/8 of your junior class, in the top 1/5 of your senior class, or the top 1/5 of graduate students.

There will be an information session for those candidates interested in joining on Tuesday, January 18th at 7:30pm in CSE E121. This session is optional, but highly-recommended if you are serious about joining because we will explain the membership process. The first MANDATORY meeting will be on Tuesday, January 25th at 7:30pm in CSE E121. We will provide free food at both the information session and the meeting. If you have any questions before the information session, please visit our website ([www.tbp.eng.ufl.edu](http://www.tbp.eng.ufl.edu)) or contact our Vice-Presidents of the Electee Process, *John Smith* and *Jane Doe*, at [tbpvpofelectees@gmail.com](mailto:tbpvpofelectees@gmail.com). We hope you see you on January 18th.

Sincerely,

*[Your Name]*

TBP Florida Alpha President

## Alternate Email Template

*Fall 2011*

SUBJECT: You're eligible for Tau Beta Pi – The Oldest Engineering Honor Society in the Country

Congratulations!

On behalf of the officers and members of the Florida Alpha Chapter, I am happy to inform you that your high academic standing allows us to consider you for membership in Tau Beta Pi, the engineering honor society. Tau Beta Pi was founded in 1885 to recognize outstanding students who display both distinguished scholarship in technical fields as well as exemplary character and is the only national honor society that recognizes excellence across all engineering disciplines.

Tau Beta Pi is highly regarded within industry and academia, and has grown to include 237 collegiate



chapters and has initiated more than 526,382 members. This is a great opportunity to get involved in the College of Engineering, and gain valuable leadership experience.

An info session will be held on Tuesday, September 6, at 7:30 p.m. (location is TBA) in order to acquaint you with what Tau Beta Pi is about and why you would make an excellent addition to the nation's second-oldest honor society.

The first meeting for those scholastically eligible to join Tau Beta Pi will be held on Tuesday, September 20, at 7:30 p.m. (location is TBA). Attendance at this meeting is absolutely necessary for those who wish to join. We will go over the eligibility requirements, as well as the induction process to become a member. Of note for graduate students, you need to have completed the first 50% of your coursework including research in order to be eligible this semester.

A brief overview of Tau Beta Pi is available at the following location: <http://www.tbp.org/Chapters/Resources/Membership/Einvitation.swf>

Additional information about Tau Beta Pi can be found at <http://www.tbp.org/> and details specific to our chapter, Florida Alpha, can be found at <http://grove.ufl.edu/~tbp/>. Our chapter website is updated frequently and will have room locations as soon as they become available.

Please contact us with any questions or concerns at [tbpflalpha@gmail.com](mailto:tbpflalpha@gmail.com).

We look forward to seeing you!

Best regards,  
Meghan Ferrall  
Tau Beta Pi - Florida Alpha President

P.S. Please read the attached letter from the dean of the College of Engineering, Dr. Cammy Abernathy, confirming your eligibility and outlining more details of the organization.

## Notes

It should be mentioned in both the letter and the email that this eligibility is good for one semester. If they candidate were to get elected and not initiated, we can postpone the initiation, but we cannot postpone initiation. We have had a case where a student has been eligible one semester but not tried to join until the next semester when they are no longer eligible and we had to inform the student that they are not actually eligible to join the current semester. There was confusion because the email said that the student was eligible, but the student did not realize that he was only eligible for that specific semester. To help avoid errors like this, the Corresponding Secretary and Graduate Coordinator should be check that the candidates who are applying are actually students who are academically eligible according to the information provided by the Registrar's Office.



## Semesterly Meetings and Deadlines

Each semester, Florida Alpha is required to have at least one Advisory Board meeting (President, Vice President, Corresponding Secretary, and the Advisors), one officer meeting, an information session, five general body meetings, and officer elections. It's recommended that you schedule all the meetings before the end of the previous semester so that we get a higher priority on the room reservations.

General Structure of Schedule

N	M	T	W	R	F	S
	1					
2	2	2, 3	2	2	2	2
		4, 5	5			
		6				
		7				8
8			9			8
8		10				8
8						
		11	12	13	13	14
14						15
15		16			17	15
15						15
15		18			19	15
15						
					20	
		21	22			

1. **Classes Begin** – They may begin on a different day depending on the semester; try not to begin TBP events until the second week of classes (or first full week). The Corresponding Secretary should visit the College of Engineering to pick up the list of eligible candidates on the first day of classes. The list will not be correct if he/she goes before that.
2. **Prepare Eligibility Notifications** – Get the envelopes, update and print out the letters, and have the Corresponding Secretary print out the address labels. This needs to be completed before the Officer meeting.
3. **Advisory Board Meeting** – This is your opportunity to discuss chapter problems with the Advisors and vote to reactivate deactivated members. Draft an agenda beforehand so that the meeting doesn't drag on. This meeting should be during 1<sup>st</sup> period to make sure it doesn't interfere with any of the Professors' classes. Dress is usually casual.
4. **Officer Meeting** – This meetings should be during 1<sup>st</sup> period to make sure it doesn't interfere with any of the Professors' classes. Dress should be business casual. Draft the agenda a couple of days before and send it to the Recording Secretary so he/she can print out copies for



everyone. Send out an email to the officers the week before to ask if any of them have points for the agenda.

5. **Send out Eligibility Notifications** – Send out the letters as soon as possible, this may mean you need to put the location as TBA. Wait to send out the email until you have a location.
6. **Information Session** – Update the slides from the previous semester’s information session. Make sure you’ve practiced a few times; they will be able to tell if you’re unprepared. You may want to have the GatorTRAX, SECME, and TEE Chairs to talk about their programs and have the VP of Electees go over the electee requirements (so the candidates meet officers other than you).
7. **Meeting 1** – Please do not repeat everything from the information session. A lot of members stop going to meetings because they feel the meetings are geared toward the candidates and electees. Meeting 1 should be the week following the information session. Be sure to check that you’re not interfering with a holiday.
8. **Member/Candidate Social** – This is the best opportunity the candidates and members will have to meet one another. It should be on a weekend after the first meeting, but before Election.
9. **Graduate Student Paperwork Deadline** – Graduate student paperwork (the qualification form and advisor letter) must be approved by Nationals before Election (we’ve gotten lower grades on our reports because of this). To make sure they have enough time to review all the paperwork, Nationals requires that you have it turned in 2 weeks before Election. The week cushion is to account for shipping delays.
10. **Meeting 2** – Meeting 2 should be two weeks after meeting 1. Be sure to check that you’re not interfering with a holiday. This is normally when Applications are due.
11. **Meeting 3** – Meeting 3 should be two weeks after meeting 2. Be sure to check that you’re not interfering with a holiday. Candidates must have all their paperwork turned in and requirements completed by this meeting since Election will be the next day.
12. **Election** – The Chapter Bylaws give you an overall explanation of how Election runs. The preparation required is explained later in this document.
13. **Election Notifications** – Send out individual emails to each person voted upon within 2 days of Election. This is especially important because the Electee-Only Social should only be attended by elected candidates and is held very soon after Election. For those candidates not elected, make sure to enumerate the reason(s) why he or she was not elected.
14. **Electee Only Social** – It is up to the VPs of Electees to plan this event, but it should be fun, encourage bonding between the electees, and contain no events or projects that could be construed as hazing.





15. **Meeting 4** – Meeting 4 should be two weeks after meeting 3. Be sure to check that you’re not interfering with a holiday. This is normally when the \$100 dues and catalog cards are due.
16. **Engineering Futures Session** – The Vice-President should plan this. Make sure to avoid large sporting events held on campus, GatorTRAX, and SECME.
17. **Deadline for Election Report and Catalog Cards** – This is the deadline for the Election Report and catalog cards to be turned into Nationals if you want to receive certificates and badges on time for initiation. This is not the final deadline, but the cards should be at Nationals by this date (not postmarked).
18. **Meeting 5** – Meeting 5 should be two weeks after meeting 4. Be sure to check that you’re not interfering with a holiday. This is normally when bent checks are performed, and the electees should have most of the requirements completed.
19. **Final Deadline for Election Report and Catalog Cards** – This is the final deadline for the Election Report and catalog cards to be turned into Nationals. You will not receive initiation approval until Nationals has received them.
20. **Initiation/Banquet** – Do not hold initiation without approval. The Initiation Coordinator is in charge of scheduling the practice assigning roles (with the exception of Alpha, the President always reads the part of Alpha). The Banquet Coordinator is in charge of planning Banquet. You have three jobs: Make sure initiation has been approved, take votes for the awards, and show up to both Initiation and Banquet.
21. **Officer Elections** – The positions and their responsibilities are enumerated in the Chapter Bylaws. Year-long positions should only be elected in the spring (at the end of the spring semester), and President Elect should only be elected in fall. For appointed positions (e.g. GatorTRAX Chairs, SECME Chairs, and TEE Chair), the outgoing and incoming Presidents, along with the outgoing chairs, should confer on the selections.
22. **Classes End** – There should be no more official events after the last day of classes.

## Notes

The Advisory Board Meeting and Officer Meeting are traditionally held in the Weil Hall Conference Room at 7:30am because this can usually be accommodated by most student schedules and the advisors are also usually free at this time.

Also, the President may choose to have these meetings during the first week of school, before any of the classes have really started giving assignments and it allows for planning a Members-Only Meeting the week before the Information Session, to, as Dr. Earle puts it, “rally the troops” before the Information Session.



## Google Forms

To maintain continuity, try to make tbpflalpha (not your personal email account) the owner of any Tau Beta Pi Google documents you create. This way, future Presidents can have access to this data. Do not make new Google forms for “Update Membership Status”, “Update Graduation Date”, or “Update Contact Information”.

You also need to share them with the appropriate people. The Application and Interview form need to be shared with the Vice-President, the VPs of Electees ([tbpvpofelectees@gmail.com](mailto:tbpvpofelectees@gmail.com)), the Corresponding Secretary, and the Graduate Coordinator because they are all members of the Interview Committee (i.e. they are allowed to conduct interviews). The VPs of Electees should create the Electee Spreadsheet and share it with you.

- Application
- Interview Form - You may change the questions however you want, but it is recommended that you speak with the other members of the interview committee before doing so.
- Electronic Catalog Card - Do not alter this form when you copy it (other than renaming it with the current semester).

## College of Engineering Housekeeping

### Tau Beta Pi Mailbox

There’s a mailbox in the College of Engineering office (near Margie’s desk in Weil 312) for Tau Beta Pi. Check it for mail at least once a week; before or after your office hours is a good time.

### Reserving Weil Hall Conference Room

Margie Williams (WEIL 313) is in charge of reserving the conference room. Visit her office and ask to reserve WEIL 307 for 1st and 2nd period the day of the officer meeting. If you don't plan on having the officers stuff envelopes after the meeting, you may not need 2nd period too.

### Email Margie Officer Information

Between Officer Elections and the first week of the new semester, email Margie Williams ([mwill@eng.ufl.edu](mailto:mwill@eng.ufl.edu)) with the new officer lists. She needs this list because you check out the key to the office from her, so she needs to know who may be holding office hours. She also needs to know who the GatorTRAX and SECME Coordinators are because they have separate keys for their own offices.

### Email Margie information for officers who need night/weekend access

Margie Williams can get night/weekend access for officers who need it by sending her their name, UFL email address, and UFID. Officers who may need night/weekend access include:

- President
- Vice President – need because organizes E-Futures Session



- Corresponding Secretary – good because may need access to office for paperwork reasons
- Treasurer – not critical, but it would be good for the treasurer to have access
- Vice President of Electees
- GatorTRAX Coordinators
- SECME Coordinators

## BEC Letter of Intent

Complete the “Organization Letters Of Intent to Benton Engineering Council” Letter of Intent that is sent out at the beginning of the semester.

Name of Organization: Tau Beta Pi

Website for Organization: [grove.ufl.edu/~tbp](http://grove.ufl.edu/~tbp)

Organization E-mail Address: [tbpflalpha@gmail.com](mailto:tbpflalpha@gmail.com)

Organization President: name, phone, e-mail

Organization Treasurer: name, phone, e-mail

Organization Representative: name, phone, e-mail

Verify that your treasurer and/or president have been registered with CSAI (F.I.R.E. Training) YES

Verify that you have been added to the [BEC.Everything@gmail.com](mailto:BEC.Everything@gmail.com) listserv. YES

By answering YES to the following, you grant BEC permission to distribute president email addresses to companies and programs (not for individual jobs, but for society meetings, etc.) YES

## Active Membership

To be an active member, the member must be registered for classes. Since the University of Florida requires that all registered officers be full-time students, any non-full-timers who want to be officers must be a position that is not required to be registered with the University (not President, Vice-President, Secretary, Treasurer or Historian). If a person is not registered for classes, he or she can still hold a lesser officer position, but they still cannot vote and you won't be able to register them with the CSAI.

## Listsers

The two best ways to communicate with members are by making announcements at meetings and sending out emails through appropriate listsers. Since we meet every other week, emails are a great way to let the membership know about upcoming socials and service events that they can participate in. When sending out emails to the various listsers, make sure to appropriately address the email (i.e. don't send an email addressed “Dear Electees” to the Members listserv). Active member listserv should only be used to let active members know about voting opportunities they must attend. We would like to get non-active members more involved, so we can help doing so by including them in emails regarding upcoming activities.

Five mailing lists available



- Officers: [TBPOFFICER2010-L@lists.ufl.edu](mailto:TBPOFFICER2010-L@lists.ufl.edu)
- Members: [TBPM2010-L@lists.ufl.edu](mailto:TBPM2010-L@lists.ufl.edu)
- Active Members: [TBPACTIVE-L@lists.ufl.edu](mailto:TBPACTIVE-L@lists.ufl.edu)
- Candidates/Electees: [TBPE2010-L@lists.ufl.edu](mailto:TBPE2010-L@lists.ufl.edu)
- Florida Alpha Alumni: [TBPALUMNI-L@lists.ufl.edu](mailto:TBPALUMNI-L@lists.ufl.edu)

Keep in mind that all emails sent to these lists must be approved by the Communications Chair, and the sender will not receive the email he/she sent, but a confirmation that the e-mail was sent.

## Information Session

The Information Session is often the first chance we get to introduce TBPI to new eligible candidates. It is very important to update the slides and practice presenting before the Information Session. Headquarters also has a video that describes benefits of joining Tau Beta Pi. It is also a good idea to arrange to have one of our advisors, like Dr. Earle, to come talk about the benefits of joining Tau Beta Pi. Make sure to email the advisor in advanced to check that he/she will be available the night of the Information Session.

## Sample Slides

## Meetings

The President is in charge of running all Chapter general body meetings. Each semester there should be an Advisory Board Meeting and Officer Meeting as well as five Chapter General Body Meetings held every-other Tuesday during the semester. An additional, Members Meeting, can be held the week



before the Information Session to discuss the upcoming semester with the members and get the ready for the Information Session the following week.

Meetings are a good time to let the membership and candidates/electees know about upcoming events. However, this should not be the only thing at these meetings. Meetings should include a component to encourage members to come out to the events, which can be done by including a corporate information session or an interview panel in preparation for the Career Showcase.

Possible meeting topics:

- Interview panel
- Graduate school speaker
- Alumni speaker
- Speaker about FE/PE
- Speaker about undergraduate research opportunities
- Speaker about developing soft skills
  - Networking
  - Interviewing

## Graduate Paperwork

Graduates must be approved by Headquarters before they can be voted on during Candidate Election.

### Paperwork

Graduate students must complete the graduate student qualification form and a signed letter from their primary academic advisor stating that they are in the top 1/5 of their class and have completed at least 50% of their coursework and research. For Master's, non-thesis, students, the letter should indicate that the student is halfway done and that they are not required to complete research since they are earning a non-thesis Master's degree.

Instructions for the graduate student qualification form can be found on the Chapter website at: <http://grove.ufl.edu/~tbp/page.php?p=paperworkInstructions#gradqualform>. The Graduate Coordinator must check through all qualifications forms submitted to make sure the forms are correctly filled out. Incorrectly filled out forms may result in the candidate being deemed ineligible due to confusion with the document. This is the same paperwork that must be filled out by Alumnus Candidates and Eminent Engineers who wish to be elected during Candidate Elections; they have some additional documentation they would need to provide to become eligible.

### Due Date

Graduate paperwork is due to Headquarters at least two weeks *before* Candidate Election. Because of this, the paperwork for graduate students is often due the week between the first and second general body meetings because the second general body meeting is exactly two weeks before Candidate Election (since Candidate election is traditionally held after the third general body meeting) and so there would not be sufficient time to get the documents to Headquarters.



## Candidate Election

Candidate election is the first major step towards initiation because it determines who the Chapter considers eligible for election based on character, since all candidates have been determined to meet academic eligibility requirements.

### Quorum

First check that a quorum is achieved, which means you have at least  $\frac{3}{4}$  of the active membership. If you have a quorum, use the number of active members present/voting to compute the number of “Affirmative” votes needed to pass the motion. “Negative” and “Abstain” votes are basically equivalent. The ratio of “Affirmative” votes to the total votes needs to be higher than  $\frac{1}{2}$  (i.e. for a 16-person quorum, 9 “Affirmative” votes are needed to pass with  $\frac{1}{2}$ ).

If possible, do not vote for Election of New Members via email or online means. NOTE: When voting via email or online, you automatically have a quorum because all active members are voting (100% quorum), but this also means you have to get  $\frac{1}{2}$  or  $\frac{3}{4}$  “Affirmative” votes of the entire active membership of the Chapter.

### Chair of Election

As President, you are expected to run the meetings and act as the chair (the person who runs the voting). Because you are the chair, you CANNOT voice your opinion during voting discussions. You have to remain un-biased when ruling. However, you do get to vote on the issues. Just remember to keep your vote private - specifically during hand-raise votes (silently add your vote to the tally). For election, you will not be a part of a group, so you will only vote during the final voting stages (vote online just like everyone else does). Even at election, you are NOT to voice any objections or opinions. If you have any points you want to be brought up at candidate elections, ask one of the VPs or Secretaries to bring it up for you. They must represent it as their own opinion, so if they disagree or don't want to bring it up, they don't have to. You can appoint someone else as chair if you would like to participate in discussions, but they must be a member of TBPI (privileged information cannot be divulged to outside sources). The person you appoint must follow the same guidelines specified above; if you appoint an Advisor or another non-voting member, it simplifies things because they don't get a vote anyway.

## Election

### Preparation

Prior to election, you should divide all the candidates up into four undergraduate groups and one graduate group. For election, you will need to choose five group leaders (usually the two Vice Presidents of Electees, Vice President, Corresponding Secretary, and Graduate Coordinator are good for these positions because they have the most contact with the candidates). Then divide up all the undergraduate candidates and put them into the four undergraduate groups. All graduate candidates should be put in the graduate group. Make each group of candidates a spreadsheet including all the answers to the interview questions and the photo of the candidate taken during the interview. Also, make sure that the Vice Presidents of Electees have the Candidate/Electee Progress Spreadsheet up-to-



date in time for Candidate Election because members will likely reference the spreadsheet during the election.

In addition to the Candidate Spreadsheets, make Google Voting Forms for each group. This can be easily done by making a copy of the previous semester's Google Voting Forms and editing the names to correspond to the current candidates. Each group should have a unique form that lists all the candidates in their group with the option of "Elect," "Not Elect," or "No Recommendation." Also make sure to make a Google Final Voting Form that includes all the candidates' names as well as the "Elect Group" and "Not Elect Group" options.

### ***Character Evaluations***

To evaluate character, the active membership will consider: (1) if the candidate has attended all the Chapter meetings; (2) the candidate's answers to the interview questions; (3) if the candidate has completed at least half of the service hours required to be initiated by election; (4) if the candidate attended the member/candidate social (keeping in mind, if active members don't know candidates, they can't evaluate character as easily); and (5) if the candidate has any "red flags."

### ***Voting***

Before voting begins, divide up the active members into one of the five groups. Make sure to give each group member a personal pin (four digit pins are probably easiest) and record which pin corresponds to members each group (don't match up pins to members, just pins to groups).

### **First Round of Voting**

During the first round of voting, email the group leaders the spreadsheet and Google Voting Form that corresponds to that group. Then the Chair should instruct the groups to review the candidate spreadsheet and the Candidate/Electee Progress spreadsheet and then individually vote whether to give a recommendation of "Elect," "Not Elect," or "No Recommendation" to the Chapter. Remind members that for those who choose "Not Elect" or "No Recommendation," they must give a reason for doing so because we must be able to explain why a candidate is not elected, if he/she is not elected.

Once all the groups have voted, the Chair should assemble a list of "Elect" Candidates, "Not Elect" Candidates, and "No Recommendation" Candidates (this should be based on the decision of the majority of the each group; i.e. if there are 5 people in a group and 3 members choose "Elect" for a candidate and the other 2 choose "Not Elect," then the candidate should be placed in the "Elect" Candidate Group). Next to the "Not Elect" Candidates, include the reasons why members believe that the candidate(s) should not be elected.

### **Second Round of Voting**

The second round of voting starts off by block voting. Email out the Google Final Voting Form to the group leaders and have them forward the form onto their group members. First, look at the "Elect" Candidate Group. The Chair should ask if there are any objections to anyone listed in the "Elect" Group. If there is an issue, move the candidate(s) to the "No Recommendation" Group. Continue on with asking the members to elect the "Elect" Group, if they feel like those candidates should be elected (members have the option of not electing the "Elect" Group, but then it defeats the purpose of having an "Elect"





Group if the candidate do not get elected). All members should partake in this vote, candidates needs a ¾ majority of the votes to be elected to electee status.

Next, look at the “Not Elect” Candidate Group. The Chair should ask if there are any objections to anyone listed in the “Not Elect” Group. If there is an issue, move the candidate(s) to the “No Recommendation” Group. Continue on with the members not electing the “Not Elect” Group, if they feel like those candidates should be not elected (here the members do not need to put a reason for choosing not elect because there should be enough information from the group recommendations).

Finally, the Chair should address the “No Recommendation” Group. In this group, the Chair and membership should go through each candidate individually and discuss which requirements that candidate had completed, any interview question answers members would like, etc. Once all discussion is concluded, the Chair should instruct each member to either vote “Elect” or “Not Elect” for the specific candidate and if he/she chooses “Not Elect” please give an explanation on why he/she did not believe the candidate should be elected. Continue with this process until all candidates on the “No Recommendation” Group have been discuss and voted on. Members on this list must receive a ¾ majority to be elected to electee status.

## **Election Notification**

In the days following the Candidate Election, the candidates should be notified letting them know that they have either been elected or not elected. Elected candidates must respond saying that they either accept or reject their election (this information must be submitted to Headquarters). Templates for the emails sent to the candidates (subject for email should be: [TBPI] Election Notification):

### ***Elected Candidates Email***

Here is a template for elected candidate emails. Make sure to include the Corresponding Secretary’s email address for accepting election, as well as information regarding the Electee-Only Social and if the candidate is missing any required documents.

Dear [Candidate Name],

On behalf of the Florida Alpha Chapter, I am happy to notify you of your election to join Tau Beta Pi. Being elected to membership in the national engineering honor society is a great honor, not only because of our high standards for scholarship and character, but also because these outstanding qualities have been recognized in you by your fellow engineering students.

I trust that you will accept our invitation to become a member and support our chapter activities. You must email me back (*[Corresponding Secretary email address]*) on whether you decide to accept or reject your election. Electee requirements to be completed before Initiation can be found on the TBPI website (<http://grove.ufl.edu>) on the Electee Requirements page located in the Candidates menu. *{If the candidate is missing something: You have not submitted your Qualification Form. This was due this past Tuesday, February 22. If you decide you would like to become a member, you MUST complete this ASAP or you will not be initiated this*





semester.}

If you have any other questions or concerns, please email the VP of Electees ([tbvpofelectees@gmail.com](mailto:tbvpofelectees@gmail.com)). If you decide you would like to become a member, the required Electee-Only Social will be this [*time and date of Electee-Only Social*]. Meet [*location of Electee-Only Social*]. You will be able to meet your fellow electees and learn more about Tau Beta Pi.

Again, congratulations! The opportunity to become a member of this highly respected Association should not be missed.

Hope to see you at the Electee-Only Social,  
[Name]  
[Position]  
Tau Beta Pi Florida Alpha

### ***Not Elected Candidates Email***

Here is a template for the email for not elected candidates. Make sure to include the reasons collected at the Candidate Election in the email and encourage them to try to join the next semester they are eligible to join.

Dear [Candidate Name],

On behalf of the Florida Alpha Chapter, I regret to inform you that you have not been elected to join Tau Beta Pi. The active members considered the following points during Election:

- If the candidate attended all the Chapter meetings
- The candidate's answers to the interview questions
- If the candidate has completed at least 4 service hours by election
- If the candidate attended the member/candidate social (keep in mind, if the active members don't know who you are, they can't evaluate your character)
- If the candidate has any "red flags"

The following are notes from Election as to why you were not elected:

Did not complete any service hours, turn in a Qualification Form or do an interview.

You are more than welcomed to try to join Tau Beta Pi next semester if you are still eligible. If you have any other questions or concerns, please feel free to email me back ([*Corresponding Secretary's Email Address*]).

Thank you and have a nice day,  
[Name]  
[Position]  
Tau Beta Pi Florida Alpha

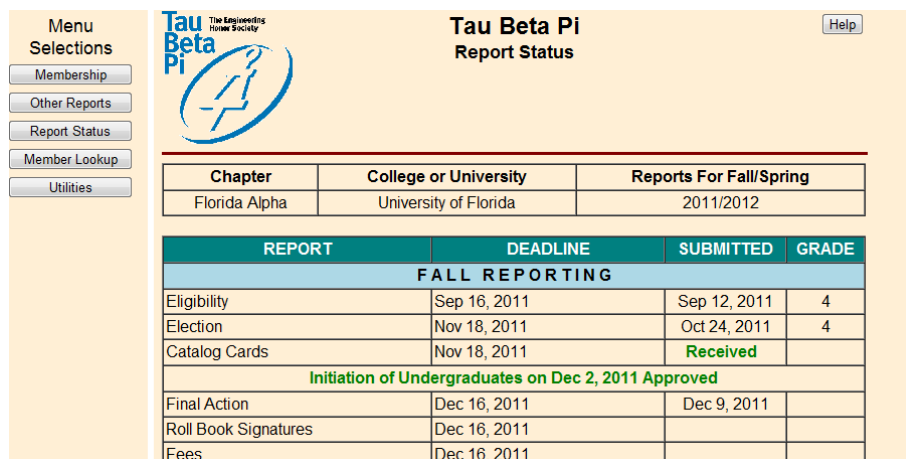


## Initiation

Initiation is the most important thing a Tau Beta Pi chapter must do each semester. Tau Beta Pi describes chapters based on a three-tier system. First tier chapter only initiate new members. Second tier chapters initiate new members and host a few activities. Third tier chapters initiate new members and host many events. In all three tiers, new members are being initiated, which is by Initiation Coordinator is one of the most important officer positions.

## When Can You Hold Initiation?

You must not hold Initiation before you have been approved. You can check that initiation for the chapter has been approved on the TBPI online system at: <http://www.tbp.org/tbpeilig/>. Once Headquarters has received and reviewed the catalog cards, you will get an email saying that the chapter is approved to hold initiation. The report status for the current academic year is updated, as shown below, to show whether or not initiation is approved. You must not initiate new members if you do not have approval.



Chapter	College or University	Reports For Fall/Spring	
Florida Alpha	University of Florida	2011/2012	
REPORT	DEADLINE	SUBMITTED	GRADE
FALL REPORTING			
Eligibility	Sep 16, 2011	Sep 12, 2011	4
Election	Nov 18, 2011	Oct 24, 2011	4
Catalog Cards	Nov 18, 2011	Received	
Initiation of Undergraduates on Dec 2, 2011 Approved			
Final Action	Dec 16, 2011	Dec 9, 2011	
Roll Book Signatures	Dec 16, 2011		
Fees	Dec 16, 2011		

## Rituals

During the initiation ritual, the President is to read the part of Alpha. There is no electronic copy of the initiation rituals, so you must make sure that the Initiation Coordinator plans a rehearsal at least one week in advance of the actual Initiation.

## Certificates

Certificates and keys should be delivered before initiation and given out after initiation. Certificates must be signed by the President and Corresponding Secretary before they are given out. Make sure that these signatures are completed prior to initiation.

## Awards

If possible, take the votes via email before initiation so that more than just those Officers helping out can vote and so you can get the checks from your Treasurer before Banquet. The Chapter may choose



not to give out any or all of these awards for a given semester. For instance, if the majority (more than 50%) of the votes are abstentions, then the award should not be given.

- Best Officer – Voted on by the officers. You are not eligible for this award and only get to vote in the event a tie needs to be broken. See the Officer page of the website for the list of eligible officers.
- Best Member – Voted on by the officers. Officers are not eligible for this award, this is only for members who were initiated in a previous semester (i.e. not newly-initiated members). Again, you do not get to vote unless there is a tie.
- Best Electee – Selected by the VPs of Electees. Make sure the selected electee is a distinguished electee; if there isn't one, then the award should not be given.
- Best Bent – Voted on by the officers who attend banquet. Only those newly-initiated members who attend banquet are eligible. It is up to you to decide if there is a bent of high enough quality to deserve the award.

## Officer Elections

Officer Elections should be held once a semester, after initiation of new members.

## Nominations

It often expedites the Officer Election process if members can nominate themselves or other members for positions open during the given election cycle.

### *Fall Positions Open*

Elected positions: President-Elect; Vice President of Electees (2 positions); Graduate Coordinator; Service Chairs (2 positions); Social Chairs (2 positions); Communications Chair; Webmaster; Member Coordinator; Alumni Coordinator; Fundraising Coordinator; BEC Representative; Initiation Coordinator; Banquet and Awards Coordinator; FE Review Coordinator; Pi Run Coordinator

Appointed positions: none

### *President-Elect*

President-Elect is a position that does not need to be filled during Fall Officer Elections. If either none of the members feels like they can accept a nomination or a nominated member does not receive the majority of the votes during Officer Elections, the members can vote to postpone election of the President to during Spring Officer Elections.

### *Spring Positions Open*

Elected positions: President (if applicable); Vice President; Recording Secretary; Corresponding Secretary; Treasurer; Cataloger; Historian; Vice President of Electees (2 positions); Graduate Coordinator; Service Chairs (2 positions); Social Chairs (2 positions); Communications Chair; Webmaster; Member Coordinator; Alumni Coordinator; Fundraising Coordinator; BEC Representative; Clock Tower



Coordinator; Initiation Coordinator; Banquet and Awards Coordinator; FE Review Coordinator; E-Week Representative; Pi Run Coordinator

Appointed positions: GatorTRAX Coordinators, SECME Coordinators, TEE Chair

## Officer Election Process

Like with Candidate Elections, the President is often the Chair of Officer Election. In the event that the President would like to run for one of the open positions, he/she must select another member to act as Chair during the election. The Chair can either be an active, non-active, or active non-voting member (i.e. an Alumnus Advisor), but must be a member of Tau Beta Pi.

During Officer Election, it is easiest to generate a document that has the name of the positions open followed by a list of those nominated by the members. The Chair will start off with the highest-ranking position and proceed in order of important, determined by order of positions defined in the Chapter Bylaws. The Chair will first ask if anyone needs an explanation or clarification of the duties of the position, then ask the member(s) nominated if they accept their nomination(s), then ask if any other nominations would like to be made at the current time. Once the Chair has a list of all members running for the position, the nominees will each give a speech (limited to 1 minute in length) and then the members can ask any questions they have regarding the ability of the member to complete his/her duty if he/she were to get the position. While one nominee is giving his/her speech, all other nominees should remain outside the room and cycle through until all nominees have given their speeches. Once all nominees have given their speech, all will wait outside the meeting room and the floor will be open up for members to discuss the nominees.

Once discussion has been finished, the Chair will take a vote to determine who wins the position. If three or more people run for one position and no one nominee receives the majority, then the Chair should repeat another vote with the two people who received the most votes.

Remember: during Officer Elections, you need a majority of  $\frac{1}{2}$  of the active membership. (So, if there are 20 active members, you need 10 members to hold Officer Elections and 6 members to elect the person).

The Chair must collect the name, phone number, UFID, and email address of all members who have been elected for each position. You will need this information when registering the club with CSAI.

## Electing Alumnus Advisors

Alumnus Advisors can hold terms of between 1 and 4 years. Ideally, all Alumnus Advisors would hold 4 year terms and each year during the Spring Officer Election, the membership would vote to elect or re-elect an Alumnus Advisor. You need at least 4 Alumnus Advisors, as required by our Chapter Bylaws and the National Constitution, but you may have more without a penalty. Alumnus Advisors do not require a PhD, but they must have graduated since being initiated into Tau Beta Pi. Some district directors suggest that active members who graduate, but wish to remain active in Tau Beta Pi, run as an Alumnus Advisor and act as a reference to help with continuity as leadership switches over for the new academic year.



## Appointed Positions

The President gets to determine the GatorTRAX Coordinator, SECME Coordinator, and TEE Chair. After electing positions, it is helpful to get an idea of who is interested in the appointed positions, so the Chair should ask who is interested. If there are many members interested in the appointed positions, you can have those interested fill out an application to review before selecting the appropriate members for the positions.

### Sample Application Questions

Name: \_\_\_\_\_ UFID: \_\_\_\_\_  
Email Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Position Seeking:     \_\_\_ GatorTRAX Coordinator  
                              \_\_\_ SECME Coordinator  
                              \_\_\_ TEE Chair

1. Why do you feel that you are qualified for this position?
2. What skills or benefits do you have to offer that other candidates may not?
3. What other student organizations have you been a part of in the past? Have you been an officer in those organizations?
4. Have you been a TBPI Officer in the past? If so, which position(s)?
5. What ideas do you have for the position?

## Reporting New Officers to Headquarters

In the fall, Headquarters requires that the contact information for the President, Vice President, Recording Secretary, Corresponding Secretary, Treasurer, and Cataloger be updated for the upcoming semester. This requires confirmation of local address, email address, and telephone number. This is most easily done by sending an email out to those officers asking if that information has changed, as shown in the email template below:

Hi guys,

I'm need to make sure all the contact information for your positions is up-to-date with Nationals, if your address, phone number or email address has changed since April, please let me know by tomorrow (12/14) at 5:00pm. This is important because Nationals often mails hard-copy items to the Gainesville address for various reasons. If all your information is the same, please reply with that. If you aren't sure what information that National's has on file, you can just send me the information and I'll make sure that it matches up.

Thanks,  
Meghan



In the spring, Headquarters requires information for the new officers, specifically President, Vice President, Recording Secretary, Corresponding Secretary, Treasurer, and Cataloger. They require summer address, local address, email address, and telephone number. This is most easily collected after Spring Elections.

## National Documentations

Throughout the semester, there are various items that need to be submitted to Headquarters; not all items must be submitted, depending on the events of the semester.

Headquarters Contact Information:

*First Class, Priority Mail, AND Express Mail:*

PO Box 2697

Knoxville, TN 37901-2697

*FedEx and UPS:*

508 Dougherty Engineering Building

1512 Middle Drive – UTK

Knoxville, TN 37996

*Phone:* (865)546-4578

*Fax:* (865)546-4579

Items that must be sent to headquarters:

- Letter detailing postponement of initiation (for those members that miss initiation and cannot be coordinated to attend an initiation at another chapter)
- Letters releasing alumnus members from initiation (this is when candidates would like to be initiated as alumnus members, although they had an opportunity to be initiated while in college and passed)
- Whenever significant changes to the Bylaws have been made, you must send a copy to Headquarters (it can be through email).

## National Convention

One member from each chapter, often the President, must attend the National Convention, held annual, to act as the voting delegate for the chapter.

## Expenses

### *Voting Delegate*

Headquarters will pay all expenses for one voting delegate for all travel and on-site expenses. They will also pay for all on-site expenses of one Alumnus Advisor per chapter and the travel for those selected by the district directors.



### *Non-Voting Delegate*

Each district also has a couple full-paid, non-voting delegate seats that can go to members in the district. If there are members interested in attending, you should email the district directors with the name, office (if any), and reason for why they would like to attend. The district directors will review all those interested in attending at determine which chapters will get to send non-voting delegates. In their decision, they consider size of chapter and how active the chapter is because they would like to use these seats to encourage members to become more active in Tau Beta Pi. All travel and on-site expenses are covered for those members.

Other non-voting delegates attending can get 20% of airfare for one per chapter up to \$200 covered.

### *Covered Expenses*

Headquarters will cover the cost of 21-day advance purchase of airfare. (Remember tickets are non-refundable and may only be used by the person purchasing them.) If traveling by car, Headquarters will reimburse 25¢ per mile. Each additional member (may be non-voting delegate or advisor) in vehicle is - 5¢ to a maximum of 40¢. They will also cover \$5 for breakfast, \$6 lunch, and \$8 for dinner en route to the Convention.

If flying to the National Convention, it is recommended to use the Tau Beta Pi Travel Agency (there is a link online where you confirm that you will be the voting delegate for the Convention). This is often easiest because you can see all the possible flights leaving Gainesville and their connections. Also, since you are the voting delegate and it can recognize you as such, it will purchase your airfare using the Tau Beta Pi account and you won't have to worry about reimbursement.

Any personal expenses (phone calls, pizza, movies, etc.) and room charge above double-occupancy are not reimbursed.

## **Attending Convention**

### *Career Fair*

Numerous companies and graduate schools come to the Recruiting Fair on-site at Convention the morning prior to the First Business Meeting of the Convention (Thursday morning, meetings start Thursday afternoon). If you would like to attend, please make sure to plan accordingly. Also, Headquarters collect Chapter Resume Books to distribute to the companies and graduate schools that attend the recruiting fair, so be sure to collect all this information prior to the submission deadline (which is usually 4-6 weeks before the Convention; directions for how the Resume Book/DVD should be formatted can be found at <http://www.tbp.org/Chapters/Convention/ResumeDVD.cfm>). The Vice President is traditionally responsible for compiling the Resume Book that is sent off to Headquarters.

### *Attire*

For the Thursday and Friday of Convention, the dress is business casual.

- Includes: suits, dress slacks, casual dress pants (chinos, khakis, etc.), skirts and blouses, dresses, collared shirts, sports shorts with collars (including banded collars), sweaters, sport coast,



blazers, dress shoes, casual shoes in good condition (loafers, bucks, docksides, low-heeled shoes)

- Does NOT include: jeans or jean-styled pants of any style or color, T-shirts, sleeveless shirts, shorts or mini-skirts, workout wear (sweat shirts, sweat pants, jogging suits), athletic shoes or sneakers, clothes with slogans or sayings, or worn, faded, or torn clothing

For Saturday of Convention, the dress is business casual.

- Suits, dress slacks, sport coats, blazers, dress shirt with tie, skirts and blouses, sweaters, and dress shoes.

### ***Committees***

Committees are appointed in the summer and delegates are notified by August about their duties (only voting delegates appointed to committees may participate in committee votes). There are seven standing committees and the others are ad hoc (numbers vary for each convention). Each committee selects its own chair during its first meeting. The committee will work to meet the objectives outlined by Headquarters.

Standing Committees: Petitions Committee, Constitution and Bylaws Committee, Chapter and Association Financial Affairs Committee, Rituals Committee, Convention Site Committee, Resolutions Committee, Award Committee

Not all delegates get appointed to committees. Those voting delegates who do not get assigned to a committee, and non-voting delegates, can attend E-Futures Sessions and Guest Speaker Sessions held during the committee meeting times.

### ***Business***

Convention business is handled through the committees. The committees are assigned objectives, like selecting award winners (i.e., R.C. Matthews, R.H. Nagel, etc.), make recommendations about a topic (i.e., MindSET, Chapter Website, etc.), or make motions to modify the Constitution and Bylaws of Tau Beta Pi (i.e., review nominations for future Conventions, etc.). During the Business Meetings, the committee chairs present their findings to the delegates to discuss and make appropriate

### ***After Convention***

After Convention, there are a few book-keeping items that need to be completed: the expense report for the voting delegate and chapter voting on amendments passed at Convention.

### ***Expense Report***

The expense report for voting delegates is due two weeks after the conclusion of Convention. It requires submission of all receipts and the Chief Advisor of the chapter must sign-off. It is best to turn in the document as soon as you can; the sooner you turn in the document, the sooner you can receive reimbursement.





## ***Amendments***

During Convention, the delegates and make changes to the Constitution and Bylaws that require ratification by the Chapters to take effect. Following Convention, the voting delegate will be send (by snail mail) a ballot by which the chapter should vote on the changes. The voting is due by April, but it is better to get the votes the next time there is a quorum, like at the next election, and mail the ballot back to Headquarters.

## **Corporate Dinner**

The Corporate Dinner was inspired by Georgia Alpha's (Georgia Tech's) successful Corporate Dinner in fall 2010. They shared their planning guidelines with us and in the summer of 2011, we adapted the guidelines to better fit Florida Alpha and hosted our first Corporate Dinner in fall 2011. The Corporate Dinner is coordinated by the President, Vice President, and the Fundraising Chair are responsible for organizing and hosting the Corporate Dinner. The Corporate Dinner is traditionally held in the Fall Semester, but may also be organized to host an additional dinner in the spring semester.

## **Sponsorship**

Sponsor Benefits: display company logo on our Chapter site for 1 year; display company logo on publications created with respect to our community outreach program; recruiter seats at the corporate dinner (bronze gets 1 seat, silver gets 2 seats, gold gets 4 seats); and a copy of the Florida Alpha Resume DVD

### Sponsor Levels:

- Bronze donate \$200 or more
- Silver donate \$400 or more
- Gold donate \$800 or more

## **Outline of Planning**

Planning must begin at the beginning of the Fall Fundraising Chair's Term.

### ***Timeline***

Late April/Early May:

- Contact the UF Career Fair Staff (at the CRC) to acquire a list of corporate contacts
- Determine the exact date of the UF Career Fair
- Set a date for the Corporate Dinner – a good idea is the night before the UF Career Fair Technical Day (possible conflicts: BEC may have something that night, SWE has something the night of the Career Fair)
- Set the date for the company registration deadline three weeks before the date of the Corporate Dinner
- Develop an advertising budget from the President and Treasurer
- Decide on the donation amounts required for attendance
- Decide on the number of students per table



- Decide on prices for students attending the event
  - Use variable rates for Tau Bates, candidates, other engineering honor societies
  - In fall 2011, Tau Bates paid \$10 and Candidates paid \$15 to attend (we did not have enough companies attend to invite other engineering honor society members)

June:

- Send invitation emails to corporations

June, July, August:

- Promptly and courteously respond to inquiries from the invited corporations
- Send emails with registration instructions to interested parties
- Once donations have been confirmed, send confirmations to the donors; also reply with a brief, personal thank-you message ASAP

July:

- Reserve the room for the dinner in a room at the Reitz (contact the Banquet Coordinator for information about reserving rooms at the Reitz – it is free of charge for Student Groups)
- Early July: re-send invitations emails to the companies who have not yet replied
- Send reminder emails with registration instructions to those who showed interest but did not donate/register
- Late July: re-send invitation emails to the companies who have not yet replied

August:

- Make a student registration form and embed it into the Chapter's Website
- Send final reminder emails with registration instructions to companies who showed interest but have not yet donated/registered
- Send student invitation emails to all active Tau Bates and initiates
- *If enough companies have shown interest*, send student invitation emails to the officers of all other UF Engineering Honor Societies and ask them to pass on the invitation to their members
- Attend the TBPI Information Session and advertise the Corporate Dinner to candidates; help with registration on site and in person
- Finalize the Dinner Contract with the Reitz
- Monitor the registration form and send student confirmation emails to those who have registered
- Collect the resumes of the registered students and write them onto resumes CDs
- Remind students to register by sending invitation emails again
- Remind students to send resumes after being confirmed
- Acquire recruiter giveaways
- Compose and print program brochures; insert the company description and logos provided in during the registration process



- Print out name tags for each student and recruiters; on the back of the name tags, indicate the table at which the student/recruiter must sit
- Compose a seating chart based on the student majors, company requested majors, and student preferences - if there are only a couple companies in attendance, it is not necessary to develop a seating chart beforehand, it is easier to have students choose their seat for dinner
- Make posters with the logos of the firms who have donated the most money
- Order custom bags with the UF TBPI logo to give out as souvenirs (a good site to order bags at is: <http://www.4imprint.com/tag/103/Plastic-Bags/product/16043-129/Convention-Bag-12-x-9-12>)

September:

- Register the last few students
- Ask other Tau Bates to volunteer to help on the day of the Dinner; you will definitely need help once hundreds of people need to be seated in the right location
- Go to the Corporate Dinner venue 3 hours in advance to set up tables, etc.
- Dress sharp

### *President and Vice President's Role*

The President and Vice President's roles in the organizing the Corporate Dinner should be contacting companies. The President and Vice President should generate a packet of information outlining who we are and our outreach programs we are trying to get funding for; this should be done by early May (it is probably easiest to modify an older version of the fundraising packet). The Fundraising Coordinator's job involves getting contacts, planning the event, and running the event. Reaching out the other officers is highly encouraged. Constant communication between all those involved with the Corporate Dinner plans is highly encouraged.

### *Planning Details*

- Set an advertising budget (approximately \$200 – should be enough to cover the costs of the bags and posters)
- A high estimate of the per-attendee cost of the Corporate Dinner is \$50 (Max price for dinner and venue)
  - GA-A's price – Fall 2010 – was \$50 a head
  - FL-A's price – Fall 2011 – was \$30 a head
  - By utilizing the fact that we can rent rooms at the Reitz for free, and then we only have to worry about the cost of the food.
- Plated dinners provide a more-professional/formal feeling; for FL-A's first attempt, we had those attending choose from a list of dinner options ahead of time, which helped reduce the cost
- Three levels of donation: bronze, silver, and gold
  - Bronze: \$200, 1 recruiter
  - Silver: \$400, 2 recruiters
  - Gold: \$800, 4 recruiters
- For those who would like an invoice or receipt, contact Yolanda Hankerson, she handles our Foundation Account and can generate invoices/receipts if necessary



- Respond to all corporate inquires immediately. Never leave an email unanswered for more than 24 hours. Your corporate contacts are “always” looking at their email account via Blackberrys or office computers; they will know “exactly” how long it took you to get back to them. Several representatives were very appreciative when replying within minutes of inquiries. Use your fast response time to present a serious and professional image
- Cooperate with the Banquet and Awards Coordinator in order to arrange the details for the Corporate Dinner venue
- If enough companies donate money, students from the other engineering honor societies are invited
- Be quick to send confirmations to the students who register; many will get impatient and complain that they have not yet received their confirmations
- Order the custom bags from [www.4imprint.com](http://www.4imprint.com). Call and ask for an order that is below the listed minimum production quantity if necessary. See <http://www.4imprint.com/tag/103/Plastic-Bags/product/16043-129/Convention-Bag-12-x-9-12>
- Be sure to ask for high resolution logos from each company, especially from the preferred sponsors

## How to Donate

### *By Credit Card*

Call the University of Florida’s Foundation Gift Processing toll-free number: 1-877-351-2377. Reference account number F001681 (COE c/o Tau Beta Pi). The toll-free number is staffed weekdays from 8:00am to 4:30pm.

### *By Check*

Make the check out to the University of Florida with a note/memo that says for Tau Beta Pi Florida Alpha. Mail the check to:

Tau Beta Pi Florida Alpha Chapter  
 Box 116550  
 312 Weil Hall  
 Gainesville, Florida 32611

### *Receipts*

We cannot generate a receipt, but talk to Yolanda Hankerson ([yhank@eng.ufl.edu](mailto:yhank@eng.ufl.edu)); she can get a receipt for donation generated given the following pieces of information: company’s name, company’s complete mailing address, contact person’s name, title, phone number, email address, and amount of expected contribution.

## Chapter Project Report

A Chapter Project Report must be submitted to Headquarters annually. This report contains project reports for each event held by the Chapter or that members from the Chapter attended. It is the



responsibility of the Historian to compile the report, but the spirit of the project is to get a bunch of members to work on the report.

## Project Reports

Everytime an officer hosts a Tau Beta Pi event (social, meeting, etc.) he/she must write a Project Report about the event, take attendance, and take pictures of the members at the event. Directions for completing a project report are described in the guidelines for all officers and on the Chapter website under Officer FAQs.

Officers' Reports:

- all meetings – President
- all socials – Social Coordinators
- all service events (except GatorTRAX, SECME, TEE) – Service Coordinators
- all GatorTRAX events – GatorTRAX Coordinator/CIT
- SECME (and related events like officer meetings) – SECME Coordinator/CIT
- TEE (each event) – TEE Chair/CIT
- Pi Run (including organizational meetings, if applicable) – Pi Run Coordinator
- Clock Tower meetings/work days – Clock Tower Coordinator
- Alumni Events – Alumni Coordinator
- Fundraising Events (outside of Pi Run and Socials) – Fundraising Coordinator

## Annual Report

At the end of the spring semester the Chapter must submit a compilation of all the project reports to Headquarters (Chapter Project Report). Previous Chapter Project Reports are posted online for reference.

Outline:

- Title Page
- Table of Contents
- Chapter Survey (completed online and then form copied and pasted into document)
- Officers (contains who were officers in the fall and spring semesters)
- Inducted Members (two lists, one for fall and spring semesters)
- Membership Timeline Summary (for each member, the number of hours per semester)
- Chapter Operations (meetings, elections, etc. project reports, organized fall then spring)
- Engineering Growth (GatorTRAX, SECME, etc. project reports, organized fall then spring)
- Engineering Education (E-Futures, TEE, FE, etc. project reports, organize fall then spring)
- Community Outreach (service project reports, organized fall then spring)
- Social Development (social project reports, organized fall then spring)

When compiling the annual report, the individual project reports must be numbered. One way this can be done is by outline the document in a separate document (using the project report titles) to get all the events in the correct chronological order and then determine the numbering. It is best to do this last, because if a project report is added at the last minute, the whole report does not need to be re-numbered.



## Chapter Survey

The Chapter Survey is a questionnaire to be completed by the President, and is best done if completed with the incoming President to help pass along knowledge and maintain continuity within the Chapter. This survey asks about the Chapter's membership, the Chapter activities, and comments about the Chapter and Tau Beta Pi.

The Chapter Survey can be accessed through the reporting site: <http://www.tbp.org/tbpeilig/> and is due June 1. It can be found on the Tau Beta Pi Online Reporting system under "Other Reports" > "Chapter Survey". Previous Chapter Surveys can also be accessed through this website. Below is a screen-shot of where the Chapter Survey Reporting can be accessed:

The screenshot shows a web interface for selecting a Chapter Survey date. On the left is a "Menu Selections" sidebar with buttons for Membership, Other Reports, Report Status, Member Lookup, and Utilities. The main content area is titled "Tau Beta Pi Chapter Survey Date Select (FL A)" and features the organization's logo. Below the title, a text prompt asks the user to "Select a Chapter Survey date from the list of entered surveys on the left and click on the desired button to continue." A dropdown menu on the left lists dates from 05/27/2011 down to 05/24/2003, all marked as "Submitted". To the right of the dropdown are five buttons: "Chapter Survey", "Print Chapter Survey", "Submit to HQ", "Delete", and "Back". At the bottom, a footer note suggests contacting the "Support Team" for questions or comments.

## Chapter Project Award

At the National Convention each year, Chapter Project Awards are given to chapters that show they have sustained excellent performance in project activities. After winning a Chapter Project Award for three consecutive years, the Chapter receives \$500 in scholarship to give to members or people at the University. To best advertise Tau Beta Pi, a good way to give out these scholarships is to award a \$100 Sophomore Scholarship to sophomores (to help get the Tau Beta Pi name out) and then two member scholarships (\$200 each) to active members. Tau Beta Pi stipulates that: (1) the funds be awarded to an undergraduate engineering student or students in your college; (2) the scholarship(s) be named "Tau Beta Pi Scholarship for Florida Alpha;" and (3) the National Headquarters be informed of the name and address of each recipient so that both the recipient(s) and the Chapter can be duly recognized and the check(s) can be mailed. Once the members have been determined, the President should send the name and address for the awardees to Headquarters to disperse the scholarships to the winners.

### *Sophomore Scholarship Questions*

Some possible questions for sophomore scholarship are listed below. The application can be found in the google forms of the President Gmail Account. It is probably easiest to have applicants fill out the form online to avoid losing any applications in the office and you can take the link done to prevent



applicants from filling out the form after the deadline. This sophomore scholarship is one way to get Tau Beta Pi's name out to the engineering students, so hopefully they will try to join Tau Beta Pi if/when they become eligible. The application should also include a description of Tau Beta Pi and our activities to inform the applicant about Tau Beta Pi.

Personal Information

Name: \_\_\_\_\_ UFID: \_\_\_\_\_  
Email Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Home Address: \_\_\_\_\_  
\_\_\_\_\_  
School Address: \_\_\_\_\_  
\_\_\_\_\_

Academic Information

Major: \_\_\_\_\_ GPA: \_\_\_\_\_  
Number of Semester Enrolled at UF: \_\_\_\_\_ Expected Graduation Date: \_\_\_\_\_

Essay Questions

1. Please list work experience, extracurricular activities, club or professional activities and memberships, honors and awards, and community service you have performed. Note leadership or elected positions held. Indicate involvement beyond the University if applicable.
2. Provide a short statement regarding your career goals and aspirations related to the field of engineering. (500-750 words)
3. Why is engineering important to you? (500-1000 words)

***Member Scholarship Questions***

Some possible questions for member scholarship are listed below. The application can be found in the google forms of the President Gmail Account and then posted online under Member Forms on the Chapter website. It is probably easiest to have applicants fill out the form online to avoid losing any applications in the office and you can take the link done to prevent applicants from filling out the form after the deadline. This member scholarship should be a benefit for active members only, this would be one way to encourage members to remain active in Tau Beta Pi.

Personal Information

Name: \_\_\_\_\_ UFID: \_\_\_\_\_  
Email Address: \_\_\_\_\_ Phone Number: \_\_\_\_\_  
Home Address: \_\_\_\_\_  
\_\_\_\_\_



School Address: \_\_\_\_\_  
\_\_\_\_\_

Academic Information

Major: \_\_\_\_\_ GPA: \_\_\_\_\_  
Number of Semester Enrolled at UF: \_\_\_\_\_ Expected Graduation Date: \_\_\_\_\_

Tau Beta Pi Involvement

Semester Initiated \_\_\_\_\_  
Leadership Positions Held \_\_\_\_\_

Essay Questions

1. Please list work experience, extracurricular activities, club or professional activities and memberships, honors and awards, and community service you have performed. Note leadership or elected positions held. Indicate involvement beyond the University if applicable.
2. Provide a short statement regarding your career goals and aspirations related to the field of engineering. (500-750 words)
3. Why is engineering important to you? (500-1000 words)





# Vice-President

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*Type of Position:* Elected

*Length of Term:* 2 semesters (1 year)

## Duties

- ④ Reserving meeting rooms
  - How to Reserve a Room
  - Information for Room Reservation
  - Checking Room Availability
- ④ Responsible of compiling the Chapter's resume book
- ④ Conduct meetings in President's absence
- ④ Plan and promote the Member/Candidate social
  - Attendance Spreadsheet
  - Social Pictures
  - Project Report
- ④ Plan E-Futures session

## Reserving Meeting Rooms

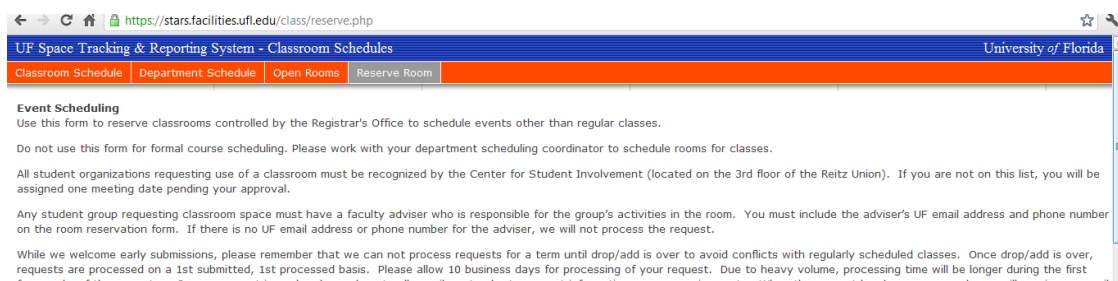
The Vice President is responsible for reserving rooms for all meetings, Information Sessions, Candidate Election, and Officer Election. It is best to submit this information as early as the dates are set, because they Registrar schedules rooms on a first-come, first-serve basis. If you submit the room request information before the end of Drop-Add Week, you will receive a bounce-back email saying that a room cannot be scheduled until after Drop-Add, but this is alright because it puts us in line to get a room reserved sooner.

## How to Reserve a Room

Room reservations can be found on the Registrar's website under Registrar Forms (<http://registrar.ufl.edu/forms.html>), under "Room Reservation for Student Groups".

Room Reservations for Student Groups: <http://registrar.ufl.edu/RoomsForGroups.html>

To submit a Room Request, you must log-in with your GatorLink username and password. Once you've logged-in, you will see:



Make sure that the “Reserve Room” tab is highlighted. Scroll down to the bottom of the page to submit the room reservation.

Term:    
 Group Affiliation:    
 Group Name or Course # & Section:    
 Purpose:    
 Adviser's Name:    
 Adviser's Phone:    
 Adviser's Email:    
 Requestor's Name:    
 Requestor's Phone:    
 Requestor's Email:    
 Room Size:    
 Room Preference:    
 Second Choice:    
 Meeting Dates:    
 Meeting Times:    
*Please list accurate start/end times, especially if multiple periods are needed.*   
 Other Comments:    
*By submitting this request, I certify that I have read and will abide by the room reservation guidelines.*

## Information for Room Reservation

Term: *Choose appropriate term*

Group Affiliation: *Student Organization*

Group Name or Course # & Section: *Tau Beta Pi*

Purpose: *General Body Meeting*

Adviser's Name, Phone, Email: *Chief Advisor's Information*

Requestor's Name, Phone, Email: *Vice President's Information*

Room Size: *100*

Room Preference: *CSE E121*

Second Choice: *NPB 1002*

Meeting Dates: *list all dates in order, i.e. 9/6, 9/20, 10/4, 10/18, 11/1, 11/15, 12/6*

Meeting Times: *E1-E2 (this gives us 7:30pm-9:05pm)*

## Checking Room Availability

Room availability for classrooms can be checked through this same online system, by going over to the “Classroom Schedule” tab. Choose the appropriate term, building, room, and date and the schedule for the week requested will be generated. This is helpful when scheduling rooms at last minute for other events, like the Electees-Only Social.

UF Space Tracking & Reporting System - Classroom Schedules							University of Florida
Classroom Schedule							Department Schedule
Open Rooms							Reserve Room
Term:	Fall 2011	Building:	CSE - COMPUTER SCIENCES/ENGINEERING	Room:	E121 - CLASSROOM (102)	Check Ad-Hoc Date:	<input type="text"/> GO
<b>SCHEDULED CLASSES - Fall 2011 - E121 COMPUTER SCIENCES/ENGINEERING - Capacity 102</b>							<b>AD-HOC EVENTS DECEMBER 20, 2011 to JANUARY 3, 2012</b>
Period	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	No Events Scheduled
01 7:25am							
02 8:30am	SYG2430 (55)	CGS3065 (46)	SYG2430 (55)		SYG2430 (55)		
03 9:35am	CIS4930 (0)	CGS3065 (46)	CIS4930 (0)	CGS3065 (46)	CIS4930 (0)		
04 10:40am		SYG2000 (101)		SYG2000 (101)			
05	EWG3007 (103)	EWG3007 (103)	EWG3007 (103)	EWG3007 (103)	EWG3007 (103)		



## Compile Chapter's Resume Book

The Chapter's Resume Book (also called Resume CD or Resume DVD) is a good incentive to give to companies that sponsor Tau Beta Pi and is also request by Headquarters prior to the National Convention, so it can be passed out to the companies who attend the Career Fair at the National Convention.

This is best done by sending out an email to all the members and asking for a PDF copy of resumes (Word documents can be converted to PDF files using the "Save As" feature and selecting PDF as the file type), for those who wish to participate. It is often best to send out this email over the summer break and then send reminder emails during the first week of the semester, three days before the deadline and then one day before the deadline; collecting all resumes by September 1<sup>st</sup> (this deadline may need to be pushed ahead of time depending on date of the National Convention). Do not collect resumes of graduate students. Have members name each file with their name (i.e. John\_Smith.pdf) and as you collect the files, sort them based on curriculum and place each resume in a separate folder (see table below for file names). Place the curriculum folders in a master folder called "University of Florida Resume DVD". Once completed, compress the folder into a ZIP format and email the folder to [resumes@tbp.org](mailto:resumes@tbp.org) before the deadline that Headquarters must receive resumes by. Headquarter has more information about making Resume DVDs at: <http://www.tbp.org/Chapters/Convention/ResumeDVD.cfm>.

File Name	Curricula Included	File Name	Curricular Included
Aero	Aeronautical engineering Aerospace engineering	Ag	Agricultural engineering
Bio	Bioengineering Biological engineering Biomedical engineering	Civil	Civil engineering Construction engineering Structural engineering
Chem	Chemical engineering Plastics engineering	Comp	Computer engineering Computer science Computer software engineering
Elec	Electrical engineering Electronic(s) engineering	Enviro	Environmental engineering
Ind	Industrial engineering Operations research and engineering	Matls	Material science and engineering Metallurgical engineering
Mech	Mechanical engineering	Nuc	Nuclear engineering Radiological sciences

## Conduct Meetings in President's Absence

In the event that the President cannot attend a meeting, the Vice President is responsible for conducting the meetings. The agenda is written a couple days prior to each meeting, so if you must cover a meeting, email the Recording Secretary and request a copy of the agenda for the upcoming meeting to review before the meeting.



## Plan and Promote Member/Candidate Social

The Member/Candidate Social is held one-two weekends before the Candidate Election and is planned by the Vice President. It is usually about 1-hour long, held on one of the fields on campus, and is a sort of field-day event. The first game is usually an ice-breaker that introduces all the members and candidates to each other. Later games include Ultimate Frisbee, Football, Egg-Drop, etc. The Vice President usually works with the Social Coordinators to plan this event. In addition to planning and hosting the event, the Vice President is responsible for the paperwork corresponding to the event: attendance spreadsheet, social pictures, and project report.

### Attendance Spreadsheet

For the Member/Candidate Social, an Attendance Spreadsheet must be filled out. The Attendance Spreadsheet can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Excel file. Simply fill in the necessary information for each person who attended the Member/Candidate Social: First name, last name, member/candidate/electee, sign in time, and sign out time. Each Excel file must be saved as MMDDYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.xls or .xlsx). Once completed and saved in the correct format, email this Excel file along with the corresponding Project Report and a message confirming the pictures taken have been uploaded to the TBPI Picasa account to the Historian within one week of the Member/Candidate Social. The Attendance Spreadsheet must also be emailed to the VP of Electees within one week of the Member/Candidate Social.

### Social Pictures

Pictures must be taken at the Member/Candidate Social. A large amount of pictures are not necessary or wanted. The most important part is that TBPI members and candidates/electees are in the pictures and show them participating in the event. All pictures taken must be uploaded to the TBPI Picasa account within one week of the Member/Candidate Social. In the email sent to the Historian with the Project Report and Attendance Spreadsheet, a message must also be included confirming the pictures taken have been uploaded to the TBPI Picasa account.

### Project Report

For the Member/Candidate Social, a Project Report must be filled out. The Project Report can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Word file. Simply fill in the necessary information as described in the Officer FAQ on the TBPI website. The Word file must be saved as MMDDYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.doc or .docx). Once completed and saved in the correct format, email this Word file along with the corresponding Attendance Spreadsheet and a message confirming the pictures taken have been uploaded to the TBP Picasa account to the Historian within one week of the Member/Candidate Social.



## Plan E-Futures Sessions

Work with the Social Coordinators to plan and host at least one Engineering Futures (E-Futures) session each semester. E-Futures sessions are free for Tau Beta Pi Chapters to host. Website for more information is: <http://www.tbp.org/pages/About/Programs/EF/EFmain.cfm>. E-Futures sessions are designed to teach engineers the “soft-skills” and have modules covering People Skills, Team Chartering, Group Process, Analytical Problem Solving, and Effective Presentation Skills.

The request form to host an E-Futures session can be found at:

<http://www.tbp.org/pages/About/Programs/EF/EFSession.cfm>. You must allow at least 4 to 6 weeks for scheduling, which means these events should be scheduled at the beginning of the semester. Chapters are not limited in the number of sessions they can host, so ideally we would host one or two per semester. Coordinate with the President about possible dates for hosting E-Futures sessions.

Tau Beta Pi has guidelines for hosting E-Futures sessions, which can be found at:

<http://www.tbp.org/pages/About/Programs/EF/EFHostingSession.cfm>. It is often helpful to have a sign-up for those interested in attending the E-Futures session, once it has been scheduled. If there is not enough interest by the members of the Chapter, we can invite other students at the University to attend the event (free of charge).



# Recording Secretary

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*Type of Position:* Elected

*Length of Term:* 2 semesters (1 year)

## Duties

- ④ Meeting Agendas
  - Electronic Copy
  - Hard Copy
- ④ Attendance Sheet
- ④ Chapter Minutes
- ④ Chapter Records

## Meeting Agendas

Agendas need to be made for the Officers' meeting and all chapter meetings during the semester.

You can use the template provided or make your own. If using the template provided, please make sure to update the officer list on the right hand side.

## Electronic Copy

By the Friday before, email the President, Social Chairs, Service Chairs, and GatorTRAX Coordinators about if they have any specific items that they would like to include on the Agenda.

The President should return your email with online of the meeting, which is going to be a major portion for the Agenda.

Social and Service Chairs may not have any upcoming events and therefore may not respond (depending on the chairs, they may respond that they have nothing planned or just not respond at all).

Check with the TBPI Calendar online to include any of the upcoming events from the Calendar that other people may overlook when emailing you.

Initiation and Banquet Coordinators should be emailed about items for the Agenda for meetings held after Election (usually meetings 4 and 5).

In the spring semester, include SECME Coordinators in your list of people to email about Agenda items.

- Be aware that SECME Coordinators may have items for the fall, depending on if they are trying to set up for people to meet with the SECME clubs after school.
- In the spring, SECME will have their own meetings for SECME Officers; make sure to include those dates and times on the Agendas.



## Hard Copy (Printing Agendas)

You can take the Agendas anywhere convenient for you to be printed (I always did it between classes at the Reitz Union copy shop; I never had a problem with the copies).

You should get about 70 copies for the first meeting. The first meeting will give you an idea of how many copies you'll need for future meetings. Also, the first meeting is likely to have the most number of candidates. Don't worry about making too many/not enough. If we have too many, they can be used as scrap paper and if you don't make enough, just make more copies next time.

To receive reimbursement for making copies of the Agenda, put the receipt along with a small note explaining that the receipt was from copying the Agendas in the Treasurer's mailbox in the TBP Office. The Treasurer will write you a check and leave it in his/her mailbox for you to pick up. (I've found that the easiest way is to do it whenever you have office hours and then by the next time you have office hours, the Treasurer should have had officer hours and been able to right you a check).

## Attendance Sheet

Attendance must be recorded for every event, so make sure to have a sign-in sheet at all the meetings.

The Attendance Sheets are used in the Annual Report TBP submits to Nationals every year, so it is important that they are accurate.

Once you have collected the sign-in sheet, put the list of students in the Attendance Sheet Template.

- You can download the Attendance Sheet Template from the TBPI website.
- Make sure to name everything properly, it helps with organization for putting the Annual Report together.

You'll need a copy of the list of members and candidates/electees at the meeting for the Minutes.

Email a copy of the Attendance Sheet to: the VP of Electees, Member Coordinator, and Historian. (The Historian is in charge of doing the Annual Report, which is why he/she needs a copy.)

## Chapter Minutes

Minutes should be recorded at every meeting.

You may use the template provided or make your own. If you use your own, make sure to include the list of people who attended the meeting, the time, the date, the place, the name of the meeting, and information about the next meeting.

I've found it easiest to take minutes right on the Agendas and then type them up later.

Once you have finished typing up the minutes, be sure to save a copy as a PDF.



Email a PDF copy to: President and the Webmaster (the Webmaster will post them online so those who can't make it to a meeting can stay up-to-date).

Try to get the Minutes finished within a week of the meeting.

## **Chapter Records**

The Recording Secretary is required to keep a record of the minutes of the chapter.

There is a binder that has the past Agendas and Minutes that I will give to you at the start of the fall semester with all this information in it.

It is probably easiest to usually leave it in the TBPI Office (Weil 278), but it may be a helpful resource when making Agendas and Minutes for the first time.





# Corresponding Secretary

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*Type of Position:* Elected

*Length of Term:* 2 semesters (1 year)

## Duties

- ④ Prepare and Submit All Chapter Reports
  - Submitting to Headquarters
    - Online Reporting System
    - Physically Submitting Documents
  - Convention Credentials
  - Fall Officer Information Update
  - Officer Signatures
  - Report of Eligibility
    - Things to Remember About Eligibility List
    - Candidate Letters
  - Report of Election
  - Report of Final Action and Photocopy of Roll Book Signatures
  - Report of Election of Officers
- ④ Submit Amended Chapter Bylaws
- ④ Report News, Problems, or Concerns of Chapter
- ④ Carry on Correspondence of Chapter as President Directs
- ④ Report Action Taken By Advisory Board
- ④ Model Schedule

## Prepare and Submit All Chapter Reports

Complete and submit all paperwork as outlined in the section below by the specified deadlines. Use the online report system to submit reports online. The required reports are as follows: Convention Credentials, Fall Officer Information Update, Officer Signatures, Report of Eligibility, Report of Election, Report of Final Action and photocopy of Roll Book Signatures, and Report of Election of Officers.

## Submitting to Headquarters

### *Online Reporting System*

Some of the reports that must be submitted to Headquarters are done through the Tau Beta Pi online reporting system found at: <http://www.tbp.org/tbpeilig/>.

User ID: fla

Password: obtain from previous President or Corresponding Secretary (this password must be changed annual, make sure you have the current password)



## Physically Submitting Documents

The contact information for Tau Beta Pi Headquarters is given below.

*First Class, Priority Mail, AND Express Mail:*

PO Box 2697

Knoxville, TN 37901-2697

*FedEx and UPS:*

508 Dougherty Engineering Building

1512 Middle Drive – UTK

Knoxville, TN 37996

## Convention Credentials

Convention Credentials is the first piece of paperwork that must be submitted to Headquarters as the new Corresponding Secretary. This is due each year on June 1 and requires delegate and alternate information (summer address, summer telephone, summer email, college address, cell phone, and fall email). The form can be obtained from the Tau Beta Pi Chapter Website (under the Convention tab) at <http://www.tbp.org/Chapters/index.cfm>. Only the bottom half of the Credentials form should be sent by June 1. The top portion of the Credentials should be submitted to Headquarters by the voting delegate at the National Convention.

## Fall Officer Information Update

The Fall Officer Information Update should be completed by the Corresponding Secretary by October 15. This is completed through the online reporting system (<http://www.tbp.org/tbpeilig/>) under Other Reports > Officer Information Related Reports > Update Information.

The screenshot shows the 'Tau Beta Pi Fall Contact Information Update Menu (FL A)' web interface. On the left is a 'Menu Selections' sidebar with buttons for Membership, Other Reports, Report Status, Member Lookup, and Utilities. The main content area features the Tau Beta Pi logo and a title. Below the title is a text instruction: 'To update Officer Information: select current report, then click 'Election Information'. 'Submit to HQ' after entering information for all officers/advisor.' A table with the header 'Year / Date / Status:' contains a list of reports from 2011 to 2007, all marked as 'APPROVED'. To the right of the table are buttons for 'Update Info', 'Print Copy of Update Report', 'Submit to HQ', and 'Back'. At the bottom, a note says 'Should you have any questions or comments, please contact the [Support Team](#)'.

Year / Date / Status:
2011 - 04/19/2011 - APPROVED
2010 - 04/19/2010 - APPROVED
2009 - 06/01/2009 - APPROVED
2008 - 04/25/2008 - APPROVED
2007 - 05/02/2007 - APPROVED

Headquarters requires the home address, home phone number, home email address, school address, school phone number, and school email address for the President, Vice President, Treasurer, Recording Secretary, and Cataloger. Once all the information for the officers has been updated, submit by highlighting the appropriate report and clicking the “Submit to HQ” button.



## Officer Signatures

The Record of Signatures Statement (Officer Signatures) is due to Headquarters by October 15. This requires signatures from the President, Corresponding Secretary, and Chief Advisor. This document is important because many of the documents submitted to Headquarters required signatures from either the President, Corresponding Secretary, and/or Chief Advisor, so this document gives Headquarters a document to compare signatures against. Below is a screen shot of the form, which can be obtained from the Tau Beta Pi Chapter's Website (<http://www.tbp.org/Chapters/index.cfm>) under the Reporting Tab.

Send via first class mail to:  
Tau Beta Pi  
P.O. Box 2697  
Knoxville, TN 37901-2697

Chapter _____
Date _____

**Record of Signatures Statement**

We certify that the legal signatures below are official. (They are necessary to provide signatures on replacement certificates and to verify report authority.)

<b>Report filed:</b> Report of Eligibility Report of Election Report of Final Action Officer Election Report Fall Contact Information Update Chapter Survey	<b>Signatures required:</b> President & Secretary President & Secretary President & Secretary President & Secretary President & Secretary President, Secretary, & Advisor
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Chapter President \_\_\_\_\_

Print President's Name \_\_\_\_\_

Corresponding Secretary \_\_\_\_\_

Print Secretary's Name \_\_\_\_\_

Chief Advisor \_\_\_\_\_

Print Chief Advisor's Name \_\_\_\_\_

(Note: A single statement covers all of the reports listed above for each group of officers. This is a graded report and a new statement should be submitted if any of the above officers change during the academic year.)

Due October 15

## Report of Eligibility

The Report of Eligibility should be submitted online as soon as the list is available (within the first five weeks of the semester). This report should be submitted through the online reporting system (<http://www.tbp.org/TBPelig/>) by either logging on to the system and entering the individual names online or downloading the Excel spreadsheet template, completing it, and emailing it to Headquarters. Instructions for downloading and submitting the spreadsheet are found at <http://www.tbp.org/Chapters/Reports/Membership/ExcelInstructions.cfm> and must be followed exactly.

### *Things to Remember About Eligibility List*

- Must list ENTIRE top 1/8th of juniors and top 1/5th of seniors
- Must list current members who are included in the list you obtain from your registrar (otherwise you will receive an error from the system)
- Can obtain a list of current members (Eligibility Menu > Current Membership)



- Each student must have:
  - Month and Year of Graduation
  - Curriculum selected from pulldown list (restricted to ONLY those approved curricula listed in the bylaws)
- Check those previously elected
- DO NOT mark current members as “Previously Elected”; check appropriate box

### ***Candidate Letters***

Each semester, Tau Beta Pi must send letters to all candidates to inform them of their eligibility. This requires folding, addressing, and stuffing hundreds of letters. All officers are required to assist the President with these mail-outs.

### **Report of Election**

The Report of Election should be submitted online as soon as electees accept their nomination, due two weeks before initiation. As a Chapter, the elected candidates are given 3-5 days to accept their Election, so this report can be submitted within a week or two of the Candidate Election. The Corresponding Secretary must log into the online reporting system (<http://www.tbp.org/TBPelig/>) and mark each student based on the following criteria:

- Rejected
  - A1 – Candidate was known to have no interest in membership
  - A2 – Candidate did not respond
  - B – Candidate does not meet the exemplary character requirement of the Eligibility Code
  - C – Candidate is not technically qualified because of transfer-student rule or other restrictions under the Constitution Art. VIII, Sec. 2 and Bylaw VI, Sec. 6.02(e).
  - D – Candidate was on Co-op or below chapter deadline and was not contacted
- Elected
  - Accepted
  - Refused

Catalog and online e-cards are a part of this report (which is the responsibility of the Cataloger). Keys and certificates will not be ordered until this report is completed (including that Headquarters has received the physical copy of the Catalog Cards).

### **Instructions for Delivery of Keys and Certificates**

Obtain instructions for delivery of keys and certificates from previous Corresponding Secretary and then email President with the guidelines to add to the Florida Alpha Officer Guidelines Document.

### **Report of Final Action and Copy of Roll Book Signatures**

The Report of Final Action should be submitted online immediately after initiation. Electees are not officially members until this report is received and processed by Headquarters. This report includes a



copy of the Roll Book Signatures should be mailed (due two weeks after initiation). For each student marked “Elected” and “Accepted” must also be marked:

- Initiated
- Postponed
  - Enter date or Semester/Year student will be initiated
  - A letter from the Advisory Board for any approved postponement must be sent to Headquarters. Approval is required to initiate a postponed student who does not appear on the eligibility list the following semester. A sample (editable) postponement letter can be found on the Tau Beta Pi Chapters’ website at <http://www.tbp.org/Chapters/index.cfm> under the “Membership” tab.

## Report of Election of Officers

The Report of Election of Officers is due two weeks after electing officers through the online reporting system (<http://www.tbp.org/tbpeilig/>). The report is found under the Other Reports > Officer Information Related Reports > Election of Officers > Election Information. Enter the date of election and term dates (usually June 1 to May 30).

The screenshot shows the 'Tau Beta Pi Chapter Officer Election Menu (FL A)' page. On the left is a 'Menu Selections' sidebar with buttons for Membership, Other Reports, Report Status, Member Lookup, and Utilities. The main content area features the Tau Beta Pi logo and the title 'Tau Beta Pi Chapter Officer Election Menu (FL A)'. Below the logo, there is instructional text: 'To report a new election: select new, then click 'Election Information'. To modify DRAFT report: select report, then click 'Election Information'. 'Submit to HQ' after entering information for all officers/advisor.' A section titled 'CHOOSE AN ELECTION:' contains a dropdown menu for 'Election Year - Date - Status' with options: '<new>', '2011 - 04/19/2011 - APPROVED', '2010 - 04/19/2010 - APPROVED', '2009 - 06/01/2009 - APPROVED', and '2008 - 04/25/2008 - APPROVED'. To the right of the dropdown are buttons for 'Election Information', 'Print Election Report', 'Submit to HQ', and 'Back'. At the bottom, a note says 'Should you have any questions or comments, please contact the [Support Team](#).'

## Report Deadlines

All report deadlines can be checked on the Chapter reporting website (<http://www.tbp.org/tbpeilig/>) under the “Report Status” button, then choosing the appropriate year and click the “Report Status.” This is very important because it lets you know when Headquarters thinks they should have certain documents and the grade (1 through 4, where 4 is the best) for each report.

The screenshot shows the 'Tau Beta Pi Report Status Year Select (FL A)' page. It has the same sidebar as the previous screenshot. The main content area features the Tau Beta Pi logo and the title 'Tau Beta Pi Report Status Year Select (FL A)'. Below the logo, there is instructional text: 'Select a year from the list on the left and click on the desired button to process Board information for the chapter.' A dropdown menu for 'Year' shows options: '2011 - 2012', '2010 - 2011', '2009 - 2010', '2008 - 2009', '2007 - 2008', '2006 - 2007', '2005 - 2006', and '2004 - 2005'. To the right of the dropdown are buttons for 'Report Status' and 'Back'. At the bottom, a note says 'Should you have any questions or comments, please contact the [Support Team](#).'



## Submit Amended Chapter's Bylaws As Necessary

Whenever the Chapter's Bylaws are amended, a copy of the Chapter's Bylaws, amended to date, with the written approval of the Advisory Board must be sent to Headquarters within two weeks of their adoption and amendment.

## Report News, Problems or Concerns of Chapter

Report to Headquarters any news such as honors received, any cases of discipline which might affect the standing vote of one or more members on the rolls of the Association, or any other Chapter business that would be of importance to Nationals.

## Carry on Correspondence of Chapter as President Directs

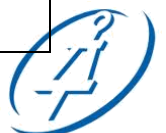
Complete any other correspondence the Chapter President may assign such as communicating with Headquarters any questions or concerns of the Chapter.

## Report actions taken by the Advisory Board

Report to Headquarters any and all actions taken by the Advisory Board of the Chapter.

## Model Schedule

<b>Fall</b>	
Within 3 weeks of the start of the fall semester	① Complete Fall Officer Information Update online
By October 15	① Complete and mail Officer Signatures to Headquarters
Within first week of the semester	① Obtain list of eligible students from Management Information Systems in the College of Engineering
Within first 5 weeks of the semester	① Complete and submit Report of Eligibility for undergraduates online
4 weeks before initiation (immediately after election)	① Complete and submit Report of Election online ① Ensure one set of filled out Catalog Cards is mailed to Headquarters ① Complete and submit E-Cards online ① Complete and submit Instructions for Delivery of Keys and Certificates online
Immediately after initiation	① Complete and submit Report of Final Action online ① Mail a Copy of Roll Book Signatures to Headquarters
<b>Spring</b>	
Within first week of the semester	① Obtain list of eligible students from Management Information Systems in the



	College of Engineering
Within first 5 weeks of the semester	<ul style="list-style-type: none"> <li>④ Complete and submit Report of Eligibility for Undergraduates online</li> </ul>
4 weeks before initiation (immediately after election)	<ul style="list-style-type: none"> <li>④ Complete and submit Report of Election online</li> <li>④ Ensure one set of filled out Catalog Cards is mailed to Headquarters</li> <li>④ Complete and submit E-Cards online</li> <li>④ Complete and submit Instructions for Delivery of Keys and Certificates online</li> </ul>
Immediately after initiation	<ul style="list-style-type: none"> <li>④ Complete and submit Report of Final Action online</li> <li>④ Mail a Copy of Roll Book Signatures to Headquarters</li> </ul>
Within 2 weeks after election of new officers	<ul style="list-style-type: none"> <li>④ Complete and submit Report of Election of Officers online</li> </ul>
June 1 (to be completed by newly elected Corresponding Secretary)	<ul style="list-style-type: none"> <li>④ Complete and mail bottom portion of Convention Credentials to Headquarters</li> </ul>



# Treasurer

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*Type of Position:* Elected

*Length of Term:* 2 semesters (1 year)

## Duties

- ④ Semester Budget
  - Budget Requirements and Distributions as Dictated by Chapter Bylaws
- ④ Balance Checking Account
  - Deposits
  - Withdrawals
  - Transfer Account
- ④ Maintain the Food Budget
- ④ National Fees and Requirements
- ④ Annual Taxes
- ④ Yearly Chapter Summary of Finances
- ④ Ensure Officers are Reimbursed
- ④ Student Government

## Semester Budget

At the beginning of each semester, create a budget and stick to it. Review past budgets and consult to past Treasurer and President to develop the budget for the semester. Make sure to inform Social Coordinators, Banquet and Awards Coordinator, GatorTRAX Coordinator, and any other position that may spend money, the budget for the semester. The easiest way to help stay on track is by making sure everyone knows the budget.

## Budget Requirements and Distributions as Dictated by Chapter Bylaws

Chapter finances are outlined in Chapter Bylaw VIII (as stated in amended version, December 6, 2011).

Section 1: The expenses of the Chapter shall be borne by the Initiation fee and by such dues and pro-rated assessments as may be voted by the Chapter.

Section 2: The specific amount of the Initiation fee to be charged shall be set during the first Officer meetings of each semester, subject to approval by a majority vote of the active membership of the Chapter. The Corresponding Secretary shall inform the Secretary-Treasurer of the Association concerning changes in amount of the Initiation fee.

Section 3: A committee composed of the President, Treasurer, and Chief Advisor shall submit a budget to the Chapter for approval by majority vote at the first regular meeting of the semester.

Section 4: The Chapter accounting system shall be based on generally accepted accounting principles as defined by the American Accounting Association.





Section 5: There shall be at all times a balance of at least \$530.00 in the Chapter treasury. A sum of no more than \$20.00 may be kept in petty cash.

Section 6: Expenditures in excess of \$20.00 shall be made by check, signed by the Treasurer. Expenditures of less than \$20.00 may be paid from petty cash by the Treasurer.

Section 7: Non-budgeted expenditures under \$60.00 shall be approved by the Treasurer. Non-budgeted expenditures between \$60.00 and \$120.00 shall be approved by the Treasurer, with the knowledge of the Executive Board. Non-budgeted expenditures over \$120.00 shall require two-thirds approval from the Executive Board. Reimbursements normally require both receipts and completed reimbursement forms.

Section 8: The Chapters fiscal year shall be May 1 to April 30.

Section 9: Immediately following the end of the Chapter's fiscal year, the Chief Advisor and Treasurer shall audit the books. Following the audit, the Treasurer, with the aid of the Treasurer-Elect, shall file the required information return with the District Director of Internal Revenue.

## **Balance Checking Account**

Keep all bank statements, inquire about any discrepancies. There should be a minimum of \$530 in the account at all times.

## **Deposits**

Deposit checks and cash within two weeks of receiving. Make copies of checks & deposit slips, enter deposited amounts into a checkbook spreadsheet/track throughout check book.

## **Withdrawals**

Written checks should be documented within the checkbook on the attached stubs, receipts of all checks should be kept and labeled with check number, person check written for, date, what the check was for.

## **Transfer Account**

The two names on the account, who can write check from the Sun Trust Account, are the President and Treasurer. After Spring Officer Elections, the former President, former Treasurer, new President, and new Treasurer must decide on a time to meet up at the Sun Trust (located on Newberry Road) and have the account information transferred from the former officers to the new officers. You must bring a signed letter from the former President stating the election of the new President and new Treasurer on Tau Beta Pi letter head, as well as photo identification. It is very important that this meeting occur as soon as possible, because all officers must be in town to transfer the account.



## Maintain the Food Budget

Yolanda Hankerson ([yhank@ufl.edu](mailto:yhank@ufl.edu); 352-392-2177 ext. 1029) is in charge of our University (Foundation) Account (food account). Her office is located on the second floor of Weil Hall (across the stairwell of the Tau Beta Pi Office).

At the beginning of the semester, before any meetings, stop by her office and check the remaining balance in our food account. There should be at least \$300 in the account (write a check to University of Florida and on the description line write TBPI food account) at the beginning of the semester, check back with her throughout the semester to make sure we don't over draw. Pizza is primarily where this money goes towards and typically, pizza for 1 meeting is \$100-140.

- The Social Coordinators are in charge of getting the pizza for the meetings, but they should also be informing you of how much is being spent for pizza.
- Drinks for meetings should be approximately \$20.

## Nationals Fees and Requirements

Throughout the semester you will receive mail from Headquarters, informing you of the Chapter's balance. Make sure to maintain this account and mail in checks whenever the Chapter owes money to Headquarters. The statements received by Headquarters will identify whether or not the Chapter owes money.

Payment for electee dues should be received by Headquarters within two weeks after initiation; you will receive a reminder letter about this.

If you have any questions, especially regarding National Fees and Requirements, contact Rebecca at Headquarters ([Rebecca@tbp.org](mailto:Rebecca@tbp.org)).

## Taxes

Keep up with the checking spreadsheet for tax purposes. You will be sent a reminder of when taxes are due. Check the previous year's receipt when filing.

Make sure that FE Reviews money does not exceed (check tax letter, approximately 32%) of our earned money.

## Yearly Chapter Summary of Finances

At the end of each semester, sit down with the Chapter's President and go over summary of finances. Have all documentation, checkbooks, etc. with you so you can reference them during the meeting.



## **Officer Reimbursements**

Try to get all officers their reimbursements as soon as possible and encourage them to meet with you to take care of this. Do not let officers wait until the last week of classes to get reimbursed, this way you keep better track of the finances and they don't lose their receipts. We must have receipts for EVERYTHING; make sure everyone is aware of this.

## **Student Government**

Throughout the semester you might receive emails from student government or BEC about attending meetings for our organization, check with the President and the officers of these groups to see if you actually need to attend (most of the time you don't because Tau Beta Pi does not receive Student Government funding).



# Cataloger

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*Type of Position:* Elected

*Length of Term:* 2 semesters (1 year)

## Duties

- ④ Collecting Catalog Cards
- ④ E-Cards for each Elected Eligible Member
- ④ Chapter's Electronic Catalog Card Database
- ④ Model Schedule

## Collecting Catalog Cards

After Candidate Election, all electees must complete a physical copy of the Catalog Card that must be submitted to Headquarters. This is due to Headquarters two weeks before initiation in order to receive Initiation Certificates in time for Initiation. Instructions for filling out the Catalog Cards can be found on the Chapter website at <http://grove.ufl.edu/~tbp/page.php?p=paperworkInstructions#catalogCard>. In the week or two before the electees must turn in Catalog Cards (usually about four weeks before Initiation), the Cataloger should hold additional office hours to allow more opportunities for electees to drop off their Catalog Cards.

## E-Cards for Elected Eligible Members

The Cataloger is responsible for inputting all the information from the Catalog Cards collected from electees into Tau Beta Pi's online system (<http://www.tbp.org/TBPelig/>). This report is part of the Report of Election completed by the Corresponding Secretary (obtain login information from President or Corresponding Secretary).

It is best if as the Catalog Cards are turned in, and reviewed to make sure they are filled out correctly, they are then added to the online system. The information on the physical copy of the Catalog Card and the electronic copy must match.

## Chapter's Electronic Catalog Card Database

Each electeed candidate is required, by the Chapter, to fill out an online version of the Catalog Card. The Cataloger is responsible for integrating this electronic copy of the Catalog Card into the Chapter's database for Catalog Cards.

Also, old hard-copies of Catalog Cards are currently being converted to electronic copies which also must be integrated into the Chapter's Catalog Card Database.



## Model Schedule

<i>Fall/Spring</i>	
Notification of Election (Wednesday or Thursday)	① Candidates are notified if they were either elected or not elected
Week following Candidate Election (Monday or Tuesday)	② Elected candidates accept/reject their election
Meeting 4 (Tuesday)	③ Physical Catalog Cards due from Electees
Week of Meeting 4 (Thursday or Friday)	④ Cataloger reviews all the Catalog Cards to make sure they are filled out correctly and then mail them to Headquarters
Two weeks before initiation	⑤ Cataloger must have all the Catalog Card information input into the Tau Beta Pi online system ⑥ Best if added to system as Catalog Cards are received and reviewed before being sent to Headquarters



# Historian

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*Type of Position:* Elected

*Length of Term:* 2 semesters (1 year)

## Duties

- 🕒 Attending Chapter Meetings, Socials and Service Projects and Take Pictures
- 🕒 Project Report and Chapter Project Report
  - Individual Project Reports
    - Gmail Account
  - Annual Report
    - Dropbox Account
    - Chapter Project Report Tips

## Attend Chapter Events and Take Pictures

The Historian is responsible for recording Chapter events by taking pictures at these events and posting the pictures on the Tau Beta Pi Picasa Account.

Username: tbp.photos

Password: obtain from previous Historian or President

If the Historian cannot attend a Chapter event, he/she must inform the officer hosting the event and make sure that he/she takes pictures of the event. In addition to having a record of Chapter events, the pictures taken at these events are used in the Chapter Project Report that must be submitted to Headquarters once a year.

## Project Reports and Chapter Project Report

A Chapter Project Report must be submitted to Headquarters annually. This report contains project reports for each event held by the Chapter or that members from the Chapter attended. It is the responsibility of the Historian to compile the report, but the spirit of the project is to get a bunch of members to work on the report. It is best to start working on this report early and enlist the help of other officers and members.

## Individual Project Reports

Everytime an officer hosts a Tau Beta Pi event (social, meeting, etc.) he/she must write a Project Report about the event, take attendance, and take pictures of the members at the event. Directions for completing a project report are described in the guidelines for all officers and on the Chapter website under Officer FAQs.

Officers' Reports:       all meetings – President  
                                  all socials – Social Coordinators



all service events (except GatorTRAX, SECME, TEE) – Service Coordinators  
all GatorTRAX events – GatorTRAX Coordinator/CIT  
SECME (and related events like officer meetings) – SECME Coordinator/CIT  
TEE (each event) – TEE Chair/CIT  
Pi Run (including organizational meetings, if applicable) – Pi Run Coordinator  
Clock Tower meetings/work days – Clock Tower Coordinator  
Alumni Events – Alumni Coordinator  
Fundraising Events (outside of Pi Run and Socials) – Fundraising Coordinator

### ***Gmail Account***

To avoid filling the Historian’s email account and to help with continuity of the Chapter, a gmail account was created for officers to email their Project Report and Attendance Sheets.

Login: [tbpfla.annualreport@gmail.com](mailto:tbpfla.annualreport@gmail.com)

Password: obtain from previous Historian or President

This gmail account can also help organize all the documents received throughout the year.

### **Annual Report**

At the end of the spring semester the Chapter must submit a compilation of all the project reports to Headquarters (Chapter Project Report). Previous Chapter Project Reports are posted online for reference.

Outline:

- Title Page
- Table of Contents
- Chapter Survey (completed online and then form copied and pasted into document)
- Officers (contains who were officers in the fall and spring semesters)
- Inducted Members (two lists, one for fall and spring semesters)
- Membership Timeline Summary (for each member, the number of hours per semester)
- Chapter Operations (meetings, elections, etc. project reports, organized fall then spring)
- Engineering Growth (GatorTRAX, SECME, etc. project reports, organized fall then spring)
- Engineering Education (E-Futures, TEE, FE, etc. project reports, organize fall then spring)
- Community Outreach (service project reports, organized fall then spring)
- Social Development (social project reports, organized fall then spring)

When compiling the annual report, the individual project reports must be numbered. One way this can be done is by outline the document in a separate document (using the project report titles) to get all the events in the correct chronological order and then determine the numbering. It is best to do this last, because if a project report is added at the last minute, the whole report does not need to be re-numbered.

### ***Dropbox Account***

A Dropbox account was created to help with continuity and to allow an easy way of sharing the project reports and attendance sheets among members working on the Chapter Project Report.



Login: [tbpfla.annualreport@gmail.com](mailto:tbpfla.annualreport@gmail.com)

Password: obtain from previous Historian or President

This account should also contain project reports and the Chapter Project Report from previous semester, to help guide those working on the Chapter Project Report.

### *Chapter Project Report Tips*

- Start early. Don't wait until May to start working on the document. Spend some time during Winter Break to start outline and tying up everything from the Fall Semester. Doing this will save a lot of time later on.
- Don't work by yourself. If only one person is working on this report, they will come to hate it and it will take forever. Reach out to other officers and members for help.
- Stick to the deadlines. Make sure that officers are submitting their project report and attendance sheet within one week of their event. Talk with the President if there are officers who are not submitting this information in an appropriate amount of time.





# Vice Presidents of Electees

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*Type of Position:* Elected

*Length of Term:* 1 semester

## Duties

- ④ Guide Candidates through the Election and Initiation Process
- ④ VP of Electees Gmail Account
- ④ Candidate/Electee Paperwork and Requirement
  - Eligibility Report
  - Election Report
  - Catalog Cards
  - Initiation Report
- ④ Plan and Organize Electee-Only Events
  - Attendance Spreadsheet
  - Social Pictures
  - Project Report

## Guide Candidates through the Election and Initiation Process

The VP of Electees should be well versed in all procedures and rules regarding eligibility and the process of becoming an electee/initiate. You will be required to make announcements at meetings explaining the process and providing updates and reminders. At the first General Body Meeting, the VPs of Electees are responsible for going over all requirements for joining TBPI. Candidates will have many questions and you will be the ones responsible for answering them. An electee requirements spreadsheet is the most effective way of communicating what electees have done and have left to do.

## Maintain the VP of Electees Gmail Account

Login: [TBPVPofElectees@gmail.com](mailto:TBPVPofElectees@gmail.com)

Password: obtain from the prior VP of Electees

The account should be checked at least daily and responses returned promptly. The email addresses for the listservs can be found in the TBPI office.

Also make sure to update the signature automatically generated by Gmail to reflect the new VP of Electees instead of having past VPs on emails sent out.

## Candidate/Electee Paperwork and Requirements

Collect, review, organize, and record candidate/electee paperwork and requirement status. All paperwork will be turned in to you either at the meetings or in the VP of Electees inbox at the TBPI



office. This paperwork should be sorted and recorded on the requirements spreadsheet promptly. You must also coordinate with social and service chairs to record those events and hours on the spreadsheet. Paperwork should be review to ensure completeness and that it was completed with the level of care expect of future members.

### **Eligibility Reporting**

At the beginning of the semester, a report is sent to Headquarters with all eligible candidates and their majors/class year. This is normally prepared by a team of the President, Vice President, VPs of Electees, and Corresponding Secretary. A list from the Registrar's Office is obtained by the Corresponding Secretary during the first week or two of classes indicating which students are eligible.

### **Election Report**

Following the Candidate Election, Headquarters must be notified which candidates have been elected. Those who have not been elected must be marked with one of a few reasons. This process is normally carried out in coordination with the cataloger, and is done online.

### **Catalog Cards**

Catalog cards should be given to the cataloger once their receipt has been recorded on the spreadsheet. The cataloger must submit the electees' names to Headquarters; you must ensure that the cataloger has a complete list of the electees that must be submitted. Failure to properly fill out paperwork will mean eligible electees will miss their initiation, so take extra care with these items.

### **Initiation Report**

After the initiation, Headquarters must be notified with the names of the electees who have been initiated. This means that you must keep a record of the electees attending initiation.

### **Plan and Organize Electee-Only Events**

The Electee-Only Social (formerly Electee Scavenger Hunt) is a traditional requirement for electees that should be organized by the VPs of Electees. Past years Electee-Only Socials can be used as a guide. A date must be chosen so electees can plan in advance to attend; the event is often scheduled for the week following the Candidate Election. In addition to planning and hosting the Electee-Only Social, the Vice Presidents of Electees are responsible for the corresponding paperwork: attendance spreadsheet, social pictures, and project report.

### **Attendance Spreadsheet**

For the Electee-Only Social, an Attendance Spreadsheet must be filled out. The Attendance Spreadsheet can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Excel file. Simply fill in the necessary information for each person who attended the Electee-Only Social: First name, last name, member/electee, sign in time, and sign out time. Each Excel file must be saved as MMDDYYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.xls or .xlsx). Once completed and saved in the correct format, email this Excel file along with the corresponding Project Report and a message confirming the pictures



taken have been uploaded to the TBPI Picasa account to the Historian within one week of the Electee-Only Social.

## Social Pictures

Pictures must be taken at the Electee-Only Social. A large amount of pictures are not necessary or wanted. The most important part is that TBPI members and candidates/electees are in the pictures and show them participating in the event. All pictures taken must be uploaded to the TBPI Picasa account within one week of the Electee-Only Social. In the email sent to the Historian with the Project Report and Attendance Spreadsheet, a message must also be included confirming the pictures taken have been uploaded to the TBPI Picasa account.

## Project Report

For the Electee-Only Social, a Project Report must be filled out. The Project Report can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Word file. Simply fill in the necessary information as described in the Officer FAQ on the TBPI website. The Word file must be saved as MMDDYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.doc or .docx). Once completed and saved in the correct format, email this Word file along with the corresponding Attendance Spreadsheet and a message confirming the pictures taken have been uploaded to the TBP Picasa account to the Historian within one week of the Electee-Only Social.

## Model Schedule

Fall/Spring	
By information session	<ul style="list-style-type: none"> <li>① Prepare and review PowerPoint slide of Electee requirements to present at info session and first meeting</li> <li>② Consider dates and times for the scavenger hunt</li> </ul>
By Second Meeting	<ul style="list-style-type: none"> <li>③ Receive electee paperwork and begin recording it into a requirements spreadsheet</li> </ul>
By Election Meeting	<ul style="list-style-type: none"> <li>④ Have up to date requirements spreadsheet to show where candidates stand at this point</li> </ul>
Immediately After Election Meeting	<ul style="list-style-type: none"> <li>⑤ Work with cataloguer to complete online Report of Election</li> </ul>
By Scavenger Hunt Day	<ul style="list-style-type: none"> <li>⑥ Prepare Electee-Only Social activities and documents</li> <li>⑦ Work with Officers to ensure they know how to run each station</li> </ul>
Before Initiation Night	<ul style="list-style-type: none"> <li>⑧ Prepare a final list of eligible electees and bring multiple copies to the initiation (include phonetic spellings)</li> </ul>



# Graduate Coordinator

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*Type of Position:* Elected

*Length of Term:* 1 semesters

## Duties

- ④ Graduate student, alumni, and eminent engineer paperwork
- ④ Election of graduate student, alumni, and eminent engineers
- ④ Model Schedule

## Paperwork

The Graduate Coordinator should liaise with the Vice Presidents of Electees in administering the paperwork for graduate students, since special steps must be taken to elect and initiate graduate student, alumni, and eminent engineers.

Graduate students, alumni, and eminent engineers must fill out the Tau Beta Pi Association Report of Eligibility form (<http://tbp.org/Chapters/Reports/Paper/SectionEligibility.pdf>). This form is due to Headquarters at least two weeks before Candidate Elections and be completed correctly. Directions for correctly completing the Report of Eligibility form can be found on the Chapter website at: <http://grove.ufl.edu/~tbp/page.php?p=paperworkInstructions#gradqualform>. It is the responsibility of the Graduate Coordinator to review all the documents before submitting them to Headquarters. Common problems with filling out the form include: repetition of educational background, incorrect Chapter name, and not getting the signature of the candidate's primary advisor.

In addition to the Report of Eligibility form graduate students must also supply a letter from their primary advisor stating that they have completed at least half of course work, including their research. If it a student is a non-thesis seeking Masters' student, the letter should state that fact. Alumni candidates must show that their class rank was in the top 1/5 standing and provide a professional engineering record (resume). Eminent engineer candidates must also submit a professional engineering record (resume or vitae).

The Report of Eligibility forms are traditionally collected from graduate students, alumni, and eminent engineers one week after the First General Body Meeting. Once collected, the President, Corresponding Secretary, and Chief Advisor must sign each candidate's form before send to Headquarters. Forms should be sent to:

Tau Beta Pi  
PO Box 2697  
Knoxville, TN 37901-2697



## Election

During Candidate Elections, the Graduate Coordinator acts as the group leader for reviewing graduate students, alumni, and eminent engineers seeking election. During the first round of voting in the Candidate Elections, all the graduate, alumni, and eminent engineer candidates are put into the Graduate Group to review and make recommendations of whether to “elect,” “not elect,” or “no recommendation” to the Chapter. Only those graduate students, alumni, and eminent engineers who have been approved by Headquarters can be elected.

## Model Schedule

<i>Fall/Spring</i>	
First General Body Meeting	③ Explain requirements to the candidates, highlighting that for graduate students, alumni, and eminent engineer paperwork is due the following week
Graduate Paperwork Due	③ Traditionally, all graduate student, alumni, and eminent engineer paperwork is due one week after the First General Body Meeting to assure that all paperwork will arrive to Headquarters on time
Second General Body Meeting	③ Headquarters needs all graduate student, alumni, and eminent engineer paperwork by this date (2 weeks before Candidate Election)
Candidate Election (following Third General Body Meeting)	③ Only those candidates approved by Headquarters in the weeks before Candidate Election are eligible to be elected ③ Graduate Coordinator acts as Graduate Group Leader during Candidate Elections



# Service Coordinators

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*Type of Position:* Elected

*Length of Term:* 1 semester

## Duties

- ④ Organize Service Projects
  - Service Project Ideas
- ④ Announce Service Projects
- ④ Take Attendance and Pictures at Service Projects
  - Attendance Spreadsheet
  - Project Pictures
- ④ Submit Paperwork
  - Project Report
- ④ Service Contacts

## Organize Service Projects

Contact organizations that accept volunteers and inquire about having a student organization volunteer for them. Work with the organization to pick out possible dates and times. Before deciding on a date and time, look at the TBPI Calendar on the TBPI website to make sure the service project does not conflict with other TBPI events. Find out from the organization the location of the service project and any other requirements needed to volunteer for them such as materials that need to be provided by TBPI, paperwork that has to be filled out by each volunteer, appropriate dress for volunteers, etc.

Make sure there is some form of transportation available to get to the location of the service project for those who wish to attend. If necessary, ask other officers for help in setting up a carpool to the location of the service project.

Contact information of organizations that TBPI has worked with in the past can be found in the Service Contacts document. Do not limit the service projects to these organizations. Contact others and add to the Service Contacts whenever a successful service project is organized that can be repeated in the future.

## Service Project Ideas

Some service projects that TBPI has participated in the past:

- Top Soccer
- Street Clean Ups – Oaks Mall, Downtown, Campus
- Serving food at the St. Francis House
- Pet Adopt-a-thon
- Hearts for the Holidays



## Announce Service Projects

Once a service project has been organized, announce the project along with the day, time, and location to the members and candidates/electees by email through the listservs. Provide any other details those interested would need to know such as directions, appropriate dress, etc. In the announcement email, request a response from those who will attend to determine if there will be enough volunteers for the service project. Make announcements at least 2 to 3 weeks before the scheduled service projects to give members and candidates/electees sufficient notice.

Announce the service project at all TBPI meetings leading up to the day of the project. Email the Communications Chair with the announcement so they can put it in the meeting agenda. Do this by the deadline they place for announcements to go in the meeting agendas. Add the service project to the TBPI Calendar through Google Calendar.

## Take Attendance and Pictures at Service Projects

Attend the organized service project and ensure all TBPI members and candidates/electees sign in when they arrive and sign out when they leave. The first name, last name, whether they are a member, candidate, or electee, sign in time, and sign out time of every person who attended must be recorded. This can be done on a sheet of paper with the needed information as column titles or on a laptop using the Attendance Spreadsheet provided on the TBPI website which has the correct column titles already. Either way, the necessary information for each person who attended must be placed into the Attendance Spreadsheet for that service project and emailed to the Historian and the VP of Electees in the correct format within one week of the service project.

During the service project, pictures must be taken of TBPI members and candidates/electees participating in the project. These pictures must be uploaded to the TBPI Picasa account within one week of the service project.

## Attendance Spreadsheet

For each service project, an Attendance Spreadsheet must be filled out. The Attendance Spreadsheet can be found on the TBPI website. Only one Excel file should be filled out per service project. Do not put the attendance from multiple service projects in a single Excel file. Do not change the format of the Excel file. Simply fill in the necessary information for each person who attended the service project: First name, last name, member/candidate/electee, sign in time, and sign out time. Each Excel file must be saved as MMDDYYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.xls or .xlsx). Once completed and saved in the correct format, email this Excel file along with the corresponding Project Report and a message confirming the pictures taken have been uploaded to the TBPI Picasa account to the Historian within one week of the service project. The Attendance Spreadsheet must also be emailed to the VP of Electees within one week of the service project.



## Project Pictures

Pictures must be taken at each service project. A large amount of pictures are not necessary or wanted. The most important part is that TBPI members and candidates/electees are in the pictures and show them participating in the service project. All pictures taken must be uploaded to the TBPI Picasa account within one week of the service project. In the email sent to the Historian with the Project Report and Attendance Spreadsheet, a message must also be included confirming the pictures taken have been uploaded to the TBPI Picasa account.

## Submit Paperwork

For each service project, a Project Report and Attendance Spreadsheet must be completed in the correct format and emailed to the Historian within one week of the service project. The pictures taken at the service project must also be uploaded to the TBP Picasa account within one week of the service project. Include a message in the email to the Historian with the required paperwork confirming the pictures taken have been uploaded. The Attendance Spreadsheet must also be emailed to the VP of Electees within one week of the service project.

## Project Report

For each service project, a Project Report must be filled out. The Project Report can be found on the TBPI website. Only one Word file should be filled out per service project. Do not put multiple reports in a single Word file. Do not change the format of the Word file. Simply fill in the necessary information as described in the Officer FAQ on the TBPI website. Each Word file must be saved as MMDDYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.doc or .docx). Once completed and saved in the correct format, email this Word file along with the corresponding Attendance Spreadsheet and a message confirming the pictures taken have been uploaded to the TBP Picasa account to the Historian within one week of the service project.

## Service Contacts

For every successful service project that is organized and can be repeated in the future, the organization that it was organized with should be added to the Service Contacts. For each organization to be added, provide all contact information of the person you specifically worked with in that organization. This includes name, phone number, and email. Also provide a short description of what type of activities were performed by the volunteers.

As the organizations in the Service Contacts are contacted, if there are any that we can no longer work with for any reason, such as the organization no longer exists, remove this organization from the list. If the contact person for an organization has changed, update this information for that organization.





# Social Coordinators

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*Type of Position:* Elected

*Length of Term:* 1 semester

## Duties

- ④ Organize Social Projects
  - E-Futures Sessions
  - Social Event Ideas
- ④ Announce Social Projects
- ④ Take Attendance and Pictures at Social Projects
  - Attendance Spreadsheet
  - Project Pictures
- ④ Submit Paperwork
  - Project Report

## Organize Social Events

Brainstorm and come up with ideas for social events. Before deciding on a date and time, look at the TBPI Calendar on the TBPI website to make sure the service project does not conflict with other TBPI events. Try to schedule events both during the week and during the weekend, so that all candidates and members can be able to attend social events.

Make sure there is some form of transportation available to get to the location of the social event for those who wish to attend. If necessary, ask other officers for help in setting up a carpool to the location of the social event.

## E-Futures Session

E-Futures sessions are free for Tau Beta Pi Chapters to host. Website for more information is: <http://www.tbp.org/pages/About/Programs/EF/EFmain.cfm>. This event should be scheduled by collaboration of the Vice President and Social Coordinators. E-Futures sessions are designed to teach engineers the “soft-skills” and have modules covering People Skills, Team Chartering, Group Process, Analytical Problem Solving, and Effective Presentation Skills.

The request form to host an E-Futures session can be found at:

<http://www.tbp.org/pages/About/Programs/EF/EFSession.cfm>. You must allow at least 4 to 6 weeks for scheduling, which means these events should be scheduled at the beginning of the semester.

Chapters are not limited in the number of sessions they can host, so ideally we would host one or two per semester.

Tau Beta Pi has guidelines for hosting E-Futures sessions, which can be found at:

<http://www.tbp.org/pages/About/Programs/EF/EFHostingSession.cfm>. It is often helpful to have a



sign-up for those interested in attending the E-Futures session, once it has been scheduled. If there is not enough interest by the members of the Chapter, we can invite other students at the University to attend the event (free of charge).

## Social Event Ideas

Some social events that have had a good turn-outs in the past:

- Rock Climbing (can possibly get a reduced rate if can get a head-count of number of people interested)
- Football tailgate for away games (host at someone's home to watch the game)
- Socials/Fundraisers at restaurants that will donate a portion of their profits back to Tau Beta Pi – Mochi, the Gelato Company (*coordinate with the Fundraising Coordinator for these opportunities*)
- Socials at restaurants like Swamp, Gator Dockside, Tijuana Flats
- Bowling

## Announce Social Events

Once a social event has been organized, announce the event along with the day, time, and location to the members and candidates/electees by email through the listservs. Provide any other details those interested would need to know such as directions, appropriate dress, etc. Make announcements at least 2 to 3 weeks before the scheduled social event to give members and candidates/electees sufficient notice.

Announce the social event at all TBPI meetings leading up to the day of the project. Email the Communications Chair with the announcement so they can send out the announcement over the listservs. Also email the Recording Secretary to put the event information in the upcoming meeting agenda. Do this by the deadline they place for announcements to go in the meeting agendas. Add the social event to the TBPI Calendar through Google Calendar.

## Take Attendance and Pictures at Social Events

Attend the organized social event and ensure all TBPI members and candidates/electees sign in when they arrive and sign out when they leave. The first name, last name, whether they are a member, candidate, or electee, sign in time, and sign out time of every person who attended must be recorded. This can be done on a sheet of paper with the needed information as column titles or on a laptop using the Attendance Spreadsheet provided on the TBPI website which has the correct column titles already. Either way, the necessary information for each person who attended must be placed into the Attendance Spreadsheet for that social event and emailed to the Historian and the VP of Electees in the correct format within one week of the social event.



During the social event, pictures must be taken of TBPI members and candidates/electees participating in the project. These pictures must be uploaded to the TBPI Picasa account within one week of the social event.

### **Attendance Spreadsheet**

For each social event, an Attendance Spreadsheet must be filled out. The Attendance Spreadsheet can be found on the TBPI website. Only one Excel file should be filled out per social event. Do not put the attendance from multiple events in a single Excel file. Do not change the format of the Excel file. Simply fill in the necessary information for each person who attended the social event: First name, last name, member/candidate/electee, sign in time, and sign out time. Each Excel file must be saved as MMDDYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.xls or .xlsx). Once completed and saved in the correct format, email this Excel file along with the corresponding Project Report and a message confirming the pictures taken have been uploaded to the TBPI Picasa account to the Historian within one week of the service project. The Attendance Spreadsheet must also be emailed to the VP of Electees within one week of the social event.

### **Project Pictures**

Pictures must be taken at each social event. A large amount of pictures are not necessary or wanted. The most important part is that TBPI members and candidates/electees are in the pictures and show them participating in the social event. All pictures taken must be uploaded to the TBPI Picasa account within one week of the social event. In the email sent to the Historian with the Project Report and Attendance Spreadsheet, a message must also be included confirming the pictures taken have been uploaded to the TBPI Picasa account.

### **Submit Paperwork**

For each social event, a Project Report and Attendance Spreadsheet must be completed in the correct format and emailed to the Historian within one week of the social event. The pictures taken at the social event must also be uploaded to the TBP Picasa account within one week of the social event. Include a message in the email to the Historian with the required paperwork confirming the pictures taken have been uploaded. The Attendance Spreadsheet must also be emailed to the VP of Electees within one week of the social event.

### **Project Report**

For each service project, a Project Report must be filled out. The Project Report can be found on the TBPI website. Only one Word file should be filled out per service project. Do not put multiple reports in a single Word file. Do not change the format of the Word file. Simply fill in the necessary information as described in the Officer FAQ on the TBPI website. Each Word file must be saved as MMDDYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.doc or .docx). Once completed and saved in the correct format, email this Word file along with the corresponding Attendance Spreadsheet and a message confirming the pictures taken have been uploaded to the TBP Picasa account to the Historian within one week of the service project.



# Communications Chair

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*Type of Position:* Elected

*Length of Term:* 1 semester

## Duties

- 🕒 Tau Beta Pi Communications Google Account
- 🕒 Listservs
  - Approve emails
  - Send out meeting reminder emails
  - Send out office hour cancellation emails
  - Create new listservs
- 🕒 Post Flyers
- 🕒 Model Schedule

## Tau Beta Pi Communications Google Account

Login: [TauBetaPi.FLA@gmail.com](mailto:TauBetaPi.FLA@gmail.com)

Get the password from the past Communications Coordinator.

This account is the administrator for all the listservs. DO NOT CHANGE IT! Using a unique account makes it easier to pass the responsibilities from one Communications Chair to the next.

## Listservs

Keep the five listservs up-to-date and accurate

Officers	TBPOFFICER2010-L@lists.ufl.edu
Members	TBPM2010-L@lists.ufl.edu
Active Members	TBPACTIVE-L@lists.ufl.edu
Candidates/Electees	TBPE2010-L@lists.ufl.edu
Florida Alpha Alumni	TBPALUMNI-L@lists.ufl.edu

At the beginning of each semester, the President should give you a list of officer email addresses. Erase the current emails on the officer listserv and add the new ones. The Corresponding Secretary will give you the list of email addresses for the candidates/electees listserv. The Member Coordinator will give you lists of active member and graduated member email addresses. Replace the entire active member listserv with the new list. Delete the email addresses on the graduated member list from the member listserv and add them to the alumni listserv.

Throughout the semester, you may be asked to add or delete specific addresses. After election, the candidates/electees listserv should only contain the email addresses of those candidates who were



elected. After initiation, you will need to add the initiated electees to the member listserv, but only add the ones to the active member listserv who have indicated they wish to active (the President or Member Coordinator should give you this list).

### **Approve Listserv Emails**

Officers send many emails to the listserv every day. Please read over each email they send to check for major typos or missing information. If you find any mistakes, decline the email, fix it, and resend from the Communications Gmail account. To avoid sending out too many emails, you can merge multiple emails from the same officer to the same listserv into one email (you will have to decline the email, copy and paste the messages into one email, and send it to the listserv with the Communications Gmail account).

Do NOT approve emails sent to the listserv that are not appropriate (e.g. emails from candidates who have accidentally hit “Reply All” instead of “Reply”, SPAM, etc.).

### **Send Out Meeting Reminder Emails**

There should be two reminder emails sent to the member and electee listservs before each of the five chapter meetings. The first email should be sent two days before the meeting, and the second the morning of the meeting. Include the date, time, and location, and if appropriate, the topics that will be covered at the meeting.

### **Send Out Office Hour Cancellation Emails**

Send a single email to the electee listserv with information regarding the time and date of the cancelled office hours. Include the name of the officer, the date s/he will be unavailable, and the time as well.

### **Create New Listservs**

If the President asks you to create listserv for another sub-group, use the Communications Gmail account as the administrator (don’t forget to add that listserv to this document).

#### ***Listserv Creation Request***

- This only needs to be filled out if you are creating a new listserv for some reason.
- Visit <http://lists.ufl.edu/> and click on Create New Mailing List (or something similar).
- Fill in the listserv name (this is will be the email address for the listserv, it must end in “-L”) and title (this is the name of the group of people on the listserv, like “Tau Beta Pi Officers”).
- Do NOT publicly advertise the listserv.
- Subscriptions should only be made by the list owner.
- Replies to the email should be redistributed only to the person that posted the message.
- All the mail should be filtered by an editor.
- Insert “TauBetaPi.FLA@gmail.com” as the Moderator.
- Do not archive the messages sent to the listserv.
- Insert “TauBetaPi.FLA@gmail.com” as the Owner.
- The list owner should be notified when someone subscribes to the list.



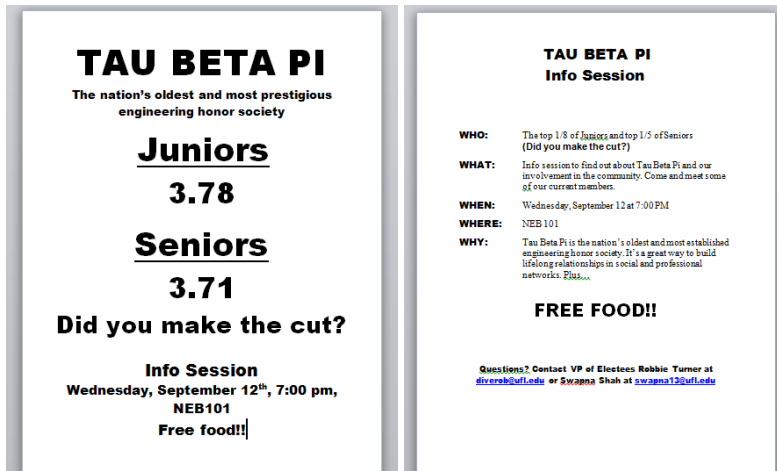
- Enter “Tau Beta Pi” as the name, enter “(352) 392-5683” as the phone number, enter “TauBetaPi.FLA@gmail.com” as the email address, and enter “Tau Beta Pi” as the organization.
- Hit Submit. You should receive an email to the Communications Gmail account when the listserv is ready for use.

## Post Flyers

It is your job to post the advertisements for our information session in the engineering buildings around campus. The flyer should include the GPA requirements for juniors, seniors, and graduate students. Most likely you will not know where the information session is yet because the registrar will not have assigned it, but include the date and time. If you cannot include the location, include the URL of our website. Talk to the President about whether food will be provided at the info session (it may or may not be in the budget that semester). Add that to the flyer if there will be since it’s a big crowd pleaser.

Any other advertising is your job as well. For example, the Pi Run requires a lot of advertising so that we do not lose money running the event.

## Sample Flyers



## Model Schedule

First week of semester	<ul style="list-style-type: none"> <li>Post flyers about TBP eligibility/Information Session</li> <li>Update all the listservs</li> </ul>
On a daily basis	<ul style="list-style-type: none"> <li>Approve emails sent to the listservs</li> </ul>
2 business days before each meeting	<ul style="list-style-type: none"> <li>Send reminder emails to electees and members</li> </ul>
Morning of each meeting	<ul style="list-style-type: none"> <li>Send short reminder emails</li> </ul>
After Election	<ul style="list-style-type: none"> <li>Delete those not elected from this listserv</li> </ul>
After initiation	<ul style="list-style-type: none"> <li>Move electees to the member listserv</li> <li>Only move those who have indicated a desire to be active to the active member listserv</li> </ul>



# Webmaster

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*Type of Position:* Elected

*Length of Term:* 1 semester

## Duties

Maintaining the Chapter website with updated news, dates, pictures and contact information

- ④ Accessing the Website
- ④ Must Be Kept Up to Date
- ④ Update Once a Semester
- ④ Update Annually
- ④ New Officers

## Maintaining Chapter Website

### Access Website

The website is written in php and can be updated using any website client. A good client that has been used in the past is FileZilla. Important information needed for updating the website:

hostname: ssh.grove.ufl.edu

port: 22

username: tbp

password: your-gatorlink-username/your-current-gatorlink-password

Only approved (registered) students have access to update the website. The President registers students who are eligible to update the website at the beginning of the Fall semester.

### Must Be Kept Up to Date

There are items that must be continually kept up-to-date during the semester:

- Announcements on the homepage
- Calendar

### Update Once a Semester

There are pages on the website that must be updated once a semester because their content changes each semester (usually updated at either at the beginning or end of the semester):

- Events
  - Meetings
  - Corporate Info Session (may need to be modified more often if necessary)
- Candidates



- Candidate Information (GPAs must be updated)
- Electee Requirements (initiation date must be updated)
- How to Join Tau Beta Pi (update all dates)

## Update Annually

There are a few updates that need to be updated once a year:

- More About Us
  - Advisors (update if necessary as chapter advisors change)
  - Constitution and Bylaws (update the title of the National Documents link)
  - Annual Reports (add the newest annual report)
  - Sponsors (modify once a year as TBPI gets new sponsors)

## New Officers

Officers and their contact information must be updated on multiple pages throughout the website; here are locations that need to be updated:

- Events
  - TEE Program (TEE Chair; the TEE Chair has access to the website and is responsible for updating the Tutoring Schedule as necessary)
  - Clock Tower Project (Clock Tower Coordinator)
  - FE Reviews (FE Review Coordinator)
  - Pi Run (Pi Run Coordinator)
  - Banquet (this has both Treasurer and Banquet Chair information)
- Candidates
  - Candidate Information
  - Electee Requirements (Treasurer email for dues)
- Members
  - Information (Member Coordinator)
  - Officers (all officers)
- Contact Us (President, GatorTRAX Coordinator, SECME Coordinators, TEE Chair, and Webmaster need to be updated)





# GatorTRAX Coordinators

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*Type of Position:* Appointed

*Length of Term:* 2 semesters (1 year)

## Duties

- Create a schedule
- Develop a Chapter Implementation Team (CIT)
- Module Overview
- Fundraising
- Reserve Rooms
- Sending Emails via listserv
  - Editing the Listserv
  - Example Email
  - MAC Users Only
- Hosting Events
- Advertise
- Update GatorTRAX Website
  - Windows Users
  - Mac Users

## Create a Schedule

DO NOT WAIT UNTIL THE LAST MINUTE! Before each semester the GatorTRAX coordinator is in charge of creating a schedule for all events. Ideally GatorTRAX has a parent module before any student events. You'll want to look out for UF sporting events taking place in the semester, holidays, SECME (spring semester only), and other UF outreach sponsored program. The University of Florida has a master calendar up for all semesters at <http://calendar.ufl.edu/>, and holidays are easy to find.

You should Eric Torres ([eric.torres@sfcollge.edu](mailto:eric.torres@sfcollge.edu)); he was a former mathematics professor who is part of the STEM circle committee. This committee is in charge of outreach programs the University of Florida and Santa Fe sponsor. You want to ask for their schedule so you don't interfere with them.

## Chapter Implementation Team (CIT)

During your information session, you want to get volunteers for your Chapter Implementation Team. This team should be composed of at least three people. The CIT will be the core of GatorTRAX; in order for it to work properly you want to delegate duties within this team. The CIT should also be composed of at least one member that will not graduate in the upcoming spring semester to assure continuity of leadership.



## Module Overview

GatorTRAX is in charge of creating modules for all events. Previous years the program would ask societies to create said modules, however, we are deviating from that. The CIT is in charge of communicating with the respective society for the type of engineering you will be presenting at your event. The society may help by providing volunteers and come up with ideas for the module, but it is not their responsibility to make the module. You may ask for their support to fund the program in return for advertising them on our website as co-host of the activity. Example modules for the events can be found at [MindSet](#) under the materials column. If you are creating a new module it is important to fill out all the forms provided on the website. Submit these forms to headquarters so that our chapter gets merit for your work.

Two versions of a module should be created for the GatorTRAX session to compensate for elementary and middle/high school students. The level of difficulty should be easy for elementary students and increase accordingly.

## Fundraising

Each year TBPI can award each chapter \$1,000 for their respective Mindset program. You must submit a grant request form <http://www.tbp.org/pages/About/Programs/K12/index.cfm> under the “forms & resources” section. One good thing about GatorTRAX is its charity status. This allows us to bring in money from outside sources. Local stores and restaurants are usually generous with donating money to educate children.

## Reserve Rooms

Go to the registrar’s website to make a reservation <https://stars.facilities.ufl.edu/class/reserve.php>. We usually reserve Weil 270, 273 and 275.

Reservations must be done during the first week of the semester. It is important to add in the comments sections that you will be working with many young children; therefore, it is required to have adjacent rooms to minimize travel between buildings. This should keep the registrar from assigning you rooms across campus.

The following image is an example of how to fill out the form:



Term:	<input type="text" value="Fall"/>
Group Affiliation:	<input type="text" value="INDUSTRIAL &amp; SYSTEMS ENGINEERING"/>
Group Name or Course # & Section:	<input type="text" value="Tau Beta Pi GatorTRAX"/>
Purpose:	<input type="text" value="K-12 engineering outreach event"/>
Adviser's Name:	<input type="text" value="Deb Mayhew"/>
Adviser's Phone:	<input type="text" value="352-392-0944"/>
Adviser's Email:	<input type="text" value="dmayh@eng.ufl.edu"/>
Requestor's Name:	<input type="text" value="Michael Durante"/>
Requestor's Phone:	<input type="text" value="239-357-5338"/>
Requestor's Email:	<input type="text" value="mdurante14@ufl.edu"/>
Room Size:	<input type="text" value="70"/>
Room Preference:	<input type="text" value="Weil 270"/>
Second Choice:	<input type="text"/>
Meeting Dates:	<input type="text" value="8/28, 9/18, 10/2, 10/23, 11/6"/>
Meeting Times:	<input type="text" value="8:45am - 12:15pm"/>
<i>Please list accurate start/end times, especially if multiple periods are needed.</i>	
Other Comments:	<input type="text" value="This outreach event is attended by a large number of young children. For their safety, we need to have adjacent rooms to avoid any long walks across campus"/>

*By submitting this request, I certify that I have read and will abide by the room reservation guidelines.*

The registrar will send you a confirmation email for the reservations. They will ask you to call them the Monday before the event to confirm the room reservation or the rooms wont be opened. On the day of the event, if no one shows up by 8:30am call UFPD and explain the situation. UFPD will send out a police officer to open the rooms for you. **YOU MUST HAVE A PRINT OUT OF THE ROOM RESERVATION!**

## Sending Emails to the ListServ

**Email:** [ufgatortrax@gmail.com](mailto:ufgatortrax@gmail.com)

**Password:** tpbmindset11

## Editing the ListServ

- 1) Go to lists.ufl.edu
- 2) Click on "Mailing List Management Interface"
- 3) Click the link to "Get a new Listserv Password"
- 4) Once you have obtained your listserv password, come back to the management interface login page, and log in to the system.



5) From here, you should just explore the interface and get a feel for how it works. You can add/remove users, change their privileges, etc.

## Example Email

Hello students, parents, and teachers!

GatorTRAX will be hosting yet another fun-filled activity this Saturday. Students be ready for a day filled with fun activities! We will be teaming up with Woman's Transportation Seminar (WTS) for our LEGO super cars!

Date: March 24th

Time: 9am - 12pm

Location: Weil 270 ([Map](#))

\*For map, please see:

<http://www.ufgatortrax.com/location.shtml>

Also, we will be asking all parents to fill out the standard once-a-semester registration form. We will have copies on hand when you arrive tomorrow, and you can fill one out when you sign your child in. Alternatively, the form is available for download at the link below. If you want to get in and out a little quicker (and help save us paper), simply print it out at home and fill it out in advance.

[http://www.ufgatortrax.com/Published\\_Docs/GatorTRAX%20Registration%20Form.pdf](http://www.ufgatortrax.com/Published_Docs/GatorTRAX%20Registration%20Form.pdf)

Thanks, and I look forward to seeing you this Saturday!!!

Luis Alvarez

GatorTRAX Coordinator

<http://www.ufgatortrax.com>

### *Note*

After sending a email to the listserv you will have to login to [ufgatortrax@gmail.com](mailto:ufgatortrax@gmail.com) and look at the folder on the left hand column called Listserv Emails. Open the email and click the link to confirm sending.

## MAC USERS ONLY

It is possible to automate all emails for GatorTRAX using the application called Automator. On the TBPI computer you will find a folder called GatorTRAX, inside this folder you will see a file called March 24,



this file can be opened by Automator. You may edit the information inside this file to write an email as you see fit. After editing the file, make sure to save it on your Mac somewhere you can easily access (Desktop would be great). On your iCal create a new event and under alert choose “open file.” This will allow you Mac to send emails automatically to the listserv without you needing to worry about it. You must have your Mail application set up with the GatorTRAX email. It is good practice to have an email sent to your personal email address as a reminder to confirm the email sent to the listserv.

## Hosting Events

The GatorTRAX coordinator should check out the key from Margie at Weil Hall the Friday before the event. This key will allow access to the GatorTRAX closet containing all the materials required for the event. Before the event starts, make sure to take out all the tables, chairs, and forms required for the event. If the parents have not filled out the semester form, they must do so while signing in the student.

They must also fill out the sign in sheet with proper information (**Authorized people to pick up the child is very important**). Separating elementary and middle school student (also high school if any) is helpful to better implement the module. A volunteer is usually given 3-4 children to work with depending on the ratio of volunteers to students. A lecture on the science and math being used should no longer than 30 minutes. The rest of the time should be spent on the hands on activities.

When the event is finishing parents can only exit the building through a designate door. This allows us to make sure the student leaves with an authorized person. Parents **must** sign out their students or their wont be allowed to leave.

## Advertise

It is very important to advertise GatorTRAX. One easy way is by sending emails to the listserv, however, we have a contact at the local school board. [Pamela Morgan](#) is the math director of K – 8 for the Alachua county school board. She can easily distribute emails to all the teachers in the area about GatorTRAX. You may want to print out flyers for GatorTRAX and she will have them sent to all students in the area.

## Update GatorTRAX Website

You are responsible for maintaining the GatorTRAX website. To edit the GatorTRAX website you have the following options.

### Windows Users

Download and open: WinSCP



*Input this information as needed*

Host name: ufgatortrax.com

Port: 21

Username: [ufgatortrax@ufgatortrax.com](mailto:ufgatortrax@ufgatortrax.com)

Password: obtain from previous GatorTRAX Coordinator

File Protocol: FTP, no encryption

Click login, and it will open the webpage for you with all files. Editing any of these files will change the respective part of the website. It is suggested to leave the code as is, and build from it.

## Mac Users

Download and open: Cyberduck

*Input this information as needed*

Host name: ufgatortrax.com

Port: 21

Username: [ufgatortrax@ufgatortrax.com](mailto:ufgatortrax@ufgatortrax.com)

Password: obtain from previous GatorTRAX Coordinator

File Protocol: FTP, no encryption

Click, login and it will open the webpage for you with all files. **Make sure to open the files using Dashcode or it will mess up the format of the website.** Editing any of these files will change the respective part of the website. It is suggested to leave the code as is, and build from it.

*\*\*All forms can be found inside GatorTRAX folder in TBPI office computer\*\**



# SECME Coordinators

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*Type of Position:* Appointed

*Length of Term:* 2 semesters (1 year)

## Duties

The SECME Coordinator duties are divided up between semester. The Fall contains the majority of the planning and the Spring is the organizing of the actual event. In the Spring semester, it is best to seek out to train members to help who may like to run for the SECME Coordinator position in the Spring Officer Election.

## Fall

- Information session with teachers
  - Meant to introduce new teachers to SECME
  - Teachers need to request funding early in the semester, so the meeting needs to be in September or October
  - Collect list of SECME Teachers from the Alachua County School Board's Science Curriculum Coordinator
    - Currently ZoEllen Warren
- Set a date for SECME
  - Usually held in March
  - Make sure there are no conflicts
    - FCAT preparations
    - Alachau County School System's spring break
    - UF's spring break
    - Various science competitions
- Hold training modules for SECME students
  - Coordinate with GatorTRAX, so that their modules are beneficial to SECME teachers
  - Example: Create a project to demonstrate the importance of traction for the wheels of a mouse trap car.
- Update SECME Rules Manual
  - Update any changes to rules
  - Update due dates for various documents
- Update SECME website
- If volunteers are available, send them to help teachers with SECME projects

## January

- First week of school, reserve the rooms
  - Several options for SECME Olympiad layouts



- Option #1: Florida Gym
      - FLG gymnasium for Mouse Trap Cars
      - FLG 2<sup>nd</sup> floor, 6 large rooms
      - Field close to FLG for Water Bottle Rockets
      - Contact College of Health and Human Performance to reserve FLG rooms and gymnasium
        - Executive Secretary: Janice Douglas
    - Option #2: Reitz Union
      - Six largest rooms
      - Grand Ballroom for Mouse Trap Cars
      - North Lawn for Water Bottle Rockets
  - Rooms get reserved by other groups very quickly, so you must reserve the rooms as soon as possible
- Set up a weekly meeting time with Engineering Student Affairs Advisor
  - Currently Stephen Roberts
- Remind teachers to submit registration forms on time once every two weeks
- Work on budget for SECME
  - Keep it small, we don't want to give anyone in the College of Engineering a reason to cut the program.
  - At the same time, make sure to order enough food, t-shirts, etc.
  - Make sure to include reservation fees for the rooms and facilities in the budget
- Send volunteers to assist teachers with SECME projects
  - Teachers may not ask directly, so be proactive. Email all teachers and ask if they need help!
  - Teachers often have weekly meetings with their SECME students, so pair a teacher with one of the volunteers who can commit to those weekly meeting times.

## February

- Make sure school send in their materials
  - School Registration Forms (should have been sent in January)
  - Student Registration Forms
  - Recycling Project
  - Mouse Trap Car Technical Report
- Make sure that facilities will be ready
  - Proper amount of chairs, tables
  - Make sure the reservations have been set in stone!
- Set up schedule of events
- Once you've solidified the number of participants (students, teachers, parents, volunteers), begin placing orders
  - T-Shirts
    - Dragonfly Graphics is our current supplier





- Obtain the design(s)
    - Get a quote from supplier, using old invoices as a reference
  - Trophies
    - The Trophy Shop is our current supplier
    - Attempt to reuse old trophies
    - Get a quote from the supplier
  - Food
    - Pizza
    - Attempt to get a discount or some sort of buy-one-get-one deal in exchange for advertising on the T-Shirts or elsewhere.
- Recruit officers and volunteers for each SECME event
  - Note: Some events require graders, which requires additional volunteers
  - Note: Contact various students groups to acquire volunteers
    - Society of Automotive Engineers (SAE)
    - Engineers Without Borders (EWB)
    - Society of Women Engineers (SWE)
    - Phi Sigma Rho (an engineering sorority)
    - National Society of Black Engineers (NSBE)
  - Mouse Trap Car
  - Egg Drop
  - Water Bottle Rocket
    - Phi Sigma Rho usually handles this, contact their president to request help
  - Math Test
  - Cerebral Challenge
  - Surprise Design
  - Recycling Competition
  - Banner
  - Scorekeeper
  - Food, Trophies, and T-Shirts
- Hold several SECME officer meetings to get everyone prepared for their positions
  - Should start having meetings about four to six weeks before SECME
  - Aim to have four meetings

## March

- Consider prizes for the winning school
  - If prizes are feasible, present them to advisor and dean
- Make sure tests are complete
- Make sure schedule is ready
- Update website
  - List of registered schools, groups
  - SECME schedule of events



- Keep in contact with teachers, especially new teachers
- Design and print a welcome pamphlet
  - Includes schedule, names of officers, locations of events, names of sponsors
- Obtain HITT remotes for cerebral challenge
  - Currently supplied by the physics department
  - Senior Teaching Laboratory Assistant, John Mocko

### **After SECME**

- Have a social with your officers!
- Order supplies for the training modules to be held in the following fall semester
- Set up a meeting with teachers and the math and science directors in the county
  - Science: ZoEllen Warren
  - Math: Pam Morgan



# TEE Chair

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*Type of Position:* Appointed

*Length of Term:* 2 semesters (1 year)

## Duties

- ④ Contact Professors
  - Key Tasks
- ④ Recruit Tutors
  - Contact
  - Responsibilities
- ④ Advertise
  - Course Website
  - Flyers
  - Announcements
- ④ Reserve Rooms
  - Recommendations
- ④ Update Website
- ④ Collect Project Reports
- ④ Continued Expansion
- ④ Model Schedule

## Contact Professors

Before the start of each semester (1-2 weeks) you should establish contact with the professor of the course in which you would like to offer tutoring. Contact information can be found through the registrar or the department website. An email template is found in the Tutoring folder, which is located on the desktop in the TBP office. In most cases it is sufficient to receive a simple statement of support from the professor; however, make yourself available to talk in person if they would like to discuss the intentions of the program in further detail.

## Key Tasks

When making contact with each professor, it is vital that you complete these 2 items:

- Provide the link for the TEE webpage (<http://grove.ufl.edu/~tbp/page.php?p=tee>) and request that the professor post it on his/her course website.
- Ask for permission to make a brief announcement at the beginning of one of the lectures to advertise the program.



## Recruit Tutors

### Contact

At the same time you are contacting professors, you should begin reaching out to fellow TBP members to serve as tutors. This can be done via email through the listserv and/or announced during the semester meetings. Ideally, you would like to have 2 tutors per subject, but 1 person will suffice. You should arrange a meeting with all the interested tutors to clearly outline their responsibilities. Also, you need to quickly establish a schedule for when the tutors would like to hold sessions. It is highly recommended that the sessions be held at a consistent day and time.

### Responsibilities

Most tutors are expected to hold weekly homework review sessions and exam review sessions when appropriate. However, this can vary from subject to subject and the decision is left to you (and possibly the tutor) to decide what is appropriate. Review material currently exists for Chemistry I, Calculus I, Physics I, and Physics II (see Continued Expansion). At the end of the semester, all tutors are expected to fill out project reports (see Project Report section).

### Advertising

A critical component of the TEE program is advertising. Poor attendance at the review sessions (mostly the HW sessions) continues to be a problem.

### Course Website

As stated earlier, it is a good idea to have the professor post the link to the TEE page on their course website.

### Flyers

In the Tutoring folder found on the desktop, there are templates for flyers that should be updated and posted outside the lecture halls of the respective classes.

### Announcement

At the beginning of the semester, you (or a representative of TBP) should make an announcement to each class. You should mention the TEE website (including time and dates) and what services will be offered. Additionally, you should emphasize that the sessions are free and open to all students, not just engineering majors. A template for the announcement is also found on the desktop.

### Reserve Rooms

The room reservation process is straightforward and is done online through the registrar. In general, you should reserve the room no later than 1 week before the event. If you reserve a room for the weekend, you may be contacted via a phone call to confirm the reservation; additionally, you should email the reservation receipt to the tutor because sometimes the rooms are locked and they need proof when



they contact UPD to open the building. The process for reserving the room is as follows (also found on desktop):

- Go to [www.registrar.ufl.edu](http://www.registrar.ufl.edu) and select Registrar Forms
- Click on Room Reservations for Student Groups
- Click on Room Request
- Fill out the form
- Use Curtis Taylor as the Advisor (subject to change)
- Room size should be ~20-25 people
- Make sure reservation times correspond to the scheduled class periods

## Recommendations

- It is easier to reserve rooms during the evening, so encourage tutors to hold sessions at night
- If possible, avoid holding sessions during weekends
- You are encouraged to reserve multiple rooms at once

## Update Website

Install Filezilla on your computer (also found on desktop). Password and website information will be emailed to you when you are added to receive access. No previous experience with website design is needed. You will be mainly responsible for adding the HW files to the tutoring folder and editing the TEE page to update the times and locations of the tutoring sessions. A template for the page is found on the desktop. The previous TEE chair should review the website with the newly elected chair and show them where the appropriate files can be found.

## Collect Project Reports

The project reports are needed for the TBP annual report. Templates as well as explicit instructions for filling out the reports are found on the desktop. You may email these out at the beginning of the semester and encourage the tutors to fill them out as the semester progresses. You should remind all tutors at least two weeks before the end of the semester to have the reports completed in a timely manner.

## Continued Expansion

The goal of the TEE program is to provide tutoring for all critical tracking courses. Review material is still needed for the following courses:

- CHM2096
- MAC2312
- MAC2313
- MAP2302



In addition to recruiting tutors, you may want to gauge interest in creating tutoring content for these courses. This can be a good opportunity for electees to earn service hours.

## Model Schedule

Within 1-2 weeks before beginning of semester	Establish contact with professors, begin recruiting tutors
Within first two weeks of school	Make in-class announcements Establish schedule for semester
Entire semester	Continue to update website
No less than 1 week of event	Make sure to reserve rooms
No less than 2 weeks before end of semester	Begin collecting project reports



# Member Coordinator

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*Type of Position:* Elected

*Length of Term:* 1 semester

## Duties

- ④ Organize Members Only Events
- ④ Announce Events
- ④ Document Events
  - Project Report
  - Attendance Sheets
- ④ Take Member Attendance at Meetings
- ④ Distribute Pins to Members
- ④ Distribute Stoles to Active Graduating Members
  - Ordering Stoles
- ④ Model Schedule

## Organize Members Only Events

Contact a venue or service organization and see if they will be willing to accommodate a student organization. Pick out possible dates and time for the event. Verify with service chairs and social chairs there is not a conflicting event on the same day as the prospective planned event. Schedule the event and find out if there is any special clothing, materials, clearance, etc. needed for the event. In case of any extra supplies needed they must be secured prior to the event.

It is strongly encouraged transportation is provided to the event. Contact other TBPI officers and willing members about carpooling.

Members are welcome to all the service events and social events as well as members only events. Member's events include but are not limited to – bowling, pizza, informational seminars, sporting events, etc. If the member is attending a TBPI paid event, the member must be considered active to obtain the TBPI member deal.

## Announce Events

Once an event has been scheduled, announce through the TBPI member's listserv the planned event. Post the event on the TBPI Google calendar as well. At the next meeting announce the event as well to any members in attendance. Make these efforts ~2 weeks prior to the event so transportation and arrangements can be made.



## Document Events

At the event be sure to take pictures or videos so TBPI has some news to post online. Attendance must be taken at the event as well. Compile the attendance list in a spreadsheet and send it to the Historian to be documented. Upload the picture to the TBPI Picasa account within one week of the event. The correct paperwork/report must also be submitted to the Historian, the format can be found on the TBPI website.

## Project Report

A project report must be filled out for every event organized, the correct format can be found online at the TBPI website. The file should be saved as MMDDYYYY – Eventname in a standard word file; it should then be emailed to the historian with the attendance spreadsheet and a message confirming the pictures have been uploaded to the TBPI Picasa account.

## Attendance Sheets

Keep an accurate spreadsheet of the active members within TBPI. Most importantly keep track of their hours through the semester so it is distinguishable who is eligible for the stoles and who is not.

## Take Member Attendance at Meetings

Member attendance must be kept in a spreadsheet and taken every meeting. This is how active distinguished members, active members, and non-active members are determined. Distinguished active members invest 10 or greater hours in the society per semester; active members invest 5 to 10 hours per semester. Anything lower than 5 hours is not considered active participation in TBPI.

## Distribute Pins to Members

If the TBPI member pins come in late for the semester, the new members may not get the pins in time before the semester is over. If this is the case, the following semester the pins will need to be distributed to the new members. Most often they will be able to come to the TBPI office hours to pick up their pin. If not be flexible.

## Distribute Stoles to Active Graduating Members

At the end of the semester make the announcement to the member's listserv that stoles are available to actively participating members. This is where the spreadsheet for active members will come in handy. If the stockpile of stoles is low, order more stoles directly from TBPI headquarters.

The stoles are lent out at a \$20 deposit. Active members will receive \$10 back while distinguished active members will get \$20 back. It is up to the coordinator to develop a pick up strategy with the members, generally on the day of graduation the seniors are very busy, so it would be wise to meet them in easy to find places.





## Ordering Stoles

If the stockpile of stoles has fewer than 15 stoles, place an order with headquarters online or through the phone to secure more stoles. A safe number to be around is 20.

## Model Schedule

- Take attendance, attend meetings, and help at service project throughout the semester.
- 1 month into the semester have all the pins returned to the new member if necessary.
- 6 weeks before graduation place order with headquarters for additional stoles if needed.
- 1-2 weeks prior to graduation begin handing out stoles to eligible seniors.
- 1-7 days after graduation collect all the stoles from the members.
- 1 week after give money earned to the TBPI treasurer.



# Alumni Coordinator

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*Type of Position:* Elected

*Length of Term:* 1 semester

## Duties

- ④ Chapter Alumni Database
- ④ Alumni Correspondence
  - Chapter Activities and Events
  - Plan Special Alumni Gatherings
  - Newsletter
- ④ Paperwork

## Chapter Alumni Database

The Alumni Coordinator is responsible for maintain the Florida Alpha Alumni Database ([TBPALUMNI-L@lists.ufl.edu](mailto:TBPALUMNI-L@lists.ufl.edu)). This is best done by sending out an email across the listserv encouraging graduating students to complete the update information page on the Chapter website (<http://grove.ufl.edu/~tbp/page.php?p=memberForms#contact>).

The Chapter can get the mailing and email addresses of all Florida Alpha alumni, but often the email addresses are GatorLink accounts that no longer exist. The Alumni Coordinator may wish to contact Headquarters about getting these mailing addresses, so the Chapter can send a post card to the alumni with a link to our website to add them on the Florida Alpha Alumni Database.

## Alumni Correspondence

### Chapter Activities and Events

Keeping the alumni well informed about the Chapter activities and events is a good way to get alumni involved. Alumni can attend all elections (but do not get a vote) and can attend initiation, if they so desire. By getting alumni involved, it will help maintain continuity of the Chapter.

### Plan Special Alumni Gatherings

The Alumni Coordinator is also responsible of planning special alumni gatherings. This can include tailgate events for football games or other celebrations. These alumni gatherings provide a good opportunity for student members to network with other Tau Bates.

### Newsletter

The Chapter Newsletter is the best way to keep alumni up-to-date about the activities and events of the Chapter. In the past, the Newsletter has been called, the Gator Bent (or Alpha Letters) and is a good way to keep people informed about events of the Chapter. Once the listserv is up-to-date, distributing



the newsletter will be much easier than in the past (and cheaper since the newsletter can be emailed out instead of sent through the mail). It is best to look to the President and Vice President for help on writing and editing the newsletter, as well as gather a team of members who would be willing to helpout with the newsletter. After the newsletter is finished, email it out to the alumni and member listservs. Also, have the Webmaster post the newsletter under the announcements on the Chapter website. The newsletter must go out at least once a semester (although once a month or every other month is preferred) and should be between 2 and 4 pages long. The template for one possible design of the newsletter can be obtained from the President's Dropbox Account. At the beginning of the semester, have the President share the folder with you. This is where all the copies of the newsletter should be saved, for future reference by other Alumni Coordinators.

## Paperwork

Like all other officers who host an event, the Alumni Coordinator must fill out the necessary paperwork for host an Alumni Social. This includes an attendance sheet for those who attended, pictures from the social, and a completed project report. These items are very important to complete, because they are used to compiled the annual Chapter Project Report that is submitted by the Chapter every June 1.

## Attendance Spreadsheet

For the Alumni Socials, an Attendance Spreadsheet must be filled out. The Attendance Spreadsheet can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Excel file. Simply fill in the necessary information for each person who attended the Alumni Social: First name, last name, member/electee/alumni, sign in time, and sign out time. Each Excel file must be saved as MMDDYYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.xls or .xlsx). Once completed and saved in the correct format, email this Excel file along with the corresponding Project Report and a message confirming the pictures taken have been uploaded to the TBPI Picasa account to the Historian within one week of the Alumni Social.

## Social Pictures

Pictures must be taken at the Alumni Social. A large amount of pictures are not necessary or wanted. The most important part is that TBPI members and candidates/electees/alumni are in the pictures and show them participating in the event. All pictures taken must be uploaded to the TBPI Picasa account within one week of the Alumni Social. In the email sent to the Historian with the Project Report and Attendance Spreadsheet, a message must also be included confirming the pictures taken have been uploaded to the TBPI Picasa account.

## Project Report

For the Alumni Social, a Project Report must be filled out. The Project Report can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Word file. Simply fill in the necessary information as described in the Officer FAQ on the TBPI website. The Word file must be saved as MMDDYYY - Eventname (e.g. a specific GatorTRAX session would be saved as



10032009 - GatorTRAX Mousetrap Cars.doc or .docx). Once completed and saved in the correct format, email this Word file along with the corresponding Attendance Spreadsheet and a message confirming the pictures taken have been uploaded to the TBP Picasa account to the Historian within one week of the Alumni Social.

## Newsletter

A Project Report must be completed for work done on the Newsletter. One Project Report may be used to describe all the work on the newsletter throughout the semester (for the date put: "Throughout the Fall Semester"). Make sure to have a list of all members/candidates/electees who helped out with the writing and editing of the newsletters.



# Fundraising Coordinator

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*Type of Position:* Elected

*Length of Term:* 1 semester

## Duties

- ④ Organize Fundraisers
- ④ Announce Fundraisers
- ④ Take Attendance and Pictures at Fundraisers
  - Attendance Sheets
  - Project Pictures
- ④ Submit Paperwork
  - Project Reports
- ④ Fundraiser Contacts
- ④ Corporate Dinner
- ④ Model Schedule
- ④ Fundraising Ideas

## Organize Fundraisers

Contact organizations that hold fundraisers and inquire about having a student organization conduct a fundraiser with them. Work with the organization to pick out possible dates and times. Before deciding on a date and time, look at the TBPI Calendar on the TBPI website to make sure the fundraiser does not conflict with other TBPI events. Find out from the organization the location of the fundraiser and any other requirements needed for the project.

Make sure there is some form of transportation available to get to the location of the fundraiser for those who wish to attend. If necessary, ask other officers for help in setting up a carpool to the location of the fundraiser.

Contact information of organizations that TBPI has worked with in the past can be found in the Fundraiser Contacts document. Do not limit the fundraisers to these organizations. Contact others and add to the Fundraiser Contacts whenever a successful fundraiser is organized that can be repeated in the future.

You can set up events (in conjunction with the social chair) at some local food industries (i.e. The Gelato Company, Mochi, etc.) which will give a portion of the money earned during the fundraiser to TBPI.

## Announce Fundraisers

Once a fundraiser has been organized, announce the project along with the day, time, and location to the members and candidates/electees by email through the listservs. Provide any other details those



interested would need to know such as directions, appropriate dress, etc. In the announcement email, request a response from those who will attend to determine if there will be enough attendees. Make announcements at least 2 to 3 weeks before the scheduled fundraisers to give members and candidates/electees sufficient notice.

Announce the fundraiser at all TBP meetings leading up to the day of the project. Email the Communications Chair with the announcement so they can put it in the meeting agenda. Do this by the deadline they place for announcements to go in the meeting agendas. Add the fundraiser to the TBP Calendar through Google Calendar.

## **Take Attendance and Pictures at Fundraisers**

Attend the organized fundraiser and ensure all TBPI members and candidates/electees sign in when they arrive and sign out when they leave. The first name, last name, whether they are a member, candidate, or electee, sign in time, and sign out time of every person who attended must be recorded. This can be done on a sheet of paper with the needed information as column titles or on a laptop using the Attendance Spreadsheet provided on the TBPI website which has the correct column titles already. Either way, the necessary information for each person who attended must be placed into the Attendance Spreadsheet for that fundraiser and emailed to the Historian and the VP of Electees in the correct format within one week of the fundraiser.

During the fundraiser, pictures must be taken of TBPI members and candidates/electees participating in the project. These pictures must be uploaded to the TBPI Picasa account within one week of the fundraiser.

### **Attendance Sheet**

For each fundraiser, an Attendance Spreadsheet must be filled out. The Attendance Spreadsheet can be found on the TBPI website. Only one Excel file should be filled out per fundraiser. Do not put the attendance from multiple fundraisers in a single Excel file. Do not change the format of the Excel file. Simply fill in the necessary information for each person who attended the fundraiser: First name, last name, member/candidate/electee, sign in time, and sign out time. Each Excel file must be saved as MMDDYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.xls or .xlsx). Once completed and saved in the correct format, email this Excel file along with the corresponding Project Report and a message confirming the pictures taken have been uploaded to the TBPI Picasa account to the Historian within one week of the fundraiser. The Attendance Spreadsheet must also be emailed to the VP of Electees within one week of the fundraiser.

### **Project Pictures**

Pictures must be taken at each fundraiser. A large amount of pictures are not necessary or wanted. The most important part is that TBPI members and candidates/electees are in the pictures and show them participating in the fundraiser. All pictures taken must be uploaded to the TBPI Picasa account within one week of the fundraiser. In the email sent to the Historian with the Project Report and Attendance



Spreadsheet, a message must also be included confirming the pictures taken have been uploaded to the TBPI Picasa account.

## Submit Paperwork

For each fundraiser, a Project Report and Attendance Spreadsheet must be completed in the correct format and emailed to the Historian within one week of the fundraiser. The pictures taken at the fundraiser must also be uploaded to the TBPI Picasa account within one week of the fundraiser. Include a message in the email to the Historian with the required paperwork confirming the pictures taken have been uploaded. The Attendance Spreadsheet must also be emailed to the VP of Electees within one week of the fundraiser.

## Project Report

For each fundraiser, a Project Report must be filled out. The Project Report can be found on the TBP website. Only one Word file should be filled out per fundraiser. Do not put multiple reports in a single Word file. Do not change the format of the Word file. Simply fill in the necessary information as described in the Officer FAQ on the TBP website. Each Word file must be saved as MMDDYYYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.doc or .docx). Once completed and saved in the correct format, email this Word file along with the corresponding Attendance Spreadsheet and a message confirming the pictures taken have been uploaded to the TBPI Picasa account to the Historian within one week of the fundraiser.

## Fundraiser Contacts

For every successful fundraiser that is organized and can be repeated in the future, the organization that it was organized with should be added to the Fundraiser Contacts. For each organization to be added, provide all contact information of the person you specifically worked with in that organization. This includes name, phone number, and email. Also provide a short description of what type of activities were performed by the volunteers.

As the organizations in the Fundraiser Contacts are contacted, if there are any that we can no longer work with for any reason, such as the organization no longer exists, remove this organization from the list. If the contact person for an organization has changed, update this information for that organization.

## College of Engineering

Contact Ms. Rebecca Hoover, [BHOOV@eng.ufl.edu](mailto:BHOOV@eng.ufl.edu), in regards to any corporate funding that may be or already is available to the engineering college. Every now and then she is able to get funding from different companies, so it's worth a try.

## MindSET Grant

Read over the information sheet from Headquarters about the MindSET grant opportunities: <http://tbp.org/pages/About/Programs/K12/MindSET%20PROGRAM%20GRANT%20Infor>



[mation%202009.pdf](#), and work with the GatorTRAX coordinator to fill out the attached form and acquire \$500 for the chapter for the semester. This will help fund the GatorTRAX events.

## Tau Beta Pi Annual Fundraisers

### Corporate Dinner

The Corporate Dinner was inspired by Georgia Alpha's (Georgia Tech's) successful Corporate Dinner in fall 2010. They shared their planning guidelines with us and in the summer of 2011, we adapted the guidelines to better fit Florida Alpha and hosted our first Corporate Dinner in fall 2011. The Corporate Dinner is coordinated by the President, Vice President, and the Fundraising Chair are responsible for organizing and hosting the Corporate Dinner. The Corporate Dinner is traditionally held in the Fall Semester, but may also be organized to host an additional dinner in the spring semester.

### Timeline

Planning must begin at the beginning of the Fall Fundraising Chair's Term.

Late April/Early May:

- Contact the UF Career Fair Staff (at the CRC) to acquire a list of corporate contacts
- Determine the exact date of the UF Career Fair
- Set a date for the Corporate Dinner – a good idea is the night before the UF Career Fair Technical Day (possible conflicts: BEC may have something that night, SWE has something the night of the Career Fair)
- Set the date for the company registration deadline three weeks before the date of the Corporate Dinner
- Develop an advertising budget from the President and Treasurer
- Decide on the donation amounts required for attendance
- Decide on the number of students per table
- Decide on prices for students attending the event
  - Use variable rates for Tau Bates, candidates, other engineering honor societies
  - In fall 2011, Tau Bates paid \$10 and Candidates paid \$15 to attend (we did not have enough companies attend to invite other engineering honor society members)

June:

- Send invitation emails to corporations

June, July, August:

- Promptly and courteously respond to inquiries from the invited corporations
- Send emails with registration instructions to interested parties
- Once donations have been confirmed, send confirmations to the donors; also reply with a brief, personal thank-you message ASAP





## July:

- Reserve the room for the dinner in a room at the Reitz (contact the Banquet Coordinator for information about reserving rooms at the Reitz – it is free of charge for Student Groups)
- Early July: re-send invitations emails to the companies who have not yet replied
- Send reminder emails with registration instructions to those who showed interest but did not donate/register
- Late July: re-send invitation emails to the companies who have not yet replied

## August:

- Make a student registration form and embed it into the Chapter's Website
- Send final reminder emails with registration instructions to companies who showed interest but have not yet donated/registered
- Send student invitation emails to all active Tau Bates and initiates
- *If enough companies have shown interest*, send student invitation emails to the officers of all other UF Engineering Honor Societies and ask them to pass on the invitation to their members
- Attend the TBPI Information Session and advertise the Corporate Dinner to candidates; help with registration on site and in person
- Finalize the Dinner Contract with the Reitz
- Monitor the registration form and send student confirmation emails to those who have registered
- Collect the resumes of the registered students and write them onto resumes CDs
- Remind students to register by sending invitation emails again
- Remind students to send resumes after being confirmed
- Acquire recruiter giveaways
- Compose and print program brochures; insert the company description and logos provided in during the registration process
- Print out name tags for each student and recruiters; on the back of the name tags, indicate the table at which the student/recruiter must sit
- Compose a seating chart based on the student majors, company requested majors, and student preferences - if there are only a couple companies in attendance, it is not necessary to develop a seating chart beforehand, it is easier to have students choose their seat for dinner
- Make posters with the logos of the firms who have donated the most money
- Order custom bags with the UF TBPI logo to give out as souvenirs (a good site to order bags at is: <http://www.4imprint.com/tag/103/Plastic-Bags/product/16043-129/Convention-Bag-12-x-9-12>)

## September:

- Register the last few students
- Ask other Tau Bates to volunteer to help on the day of the Dinner; you will definitely need help once hundreds of people need to be seated in the right location
- Go to the Corporate Dinner venue 3 hours in advance to set up tables, etc.



- Dress sharp

### *President and Vice President's Role*

The President and Vice President's roles in the organizing the Corporate Dinner should be contacting companies. The President and Vice President should generate a packet of information outlining who we are and our outreach programs we are trying to get funding for; this should be done by early May (it is probably easiest to modify an older version of the fundraising packet). The Fundraising Coordinator's job involves getting contacts, planning the event, and running the event. Reaching out the other officers is highly encouraged. Constant communication between all those involved with the Corporate Dinner plans is highly encouraged.

### *Planning Details*

- Set an advertising budget (approximately \$200 – should be enough to cover the costs of the bags and posters)
- A high estimate of the per-attendee cost of the Corporate Dinner is \$50 (Max price for dinner and venue)
  - GA-A's price – Fall 2010 – was \$50 a head
  - FL-A's price – Fall 2011 – was \$30 a head
  - By utilizing the fact that we can rent rooms at the Reitz for free, and then we only have to worry about the cost of the food.
- Plated dinners provide a more-professional/formal feeling; for FL-A's first attempt, we had those attending choose from a list of dinner options ahead of time, which helped reduce the cost
- Three levels of donation: bronze, silver, and gold
  - Bronze: \$200, 1 recruiter
  - Silver: \$400, 2 recruiters
  - Gold: \$800, 4 recruiters
- For those who would like an invoice or receipt, contact Yolanda Hankerson, she handles our Foundation Account and can generate invoices/receipts if necessary
- Respond to all corporate inquires immediately. Never leave an email unanswered for more than 24 hours. Your corporate contacts are "always" looking at their email account via Blackberrys or office computers; they will know "exactly" how long it took you to get back to them. Several representatives were very appreciative when replying within minutes of inquiries. Use your fast response time to present a serious and professional image
- Cooperate with the Banquet and Awards Coordinator in order to arrange the details for the Corporate Dinner venue
- If enough companies donate money, students from the other engineering honor societies are invited
- Be quick to send confirmations to the students who register; many will get impatient and complain that they have not yet received their confirmations
- Order the custom bags from [www.4imprint.com](http://www.4imprint.com). Call and ask for an order that is below the listed minimum production quantity if necessary. See <http://www.4imprint.com/tag/103/Plastic-Bags/product/16043-129/Convention-Bag-12-x-9-12>



- Be sure to ask for high resolution logos from each company, especially from the preferred sponsors

## Pi Run

Assist the Pi Run Coordinator with organizing and hosting the Pi Run. The biggest help the Pi Run Coordinator will need is with trying to find companies and organizations that are willing to donate supplies. Ideally, we would find free pies for the run, which larger grocery stores are more hesitant to donate food because of liabilities, but small bakery/restaurants may be more interested in donating. Also, apartment complexes are usually willing to donate shirts and sunglasses and other freebies to give to people who register for the run.

## Model Schedule

Within first 3 weeks of the start of the semester	<ul style="list-style-type: none"> <li>① Contact organizations to set up fundraisers</li> </ul>
Within weeks before organized fundraiser	<ul style="list-style-type: none"> <li>① Announce event at TBPI meetings and through listserv</li> <li>① Add fundraiser to Project Calendar</li> <li>① Reconfirm fundraiser with organization</li> </ul>
Day before fundraiser	<ul style="list-style-type: none"> <li>① Prepare necessary materials (attendance list, camera, etc.)</li> </ul>
Day of fundraiser	<ul style="list-style-type: none"> <li>① Arrive at location early</li> <li>① Wear TBPI shirt for easy identification</li> <li>① Make sure all attendees sign in/out</li> <li>① Take pictures</li> </ul>
Within a week after fundraiser	<ul style="list-style-type: none"> <li>① Complete and submit Project Report</li> <li>① Complete and submit Attendance Spreadsheet</li> <li>① Upload pictures to TBPI Picasa account</li> <li>① If applicable, add contact info to Fundraiser Contacts</li> </ul>

## TBPI Fundraising Ideas (Fall 2010)

**Pie an Officer** - Electees get to pie the officers of their choice in the face! \$1 or \$2 per pie

**Alumni** – Have an alumni dinner/event and give them the opportunity to donate money in \$10 increments to us and get their name on a plaque which they will be recognized for at the event.

**Dinner Auction** - We ask for volunteers to make a single dinner. We supply the take out containers to package them into. (Meat, Mashed Potatoes, a vegetable and roll) We pick a night to hold the auction. Everyone brings their dinners on that particular night. We arrange all dinners on a table so the people can see what they are bidding on. Our "auctioneer" then starts the bidding. Most dinners start at \$5.00 ea. You would be amazed at how much a particular dinner could go for! At our last auction, a chocolate hot fudge cake went for \$27.50!

**Bake Sale** – Sell snacks (brownies, cookies, doughnuts) to students during the school day.



**Card-O-Grams** - we all get together to make pretty simple cards for birthdays, thanks, get well, boyfriend girlfriend and sell them \$1 for basic ones, \$2 for really elaborate ones. I can make cards in bulk pretty easily.

**Electee vs. Officers vs. Alumni Sports Game** - Cans in office hours. Pledge \$2 for who you think will win or team you'd like to support.

**Lollipop Bouquets** - Lollipop Bouquets containing five lollipops: Charms, Tootsie Pops, Valentine Suckers, etc. Tissue paper is used to make the lollipops look like flowers. They are held together with a rubber band and a gift tag is attached. Sell these bouquets out of office or tabling in engineering buildings. Cheap and easy to make.



# BEC Representative

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BEC Representative

*Type of Position:* Elected

*Length of Term:* 1 semester

## Duties

- ④ Attend BEC Meetings
- ④ Engineers' Week
- ④ Paperwork

## Attend BEC Meetings

Attend BEC general body meetings and report back to the Officers and Members. The current BEC rules state that an organization can miss a MAXIMUM of 2 meetings. Attendance is taken at the beginning and end of each meeting; therefore you must be present for each roll call in order to get full attendance credit. If you are unable to attend a meeting, you may ask someone to go in your place.

## Engineers' Week

Help the E-Week Coordinator to set up the Tau Beta Pi's events during Engineers' Week (E-Week). Items include forming a team to send to the E-Bowl and setting up a small demonstration at a booth at the actual E-Week event. E-Week is BEC's main outreach event for the spring semester and the events to take place and what is required from each society will be discussed in the meetings before E-Week.

## Paperwork

Make sure that all paperwork has been submitted to Student Government and CSAI. A list of documents that are needed will be announced at the first general body meeting. BEC may also require some extra information like officer names and emails, but that will also be mentioned at the same meeting.



# Clock Tower Coordinator

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*Type of Position:* Elected

*Length of Term:* 2 semesters (1 year)

## Duties

- ④ Liaison with Faculty
- ④ Volunteers
- ④ Clock Tower Meetings
  - Design Meetings
  - Construction Meetings
- ④ Paperwork

## Liaison with Faculty

Dr. Dave Bloomquist (WEIL 265H, [dave@ce.ufl.edu](mailto:dave@ce.ufl.edu), 352-392-9537 ext. 1547) is the faculty member that knows the most about the Clock Tower Project and is the best person to look for assistance with developing clock faces and financing the project.

## Volunteers

The designing and building the Clock Tower faces will require a lot of teamwork and many volunteers. Volunteers are not limited to Tau Bates, also look for volunteers in other engineering societies (including freshman). Reaching out to these other students will help get the Clock Tower finished and build up the Tau Beta Pi reputation.

When recruiting volunteers, make sure to highlight that volunteers do not need to be in Tau Beta Pi to participate (so people can invite their friends out to help). Also, highlight that this a great experience for resumes and to talk about in interviews.

## Clock Tower Meetings

### Design Meetings

Hold meetings for volunteers to design the two additional clock tower faces. These meetings should be held at least every other week (or more often) to help make progress on the clock tower faces. Makes sure to develop CAD drawings of the clock face and generate a bill of materials to build the face.



## Construction Meetings

Once the CAD drawings of a clock face is finished (and funding for building is secured), the next stage is to begin constructing the clock face. You must contact Denis Mercier (WEIL 245, [dmerc@eng.ufl.edu](mailto:dmerc@eng.ufl.edu), 352-392-5848) when it becomes time to put place the face on the Clock Tower.

## Paperwork

For each event or meeting held to design or work on the Clock Tower face, requires an attendance spreadsheet, pictures, and project report describing the event.

## Attendance Spreadsheet

For the Clock Tower events, an Attendance Spreadsheet must be filled out. The Attendance Spreadsheet can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Excel file. Simply fill in the necessary information for each person who attended Initiation: First name, last name, member/electee, sign in time, and sign out time. Each Excel file must be saved as MMDDYYYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.xls or .xlsx). Once completed and saved in the correct format, email this Excel file along with the corresponding Project Report and a message confirming the pictures taken have been uploaded to the TBPI Picasa account to the Historian within one week of the Clock Tower events.

## Clock Tower Event Pictures

Pictures must be taken at the Clock Tower events. A large amount of pictures are not necessary or wanted. The most important part is that TBPI members and alumni are in the pictures and show them participating in the event. No pictures can be taken during the ritual, but can be taken before and after Initiation, including a picture of all the newly initiated members. All pictures taken must be uploaded to the TBPI Picasa account within one week of the Clock Tower events. In the email sent to the Historian with the Project Report and Attendance Spreadsheet, a message must also be included confirming the pictures taken have been uploaded to the TBPI Picasa account.

## Project Report

For the Clock Tower events, a Project Report must be filled out. The Project Report can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Word file. Simply fill in the necessary information as described in the Officer FAQ on the TBPI website. The Word file must be saved as MMDDYYYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.doc or .docx). Once completed and saved in the correct format, email this Word file along with the corresponding Attendance Spreadsheet and a message confirming the pictures taken have been uploaded to the TBP Picasa account to the Historian within one week of the Clock Tower events.



# Initiation Coordinator

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*Type of Position:* Elected

*Length of Term:* 1 semester

## Duties

- ④ Reserve Room
  - How to Reserve a Room
  - Information for Room Reservation
  - Checking Room Availability
- ④ Assemble Volunteers
- ④ Schedule Speaking Role Rehearsal
- ④ Inspect All Required Materials
- ④ Certificates and Keys
- ④ Initiation Night
- ④ Paperwork
  - Finalize List of Electees Inducted
  - Attendance Sheet
  - Initiation Pictures
  - Project Report
- ④ Model Schedule

## Reserve Room

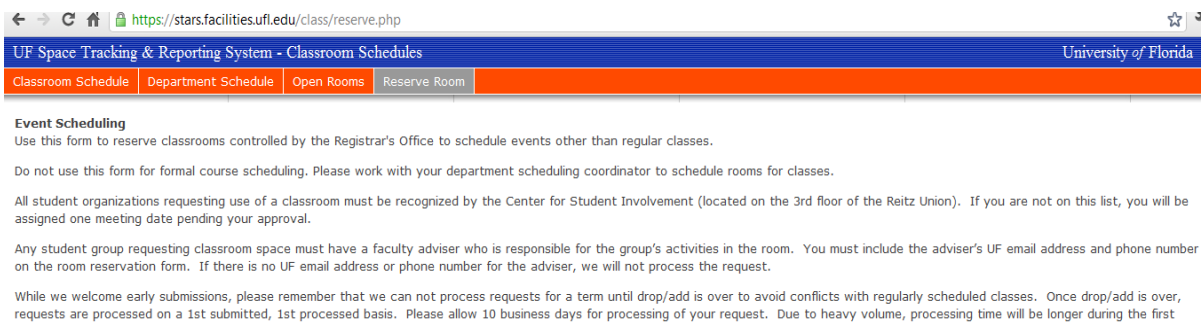
If the President has not done so already, reserve the room for the appropriate date and time.

### How to Reserve a Room

Room reservations can be found on the Registrar's website under Registrar Forms (<http://registrar.ufl.edu/forms.html>), under "Room Reservation for Student Groups".

Room Reservations for Student Groups: <http://registrar.ufl.edu/RoomsForGroups.html>

To submit a Room Request, you must log-in with your GatorLink username and password. Once you've logged-in, you will see:



← → ↻ 🏠 🔒 <https://stars.facilities.ufl.edu/class/reserve.php> ☆ 🔍

UF Space Tracking & Reporting System - Classroom Schedules University of Florida

Classroom Schedule Department Schedule Open Rooms Reserve Room

**Event Scheduling**  
Use this form to reserve classrooms controlled by the Registrar's Office to schedule events other than regular classes.  
Do not use this form for formal course scheduling. Please work with your department scheduling coordinator to schedule rooms for classes.  
All student organizations requesting use of a classroom must be recognized by the Center for Student Involvement (located on the 3rd floor of the Reitz Union). If you are not on this list, you will be assigned one meeting date pending your approval.  
Any student group requesting classroom space must have a faculty adviser who is responsible for the group's activities in the room. You must include the adviser's UF email address and phone number on the room reservation form. If there is no UF email address or phone number for the adviser, we will not process the request.  
While we welcome early submissions, please remember that we can not process requests for a term until drop/add is over to avoid conflicts with regularly scheduled classes. Once drop/add is over, requests are processed on a 1st submitted, 1st processed basis. Please allow 10 business days for processing of your request. Due to heavy volume, processing time will be longer during the first





Make sure that the "Reserve Room" tab is highlighted. Scroll down to the bottom of the page to submit the room reservation.

Term:

Group Affiliation:

Group Name or Course # & Section:

Purpose:

Adviser's Name:

Adviser's Phone:

Adviser's Email:

Requestor's Name:

Requestor's Phone:

Requestor's Email:

Room Size:

Room Preference:

Second Choice:

Meeting Dates:

Meeting Times:

*Please list accurate start/end times, especially if multiple periods are needed.*

Other Comments:

*By submitting this request, I certify that I have read and will abide by the room reservation guidelines.*

## Information for Room Reservation

Term: *Choose appropriate term*

Group Affiliation: *Student Organization*

Group Name or Course # & Section: *Tau Beta Pi*

Purpose: *Initiation*

Adviser's Name, Phone, Email: *Chief Advisor's Information*

Requestor's Name, Phone, Email: *Initiation Coordinator's Information*

Room Size: *100*

Room Preference: *WEIL 270*

Second Choice: *another room that can be made completely dark*

Meeting Dates: *give date, ex: 12/2/11*

Meeting Times: *10-E1 (this gives us 5:10pm-7:05pm)*

Comment: *We need a room that is completely dark*

## Checking Room Availability

Room availability for classrooms can be checked through this same online system, by going over to the "Classroom Schedule" tab. Choose the appropriate term, building, room, and date and the schedule for the week requested will be generated.

UF Space Tracking & Reporting System - Classroom Schedules University of Florida

Classroom Schedule **Department Schedule** Open Rooms Reserve Room

Term:  Building:  Room:  Check Ad-Hoc Date:

SCHEDULED CLASSES - Fall 2011 - E121 COMPUTER SCIENCES/ENGINEERING - Capacity 102 AD-HOC EVENTS DECEMBER 20, 2011 to JANUARY 3, 2012

Period	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
01 7:25am						
02 8:30am	SYG2430 (55)	CGS3065 (46)	SYG2430 (55)		SYG2430 (55)	

No Events Scheduled



## **Assemble List of Volunteers for Ceremony**

A minimum of 10 volunteers will be needed: 6 will perform speaking roles and the remainder will assist with various preparation tasks. A good way of find volunteers is sending out emails to both the Officer and Members Listservs.

## **Schedule Speaking Role Rehearsal**

Meet with 6 speakers, assign roles, and go over lines to ensure all are comfortable with their parts and the overall sequence of events.

## **Inspect All Required Materials**

Confirm all materials (i.e., tape, ribbon, flashlights, light bulbs, robes, etc.) are in working order and in sufficient quantity.

## **Certificates and Keys**

Confirm the Cataloger has ordered the certificates to be distributed at the end of the ceremony. The Corresponding Secretary has ordered the keys, which should also be distributed at the end of the ceremony. If any of the materials have not arrived in time for Initiation, after Initiation tell the members they can pick up with Certificates or Keys from the Tau Beta Pi Office (WEIL 278) once they have come in (they will be notified with an email once they come in).

## **Initiation Night**

The night of Initiation make sure that all volunteers arrive at least one-hour in advance to assist with set-up for initiation. Also, be sure to bring all materials from the office, including the Roll Book. When electees start arriving, have them line up outside the classroom in alphabetical order. Make sure there is a volunteer to check who is at Initiation. Certificates and keys are to be given out at the end of Initiation, after the newly initiated members have signed the Roll Book.

## **Paperwork**

### **Finalized list of electees inducted**

Prepare a list of those initiated so it may be sent to headquarters. Coordinate with the Corresponding Secretary to send in the signatures of newly initiated members in the Roll Book.

### **Attendance Spreadsheet**

For Initiation, an Attendance Spreadsheet must be filled out. The Attendance Spreadsheet can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Excel file. Simply fill in the necessary information for each person who attended Initiation: First name, last name, member/alumni (no one is an electee), sign in time, and sign out time. Each Excel file



must be saved as MMDDYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.xls or .xlsx). Once completed and saved in the correct format, email this Excel file along with the corresponding Project Report and a message confirming the pictures taken have been uploaded to the TBPI Picasa account to the Historian within one week of Initiation.

## Initiation Pictures

Pictures must be taken at Initiation. A large amount of pictures are not necessary or wanted. The most important part is that TBPI members and alumni are in the pictures and show them participating in the event. No pictures can be taken during the ritual, but can be taken before and after Initiation, including a picture of all the newly initiated members. All pictures taken must be uploaded to the TBPI Picasa account within one week of Initiation. In the email sent to the Historian with the Project Report and Attendance Spreadsheet, a message must also be included confirming the pictures taken have been uploaded to the TBPI Picasa account.

## Project Report

For Initiation, a Project Report must be filled out. The Project Report can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Word file. Simply fill in the necessary information as described in the Officer FAQ on the TBPI website. The Word file must be saved as MMDDYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.doc or .docx). Once completed and saved in the correct format, email this Word file along with the corresponding Attendance Spreadsheet and a message confirming the pictures taken have been uploaded to the TBP Picasa account to the Historian within one week of Initiation.

## Model Schedule

Each Semester	
Within first two weeks of semester	ⓑ Reserve room
1 month before initiation	ⓑ Begin recruiting volunteers for ceremony
2 weeks before initiation	ⓑ Inspect materials, contact cataloger
	ⓑ Assign all volunteer roles
1 week before initiation	ⓑ Hold rehearsal for speaking roles
	ⓑ Confirm all volunteers know their duties
1 hour before initiation	ⓑ Along with volunteers, set up room for ceremony
1 day after initiation	ⓑ Submit finalized list of those initiated



# Banquet and Awards Coordinator

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*Type of Position:* Elected

*Length of Term:* 1 semester

## Duties

- ④ Coordinate Banquet
  - Reserve location
  - Book catering
  - Publicize and send out reminders for RSVPs
  - Make sure everything gets paid for
- ④ Get speaker
  - Book speaker
  - Write thank you note and provide gift
- ④ Announce award recipients
- ④ Overall try to keep the price to approximately \$25 per person
- ④ Paperwork
- ④ Model Schedule

## Coordinate Banquet

There are two options for the banquet. You can hold it on campus in the Reitz or you can hold it off campus. My recommendation is to hold it on campus since it is much cheaper with our student organization discounts and you don't have to worry about carpooling.

Currently we hold initiation and the banquet on the Friday before reading days. If initiation starts at 6:00 pm, then the banquet generally starts at 7:15 pm.

If you are going to be on campus, you need to make your reservation ASAP since space fills up quickly. As in you may want to make the reservation before you leave for vacation after you are elected.

If you are going to be off campus, you need to make your reservation within the first few weeks of the semester to make sure that space hasn't filled up.

## Reserve Location

You will need to book a room (banquet style) and ask for a podium and microphone for the speaker.

### *On Campus*

- 1) Fill out authorized contact form for event services. The form can be found here [https://www.union.ufl.edu/Portals/0/Documents/Departments/Event%20Services/Docs/AuthorizedContactForm\\_print.pdf](https://www.union.ufl.edu/Portals/0/Documents/Departments/Event%20Services/Docs/AuthorizedContactForm_print.pdf). Select that option to "Please delete only the representative(s) listed here and replace with those listed below." Remove the contact information of the previous



banquet coordinator and replace it with your own. You will need to get the president's signature and return the form to the event services office on the 1<sup>st</sup> floor of the Reitz.

- 2) Create an account and submit a room request form on the event services site. <https://virtualems.union.ufl.edu/>. (FYI: The Useful Websites tab includes links to catering as well as room capacities.) You can look up room capacities for banquet style setup to determine what rooms you need. Check the attendance of the previous semester to get an idea.
- 3) Complete a Program Planning Permit for the Office of Student Activities. <https://www.studentinvolvement.ufl.edu/StudentOrganizations/Permitting>. If you are not on the list of officers allowed to create a permit, talk to the president to either get placed on that list or find an officer whose account you can submit through.

### *Off Campus*

You can reserve at any hotel, but keep in mind price and location. In general you want a hotel near campus to reduce travel time. I would recommend the Paramount Plaza Hotel at 2900 SW 13th Street. They have reasonable prices and are nearby. Our contact at the Paramount is Mike Bonn ([michael@paramountplaza.com](mailto:michael@paramountplaza.com)).

### **Book Catering**

In general, put in 2 or 3 extra people to your count when you have to turn in your final headcount to the catering company. Because no matter how often you tell people to get in their RSVPs, there will still be a few who e-mail you after the deadline.

Regardless of where you get the catering, make sure that there are decent vegetarian options.

### *On Campus*

You will need to order catering from Classic Fare Catering.

<https://uf.catertrax.com/index.asp?intOrderID=%2Av%2B%7F%C7&intCustomerID=%29%7D%2E%7E>. I recommend doing the Everyday Catering Italian Buffet. You should also order centerpieces from them. I would recommend 1 mirror and either 1 or 3 candles per table depending on your preference.

### *Off Campus*

Wherever you reserve the venue, they will most likely require you to order food through them. They will give you a menu. They will walk you through the process to make it a bit easier. Look at the prices and remember that you can do either a plated meal or a buffet. At this point they will also walk you through centerpieces and linen choices.

### **RSVPs**

Contact the Recording Secretary to put an item in the meeting agendas to remind membership about the banquet. Ask the webmaster to update the calendar to include the date, time, and location of the banquet. Initiates are free (their cost is included in dues) but guests cost \$25 each.

Send out reminders to RSVP for initiates as well as any guests 3 weeks before the final count is due and again 1 week before the final count is due. I recommend asking for RSVPs due a few days before you



have to give a final count to the venue. You might want to make a spreadsheet to keep track of attendees.

## Payment

What it says on the label. The payment schedule will be stated in all of your contracts. Make sure to put these in your planner to make sure you don't forget. Set up times to meet with the Treasurer to get checks for payments. Send him/her an e-mail with the amount due, who to make the check out to, and what the check is for to make it easier to make sure there are no miscommunications.

If you are on campus, event services charge after the fact. So you will have to make the payment the first month back the next semester. If you are graduating, make sure to coordinate either with the next Treasurer or Banquet Coordinator to make sure it gets paid.

You will also need to provide receipts or proof of payment of everything for the Treasurer's records.

## Speaker

### Book Speaker

You need to do this pretty early in the semester because schedules fill up very quickly. It is better to ask in person than by e-mail. The speaker can be anyone relevant to TBP or engineering. In the past we have had our TBP advisors speak as well as department heads or professors who happen to be TBP members.

Your speaker may ask what to talk about. They can talk about anything they want, but you can give them a list of possible subjects.

- Responsibilities of being an engineer and a leader
- The major engineering problems
- The importance of interdisciplinary cooperation

### Write Thank You Note and Provide Gift

Write a nice thank you note for your speaker and a gift. This gift can be a small basket of something like cocoa for a winter semester or a \$25 gift card to a restaurant.

## Announce Award Recipients

- Best Electee - Chosen by the VPs of Electees, winner must have completed the requirements for distinguished electee, not required to attend banquet.
- Best Bent - Voted on by the officers present at banquet, Best Electee is not excluded from consideration, winner must attend banquet.
- Best Member - Voted on by the officers, winner not required to attend banquet, officers not eligible.



- Best Officer - Voted on by the officers, winner not required to attend banquet, President not eligible.

Talk to the VPs of Electees to determine the best electee. Send an e-mail to officers asking them to submit votes for best member and best officer. Ask them to e-mail their votes to the president (you are eligible for best officer and so you should not be privy to those results). Best bent is determined at banquet. Either ask the Treasurer to make out the checks beforehand (best bent doesn't have a recipient yet) or tell them to coordinate to pick them up from the Treasurer and e-mail the results to the Treasurer.

Traditionally, the best officer is supposed to lead the TBP cheer. No one really knows it, though, so here it is. I recommend the traditional because, let's be honest, the modern one is totally lame.

### **THE TAU BETA PI YELL (*traditional*)**

Ammeter, Indicator, Wye Level Wye.  
Slide Rule, Dynamo, Tau Beta Pi!

### **THE TAU BETA PI YELL (*modern*)**

Calculate, Innovate, Try, Try, Try.  
Integrity, Honesty, Tau Beta Pi!

## **Paperwork**

### **Attendance Spreadsheet**

For the Banquet, an Attendance Spreadsheet must be filled out. The Attendance Spreadsheet can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Excel file. Simply fill in the necessary information for each person who attended Initiation: First name, last name, member/alumni (no one is an electee), sign in time, and sign out time. Each Excel file must be saved as MMDDYYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.xls or .xlsx). Once completed and saved in the correct format, email this Excel file along with the corresponding Project Report and a message confirming the pictures taken have been uploaded to the TBPI Picasa account to the Historian within one week of the Banquet.

### **Banquet Pictures**

Pictures must be taken at the Banquet. A large amount of pictures are not necessary or wanted. The most important part is that TBPI members and alumni are in the pictures and show them participating in the event. No pictures can be taken during the ritual, but can be taken before and after the Banquet, including a picture of all the newly initiated members. All pictures taken must be uploaded to the TBPI Picasa account within one week of the Banquet. In the email sent to the Historian with the Project Report and Attendance Spreadsheet, a message must also be included confirming the pictures taken have been uploaded to the TBPI Picasa account.



## Project Report

For the Banquet, a Project Report must be filled out. The Project Report can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Word file. Simply fill in the necessary information as described in the Officer FAQ on the TBPI website. The Word file must be saved as MMDDYYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.doc or .docx). Once completed and saved in the correct format, email this Word file along with the corresponding Attendance Spreadsheet and a message confirming the pictures taken have been uploaded to the TBP Picasa account to the Historian within one week of the Banquet.

## Model Schedule

Within 1 week of being elected	② Reserve location if you plan on holding the banquet in the Reitz
Within first three weeks of school	② Reserve location ② Book speaker ② Place preliminary order with catering
Week 4	② Submit program planning permit
No less than 4 weeks before event	② Meet with event services to go over room setup
3 weeks before RSVPs are due	② Send out first reminder for RSVPs to officer, electee, and member listservs
1 week before RSVPs are due	② Send out final reminder for RSVPs to officer, electee, and member listservs
No less than 2 weeks before event	② Obtain program planning permit signatures





# FE Review Coordinator

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*Type of Position:* Elected

*Length of Term:* 1 semester

## Duties

- ④ Recruit Professors
- ④ Reserve Rooms
- ④ Create Schedule for TBPI Website
- ④ Advertise
  - College of Engineering Weekly Update
- ④ Attend Reviews
  - Print materials requested by Professors
  - Attend reviews to check in and collect money from attendees
- ④ Thank Professors
- ④ Templates
- ④ Paperwork

## Recruit Professors

DO NOT WAIT UNTIL THE LAST MINUTE! Professors have busy schedules. Also, Chi Epsilon runs their discipline specific reviews that you will not want to conflict with. So if you get your dates in first you have less to worry about. You should contact professors during the first and second weeks of school. If you can do this in person, all the better. Professors will forget or ignore e-mails. We have a review book that you can offer if the professors would like to use it.

Also, send a reminder e-mail to the professor the day before the review he or she will be leading.

We generally have reviews on Tuesdays and Thursdays from 6:15 – 8:10 pm. You want the reviews to end so that there is one empty week before the exam. You should have approximately 8-10 reviews per semester. Subjects are those covered by the FE.

- Mathematics and Statistics
- Circuits
- Statics
- Dynamics
- Mechanics of Materials
- Chemistry
- Thermodynamics
- Fluids
- Materials



- Engineering Economy

With this guideline you should also receive a document with a list of professors who have worked with us in the past. Please keep it up to date so we do not try to contact retired professors or those who have asked us not to.

## Reserve Rooms

Go to the registrar's website to make a reservation <http://registrar.ufl.edu/RoomsForGroups.html>. I recommend rooms with at least 50 people and access to a computer/projector. Good rooms are NPB 1002 and LIT 101. You can review sizes and schedules on the website. Currently our chief advisor is Dr. Curtis Taylor, so you would put his information in the advisor slot.

## Create Schedule for TBPi Website

Ask the webmaster to update the FE Review website and TBP Calendar to include Date, Room, Topic, Professor, and Time.

## Advertise

With this guide you should receive a document for an advertisement flyer. You should hang a few of these in well-traveled places.

You should also submit your announcement to go out in the newsletter for This Week in the College of Engineering <http://www.eng.ufl.edu/students/career-resources/coe-update-form>. This needs to be put in by **“no later than the Thursday before the update in which the event is to appear. Update notices are sent out on Wednesdays.”** I recommend submitting the announcement as a repeating event as soon as possible with a link to the website for information on individual reviews.

## College of Engineering Weekly Update

Beginning DATE, Tau Beta Pi will be hosting professor-led FE Reviews. Each review will last from 6:15 pm – 8:10 pm and will cover a different subject. There will be approximately 8 sessions this semester covering topics such as LIST TOPICS COVERED.

Please [visit our website](#) for more information.



## Attend Reviews

Arrive about 10 minutes early to have a sign in and collect money. Talk with the Treasurer to determine in advance what type of payment is acceptable. TBP members pay \$10 and non-members pay \$40. We have had comments about this before, so you may discuss with the Treasurer and President to offer a rate of \$2 per review for members and \$5 per review for non-members up to a maximum of \$10 and \$40 respectively. This will allow us to take advantage of students who wish to come to specific reviews as well as those who come to all.

## Thank the Professors

Purchase thank you cards and \$40-\$50 gift cards to local restaurants (ex: Outback, Chili's etc.) and give to the professor immediately following the review they teach

## Templates

### E-mail to Professor

Dr. NAME,

My name is YOUR NAME and I am the Tau Beta Pi FE Review Coordinator for this semester. Every semester TBP organizes professor-led FE reviews for the general sections of the exam. Would you be interested in volunteering to lead a review for SUBJECT? We have a book with review guidelines and practice problems to help. The reviews run from 6:15 - 8:10 on Tuesday and Thursday evenings from START DATE to END DATE.

I am able to meet you in your office if you would prefer and am willing to offer assistance in any way. Please let me know whether or not you would be interested in participating.

Thank you,

YOUR NAME

Tau Beta Pi FE Review Coordinator

PHONE NUMBER



## Paperwork

For each FE Review, an attendance spreadsheet and project report must be completed for each event.

### Attendance Spreadsheet

For each FE Review, an Attendance Spreadsheet must be filled out. The Attendance Spreadsheet can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Excel file. Simply fill in the necessary information for each person who attended Initiation: First name, last name, member/electee, sign in time, and sign out time. Each Excel file must be saved as MMDDYYYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.xls or .xlsx). Once completed and saved in the correct format, email this Excel file along with the corresponding Project Report and a message confirming the pictures taken have been uploaded to the TBPI Picasa account to the Historian within one week of each FE Review.

### Banquet Pictures

Pictures must be taken at each FE Review. A large amount of pictures are not necessary or wanted. The most important part is that TBPI members and alumni are in the pictures and show them participating in the event. No pictures can be taken during the ritual, but can be taken before and after each FE Review, including a picture of all the newly initiated members. All pictures taken must be uploaded to the TBPI Picasa account within one week of each FE Review. In the email sent to the Historian with the Project Report and Attendance Spreadsheet, a message must also be included confirming the pictures taken have been uploaded to the TBPI Picasa account.

### Project Report

For each FE Review, a Project Report must be filled out. The Project Report can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Word file. Simply fill in the necessary information as described in the Officer FAQ on the TBPI website. The Word file must be saved as MMDDYYYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.doc or .docx). Once completed and saved in the correct format, email this Word file along with the corresponding Attendance Spreadsheet and a message confirming the pictures taken have been uploaded to the TBP Picasa account to the Historian within one week of each FE Review.



# E-Week Representative

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*Type of Position:* Elected

*Length of Term:* 2 semesters (1 year)

## Duties

- ④ Represent Tau Beta Pi during Engineers' Week
- ④ Organize Table at the Engineering Fair
- ④ Organize Team to Send to the E-Bowl
- ④ Paperwork
- ④ Schedule

## Represent Tau Beta Pi during Engineers' Week

The E-Week Representative is responsible for representing Tau Beta Pi during the Benton Engineering Council's Engineers' Week (E-Week) that takes place each spring. This is a great opportunity for Tau Beta Pi to show the rest of the engineering community who we are and why we are such a great organization.

## Organize Table at the Engineering Fair

Operating a table at the Engineering Fair with the goals of introducing various aspects of the engineering field to the visiting students is one primary responsibility of the E-week coordinator. Typically the table consists of two activities for the students to participate in. Many of the supplies for these activities are in the TBPI office.

Activities:

- An aluminum foil boat competition is set up using a large tub of water and a 1 ft<sup>2</sup> sheet of aluminum foil for each participant. Participants are allowed to fold the paper to support the maximum amount of pennies based on their intuition. Pennies are incrementally dropped in until the boat sinks. Candy is awarded for participation, and a high score list is kept and displayed.
- A second event consists of a bridge building competition where students are allowed to fold one sheet of computer paper to form a bridge that will support the most pennies. Candy is awarded for participation, and a high score list is kept and displayed.
- In addition, posters will be required for the front of the table to advertise our organization and the two activities.
- 4-6 People will be required to operate the booth smoothly.



## Organize Team to Send to the E-Bowl

The E-Week Representative is also responsible for organizing a team to participate in the E-Bowl. The Information about the E-bowl can be found on the E-Bowl website (<http://www.ufbec.org/eweek/Default.aspx>) and procedures may change, but historically the following has been required.

- A four person team will need to be organized to participate in a jeopardy style competition. We typically do very well in this event because we have members from all different fields of engineering and it is best to have a diversified team.
- A preliminary round will first be conducted and is structured as a written test. Four final teams will be selected to go to the actual competition.
- The actual competition will be jeopardy style.

## Paperwork

The paperwork required by the E-Week Representative is registering for all E-Week activities. The other paperwork required in completing two Project Reports (along with pictures and attendance spreadsheets), one for TBPI's E-Fair Table and one for the E-Bowl.

## Attendance Spreadsheet

For each E-Week Event, an Attendance Spreadsheet must be filled out. The Attendance Spreadsheet can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Excel file. Simply fill in the necessary information for each person who attended Initiation: First name, last name, member/electee, sign in time, and sign out time. Each Excel file must be saved as MMDDYYYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.xls or .xlsx). Once completed and saved in the correct format, email this Excel file along with the corresponding Project Report and a message confirming the pictures taken have been uploaded to the TBPI Picasa account to the Historian within one week of each E-Week Event.

## Banquet Pictures

Pictures must be taken at each E-Week Event. A large amount of pictures are not necessary or wanted. The most important part is that TBPI members and alumni are in the pictures and show them participating in the event. No pictures can be taken during the ritual, but can be taken before and after each E-Week Event, including a picture of all the newly initiated members. All pictures taken must be uploaded to the TBPI Picasa account within one week of the E-Week Event. In the email sent to the Historian with the Project Report and Attendance Spreadsheet, a message must also be included confirming the pictures taken have been uploaded to the TBPI Picasa account.

## Project Report

For each E-Week Event, a Project Report must be filled out. The Project Report can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Word file. Simply fill in the necessary information as described in the Officer FAQ on the TBPI website. The Word file must be saved as MMDDYYYY - Eventname (e.g. a specific GatorTRAX session would be



saved as 10032009 - GatorTRAX Mousetrap Cars.doc or .docx). Once completed and saved in the correct format, email this Word file along with the corresponding Attendance Spreadsheet and a message confirming the pictures taken have been uploaded to the TBP Picasa account to the Historian within one week of each E-Week Event.

## **Schedule**

The schedule for the events can be found on the Benton Engineering Council E-Week website:  
<http://www.ufbec.org/eweek/Default.aspx>.



# Pi Run Coordinator

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*Type of Position:* Elected

*Length of Term:* 1 semester

## Duties

- ④ Permit for Pi Run
  - Event Permit
  - Program Planning Form
  - Rec Sports Reservation Form
  - Food Request Form
  - Liability Waiver Form
- ④ Advertisement
- ④ Find Companies and Organizations Who Are Willing to Donate Supplies
- ④ Contact UPD Before the Run
- ④ Set Up and Attend the Pi Run
- ④ Tau Beta Pi Paperwork
- ④ Model Schedule

## Permit for the Pi Run

Obtaining a permit for the Pi Run is done through the Center for Student Activities and Involvement (CSAI) on the third floor of the Reitz Union. Since the Pi Run is in the Spring, the permit should be filled out in the fall to allow for adequate planning time. The president has to give all officers permission to permit for Tau Beta Pi. The permit is submitted online and can be accessed at [www.union.ufl.edu/involvement](http://www.union.ufl.edu/involvement) by navigating to Program Planning/Permit under Student Organizations. There will be a drop down box with various organizations. Select Tau Beta Pi and follow the instructions on the screen. If an officer has never permitted before he/she will have to complete a brief tutorial. The run will have to end by 10:00 am, but the area for the start and stop point can be reserved for longer. Remember to take into account setup and cleanup when specifying times. Lake Alice Field cannot be used as a starting/stopping point. Sports and Recreation reserves that as a playing field only. After submitting the permit online, check with the Center for Student Activities to make sure that the appropriate person views the permit, and to select a 5K route. The Center has pre-approved routes. The person who is responsible for organizing 5K's will most likely change every few years, but the CSAI will be able to schedule an appointment or give the appropriate email address/phone number. Once the permit has been submitted online and is under initial review it will appear on the Program Planning/Permit page along with the other necessary paperwork. This must be filled out and all appropriate signatures must be obtained no later than two weeks before the event.





## **Event Permit**

The event permit described above is the first piece of paperwork that needs to be filled out. It is completely online and comes with step by instructions. Follow the tutorial on the CSAI website, and it will describe each area of the permit. Approval will need to be obtained from Rec Sports to Reserve a field for the start/stop point. After the permit has been reviewed links to the different forms will appear. They are at a minimum the Program Planning Form, a Food Request Form, a Liability Waiver Form, and a Rec Sports Reservation form.

## **Program Planning Form**

This is the master form for the event. At the bottom it has lines with all of the signatures that must be obtained to approve the event. UPD and Risk Management/Environmental Health and Safety will sign the form electronically. UPD will not sign until billing information has been sent to them. Rec Sports will not sign until after the Rec Sports Reservation has been physically brought to their office.

## **Rec Sports Reservation Form**

This form must be filled out to reserve any Rec Sports facility. This form must be filled out and a hard copy must be taken to the Rec Sports office at Southwest Recreation Center. Be sure to fill this out and turn it in as soon as it becomes available. Rec Sports grants reservations based on the order they receive forms.

## **Food Request Form**

Any organization on campus that will serve food from an outside vendor must complete a food request form for each vendor supplying the food. This form must be filled out and turned into the CSAI. This form cannot be filled out until all food donors have been secured. The form has to be signed by them. One must be completed for each vendor.

## **Liability Waiver Form**

This form must be printed out and taken to the event. Every participant must sign the Liability waiver before they can participate in the run. Be sure to print out enough pages so that every participant can sign it.

## **Advertisements**

Begin advertising for the run at least 2-3 months before the event. It is best to make fliers. Make sure to check with the treasurer and obtain approval before spending any money. Also coordinate with the webmaster to update the website. Begin selling tickets for the run when advertising begins.

## **Find Companies and Organizations Who Are Willing To Donate Supplies**

Trying to find free pies for the run can be an arduous task. Usually larger grocery stores are more hesitant to donate food because liabilities. It is best to find a small bakery/restaurant and ask if they would be interested in donating pies.



Apartment complexes are usually willing to donate shirts and sunglasses and other freebies to give to people who register for the run. If there is not a list of contacts of companies who have donated in the past it will be necessary to start from scratch. Be sure to add to any existing list of contacts so that future Pi Run coordinators will know who to go to the next year.

## Contact UPD Before the Run

Be sure to contact UPD and confirm the day that Tau Beta Pi will be billed. It is university policy that UPD officers supervise all runs and the cost is usually around \$300. With proper planning and solicitation of donors, this will be the only expense.

## Set Up and Attend the Pi Run

Place tables and chairs at the start and stop point. There will need to be a check-in station and there will need to be a table for awards, pies, and other food. Remember to have a sign in sheet at the run. Take pictures or coordinate with the historian to take pictures at the event. Remember the sign-in sheet and project report must be emailed to the VP of electees within one week of the event. Always remember to leave the area as you found it or Tau Beta Pi can incur charges from the school.

## Paperwork

The paperwork required by the E-Week Representative is registering for all E-Week activities. The other paperwork required in completing two Project Reports (along with pictures and attendance spreadsheets), one for TBPI's E-Fair Table and one for the E-Bowl.

## Attendance Spreadsheet

For the Pi Run, an Attendance Spreadsheet must be filled out. The Attendance Spreadsheet can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Excel file. Simply fill in the necessary information for each person who attended Initiation: First name, last name, member/electee, sign in time, and sign out time. Each Excel file must be saved as MMDDYYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.xls or .xlsx). Once completed and saved in the correct format, email this Excel file along with the corresponding Project Report and a message confirming the pictures taken have been uploaded to the TBPI Picasa account to the Historian within one week of the Pi Run.

## Banquet Pictures

Pictures must be taken at the Pi Run. A large amount of pictures are not necessary or wanted. The most important part is that TBPI members and alumni are in the pictures and show them participating in the event. No pictures can be taken during the ritual, but can be taken before and after the Pi Run, including a picture of all the newly initiated members. All pictures taken must be uploaded to the TBPI Picasa account within one week of the Pi Run. In the email sent to the Historian with the Project Report and Attendance Spreadsheet, a message must also be included confirming the pictures taken have been uploaded to the TBPI Picasa account.



## Project Report

For the Pi Run, a Project Report must be filled out. The Project Report can be found on the TBPI website (<http://grove.ufl.edu/~tbp/page.php?p=officerFaq>). Do not change the format of the Word file. Simply fill in the necessary information as described in the Officer FAQ on the TBPI website. The Word file must be saved as MMDDYYYY - Eventname (e.g. a specific GatorTRAX session would be saved as 10032009 - GatorTRAX Mousetrap Cars.doc or .docx). Once completed and saved in the correct format, email this Word file along with the corresponding Attendance Spreadsheet and a message confirming the pictures taken have been uploaded to the TBP Picasa account to the Historian within one week of the Pi Run.

## Model Schedule

### First Week of Fall Semester

Obtain permission to permit for Tau Beta Pi from the president and fill out the online permit. Call the CSAI and ask who is responsible for organizing and reviewing 5K permits and make an appointment with this person. Select the route.

### First Month (September) of Fall Semester

The permit should be approved and all the paperwork for the Pi Run should be made available within the first month. Once it has been approved the first thing to do is fill out and turn in the Rec Sports Reservation form. Once this has been done contact UPD if they have not made contact first and let them know Tau Beta Pi is having a Pi Run. They should have received the permit for approval. If not the permit can be accessed from the CSAI website as described above and another copy can be emailed. Give UPD Tau Beta Pi's billing information and they will approve the 5K. UPD should not bill Tau Beta until after the run.

### Second Month (October) through December of the Fall Semester

Begin Creating advertising for the run. Secure a printing company to print fliers. Create a logo and slogan (something that can be printed on a flier or T-shirt). Prepare a letter to give to potential donors explaining what Tau Beta Pi is and what the Pi Run is.

### First Month of the Spring Semester (January)

Begin advertising for the Pi Run and begin ticket sales. During the months leading up to the Pi Run solicit different apartment complexes and bakeries for t-shirts, sunglasses, water bottles, and pies. The t-shirts, sunglasses and other merchandise are to give to people who participate in the run. Usually companies are willing to donate free items like this as they can print they logo on it. Be sure to fill out all Food Request Forms. It is best to take them in case vendors decide the first time they are asked that will donate food.

### Two Weeks Before the Run

By this time all paperwork should have been turned in. All Food Request forms need to have been submitted as well. After this point it is too late to turn in anymore paperwork.

