Chapter Start-up Guidelines

Procedure for creating

a new Sigma Theta Mu chapter

OCTOBER 2015

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summary and overview

What is in this package?

# Introduction

This package provides guidance, suggestions, and instructions for persons interested in forming a Sigma Theta Mu chapter. There are three recognized phases in the process of becoming a fully chartered chapter: pre-start-up, start-up, and emerging. The following table describes a typical chapter formation process.

|  | **Description** | **Phase** |
| --- | --- | --- |
|  | Determine need and viability of new Sigma Theta Mu chapter | Pre-start-up |
|  | Generate interest from students and faculty members | Pre-start-up |
|  | Identify a “core team” of 5-6 persons | Start-up |
|  | Hold an informational meeting to introduce Sigma Theta Mu to the institution | Start-up |
|  | Hold an organizational meeting to elect interim officers and approve constitution | Emerging |
|  | Grow the chapter and petition for Sigma Theta Mu Charter | Emerging |
|  | Receive charter from Sigma Theta Mu International Society | Chartered |

Each phase is associated with a set of activities. A consequence of stepping through the process is an increase in the number of potential Sigma Theta Mu members affiliated with the chapter. Sigma Theta Mu considers a core group that does not have local officers and local constitution a “Start-up Chapter,” and requires local officers and constitution approved under the rules of the local academic institution as an “Emerging Chapter.” A Chapter is ”Chartered” when it petitions to the International Society and the Board of Directors of the International Society votes to approve its petition and directs the Society Secretary to issue a charter . At a minimum, a chartered chapter should have a faculty advisor and officers to retain its charter.

A frequently asked question is, “How long does it take to start a chapter?” Fortunately, the answer is, “It depends.” There is no pressure to hurry through the process. On the other hand, a firmly committed team can proceed at their own pace and is not hampered by bureaucracy or other hindrances. This document addresses each of the start-up phase and the critical steps that should occur within each phase. Many resources that are available to the chapter leadership for the actual management of a chapter are also available to start-up chapters.

Suggestions to improve the content and presentation of this material are welcome and should be directed to Secretary of Sigma Theta Mu. Sigma Theta Mu maintains all contact information on the website at [www.SigmaThetaMu.org](http://www.INCOSE.org).

Creating a new chapter

Activities for starting a chapter

# Determine need and viability of new Sigma Theta Mu chapter

If you are presently in an area that does not have a Sigma Theta Mu Chapter nearby, you may be wondering whether you could establish a new Chapter. Sigma Theta Mu offers the following guidelines to identify suitable locations for new Chapters.

* Is there program of study in systems engineering or a systems-related field at your institution?

Any college or university that offers at least one curriculum or program of study leading to a baccalaureate or graduate degree in systems engineering or a systems-related field may submit an petition to the Board of Directors of Sigma Theta Mu to establish a chapter. Any such baccalaureate degree(s) must be accredited by ABET or by the equivalent engineering accrediting body if the college or university is not located in the United States.

* Is there a group of potential Sigma Theta Mu members who will derive benefit from the creation of a new chapter?

It is essential that there is a faculty member who willing to help organize the chapter, which means that the faculty member is willing to petition the Society to charter the chapter. The faculty member should be a member of Sigma Theta Mu, and if not, the faculty must be willing to become a member of Sigma Theta Mu.

It is helpful if at least five persons agree on the need for a chapter and are motivated to work together to establish and maintain a chapter. One of these five should be a faculty member who is a member of the Society, or is willing to become a member, and who is willing to serve as the faculty advisor. The faculty member who is the organizer and applies for the charter need not be the same faculty member who serves as the advisor. This small team usually forms the “core team” of individuals with the time, energy, and conviction to create a chapter.

Need is often determined based on shared interests among the group. Viability is dependent on the potential to identify students and faculty at the institution who would benefit from Sigma Theta Mu and who are willing to join the organization.

**Summary:** There are three necessary ingredients for founding and sustaining a new Chapter:

1. a population of systems-related students,
2. supportive faculty, and
3. a core group of potential leaders.

If any of these critical elements are missing, it may be better to participate in the activities of existing Chapters in your region through such means as e-mail, newsletters, and attendance at special events and meetings. It may be possible to establish virtual meeting capabilities that will facilitate long-distance attendance.

# Generate interest from individuals and Sponsors

An initial group may come together with the belief that the necessary ingredients for a new chapter are available. It is then advisable to contact the Sigma Theta Mu international society to conduct some research. Membership rosters are available from Sigma Theta Mu, and these can be used to determine how many current Sigma Theta Mu members are affiliated with the institution, which may include alumni, or reside in the geographic vicinity of the institution.

Another excellent resource are sponsors who can provide financial or in-kind resources to the chapter during its start-up phase and beyond. Sponsors might be academic deans, department heads, and the dean of students. Alumni and their employers, local companies, and local government agencies may also be interested in supporting the chapter. Alumni from your institution who graduated from the programs from which you will be drawing membership may be quite interested in helping. Sigma Theta Mu has provisions for granting membership in the Society to very supportive alumni who are have the appropriate qualifications. Do not hesitate to contact alumni and invite them to help with establishing your chapter. If you have very supportive alumni who are qualified to be members of Sigma Theta Mu, you should be consider nominating them for election to membership to your Chapter. Companies that have significantly supported INCOSE by becoming Corporate Members. Representatives from each company comprise the INCOSE Corporate Advisory Board (CAB). These CAB representatives may provide contact information about the managers of local divisions of their companies. However, since the priorities of local divisions vary widely, do not assume automatic support for a local Chapter of Sigma Theta Mu. Moreover, do not overlook smaller companies who can be as supportive as large firms if their business interests are aligned with the interest of Sigma Theta Mu.

**Build the “core team” -** From the initial list of local resources, build a “core team” of potential Chapter leaders. The most effective team size is 5-6 people. This is the team that will work together to create the chapter. It is important that the core team be able to meet for planning and coordination on a regular basis. Meetings may occur via face to face, via telephone conference calls, videoconference calls, etc. Sigma Theta Mu expects that each member of the core team will become a Sigma Theta Mu member. It is also highly useful if members of the core team come from different academic departments and backgrounds.

**Summary:** Conditions and people are subject to change; hence, Sigma Theta Mu recommends that a new chapter not necessarily be dependent on the people and support of a single academic program. Attracting members from a variety of systems-related programs may be a good basis for a stable Sigma Theta Mu Chapter. The core team should be aware that the formation period and first year are the most challenging, and having both time and supportive faculty members are critical success factors. Provided the basic ingredients are in place, a core team can rely on the Sigma Theta Mu organization to support and encourage their initiatives. See appendix 1 for a listing of Sigma Theta Mu resources helpful during new chapter formation.

# Hold an informational meeting

The core team is now ready to plan and announce one or more Informational Meetings. The purpose of these meetings is to introduce Sigma Theta Mu to the potential members of a new Chapter. This may be the first opportunity to enlist the help of local organizations as hosts for the meeting(s).

The Sigma Theta Mu Central Office can provide information and handouts, brochures, lists of benefits, posters, and other information. Arrange to get these in time for your meeting(s). The Sigma Theta Mu website is a good source for briefing charts and other chapter startup materials, such as this guide.

With the support of the faculty members and university or college administrators, you may be able to use their facilities to hold an Informational Meeting. If more than one academic unit offers to host such a meeting, or if you have concentrations of interested people in more than one academic unit, you may want to have more than one meeting for the convenience of your audiences. Conducting these meetings is one reason you need a core team from the beginning; it is extremely difficult for a single person to plan a series of meetings and follow through.

Informational Meetings do not have to be elaborate. They should include a few basic components:

1. an introduction to the core team;
2. a brief history of Sigma Theta Mu;
3. a description of Sigma Theta Mu and its organization,
4. the benefits of membership,
5. a description of typical activities conducted by Sigma Theta Mu chapters,
6. and, the benefits of having a local Chapter at your institution.

One technique that works well is to ask Sigma Theta Mu members present to tell the group how they became interested in Sigma Theta Mu and why they are a member.

The primary goal of Informational Meetings is gathering information from your audience. The core team needs to identify potential volunteers and any areas of interest that will determine the topics for future meeting content. An effective mechanism is a simple survey; such as the sample provided in appendix 2.

The secondary goal is to recruit potential candidates to become new members. Request those interested in membership to indicate their interest.

Close the meeting by promising that you will get back to everyone on future activities as soon as your team has had the opportunity to review the results of the Informational Meetings. Be sure you have collected contact information (e-mail is particularly useful) so that you can build a robust contact list. Even if not all of these people join Sigma Theta Mu immediately or are eligible to join, they may still attend meetings and join eventually.

**Summary:** Remember that having a core is essential to chartering as a Sigma Theta Mu Start-up Chapter. This recognition will include a listing on the Sigma Theta Mu website Chapters page as a Start-Up Chapter, with the contact information for a member of the core team. This will allow visitors to the site to be aware of the potential formation of the new chapter, and make inquiries.

# Create The Chapter Constitution and a Chapter Petition

Analyze the results of your Informational Meeting(s) to determine the level of interest of the students and faculty in establishing a Sigma Theta Mu Chapter. After gaining consensus on the results with your core team and deciding to proceed, share them with the Society Secretary who may be able to assist in coordinating advisory meetings with leaders of established Chapters at other comparable institutions.

At this point, will complete the needed steps to prepare the constitution (the constitution may be called the bylaws at your institution and Sigma Theta Mu will accept what is required locally) of the local chapter. The constitution must be consistent with the International Society’s constitution and approved according to rules of the university or college. The petition to establish a chapter will be submitted by a faculty member who is a member of the Society or by any group of eligible students with the endorsement of such a faculty member. Such petitions must be accompanied by the approval, in writing, of an administrative officer of the college or university.

**Summary:** Creation of these documents heralds the final phase in the transition to becoming a chartered Sigma Theta Mu Chapter.

# Hold an organizational meeting

The decisions made in this meeting are used to complete the Chapter Charter Petition discussed in the final step.

Select a convenient site and time for the Organizational Meeting. As with the earlier Informational Meetings, finding a host for the location and light refreshment will make the meeting more attractive to potential members. Establish a procedure for publicizing this and future meetings (e-mail if possible, postal mail or telephone if not.). The faculty members who are engaged with the core team are responsible for reviewing the scholastic records of all students to determine which students are eligible for membership in the Society. The core team and the faculty member also should determine if there are any alumni members who are to be nominated for membership. Only those who are eligible for membership are invited to the Organizational Meeting. One source of invitees is the attendees from the Informational Meetings. Maintaining the list of members, potential members and other contacts will become the primary duty of the Secretary of the local Chapter.

Prepare an appealing program for the meeting and distribute it with invitations. This meeting should not only introduce Sigma Theta Mu, but also give people a preview of what they can expect from attending future local meetings. Select a featured speaker for the meeting addressing a Systems topic that will have a broad appeal. A sample agenda could include:

1. Welcome
2. Introduction and Overview of Sigma Theta Mu
3. Report on the process for establishing a new chapter
4. Election of the Nominees to Membership in the Local Chapter by those in attendance
5. Approval of Constitution
6. Election of Local Officers (usually from a slate proposed by the core team)
7. Authorization of the Officers to file a petition to the International Society to become a charted chapter
8. Presentation (Guest Speaker) - between 30 and 45 minutes
9. Set date and place for next meeting
10. Adjourn

Leave some time for networking, usually before the program. Circulate an attendance sheet so you will have the information to contact attendees in the future. Plan to hand out and collect the Informational Meeting survey to those who did not provide them previously. After the presentation, ask those who have been elected to membership to fill in forms that will be needed to enroll them as members of the International Society and to arrange for payment of their membership fee.

Propose a date and location for the next meeting, and seek a show of hands for those who plan to attend (if you already have a topic or presentation planned, that will probably enhance the response). Follow-though by publishing minutes from the meeting. The minutes should report the decisions made and briefly summarize the speaker’s comments. This allows those who could not attend to feel part of the progress, and increases the likelihood that they will attend in the future. Appendix 3 has many useful suggestions that will assist in maintaining the momentum of this first meeting.

The goal of this meeting is to complete all the business items that ratify of the governing Constitution; establish the membership of the new chapter; elect the Local officers, and authorize filing a petition with the International Society. Achieving these goals will require good pre-meeting announcements and distribution of information.

**Election to Membership:** The first set of members are self-elected as part of a “bootstrapping” process. The faculty advisor and other faculty who are supporting the core team are responsible for working with the university or college administrators to determine who is eligible to be nominated for membership according to the Constitution. The Constitution has been drafted by the core team and university or college administrators will have approved it as satisfying the rules for student organizations. The core team invites the list of eligible students and alumni who are being nominated for membership to the Organizational Meeting. The number of students on the list of nominees and the rules for a quorum from the draft Constitution determines quorum requirement for the Organizational Meeting, so it very important that an adequate number of students who were invited attend the Organizational Meeting to establish a quorum. If there is a quorum present, new members shall be elected by a three-fourths (3/4) majority of the students present at the meeting. It is not necessary to vote separately for each individual, and a motion may be to approve the entire slate of nominees by a single vote of a three-fourths (3/4) majority.

**Chapter Constitution:** The first set of chapter constitution need not be more complex than required by the university or college and must be consistent with the draft articles offered in appendix 4. The constitution will have to be reviewed by administrators at your university or college who should be able to offer other concrete suggestions. After the constitution is approved by the membership, it should be attached to the Chapter Charter Petition.

**Candidates for Interim Officers:** The first set of Local officers will serve until the first official elections are held after the Chapter chartering process. The critical positions to fill are President, Vice President, and a Secretary plus all other officers that are required by the local institution. The initial candidates are generally members of the core team and those who indicated interest in holding a leadership position at the Informational Meetings. Chapters must accept nominations or volunteers from the floor at the Organizational Meeting. Experience shows it is inadvisable to rely on this process to fill any of the critical positions. These candidates are elected by the membership and listed as Chapter leaders in the Chapter Charter Petition.

**Summary:** Those present at this meeting form the initial organization. At the close of this step, the Interim officers are ready to build on the preceding months’ work and take the final steps toward becoming recognized as a chartered Sigma Theta Mu chapter.

# Grow the chapter and petition for Sigma Theta Mu Charter

The first job of the leadership of an Emerging Chapter is to petition formally to the international society for recognition as a chartered Sigma Theta Mu chapter. Providing quality programs and affiliation with the international society will help attract and keep members. To that end, Sigma Theta Mu recommends that chapters establish the following committees:

**Planning:** This ad hoc committee creates a plan to achieve Chartered status. The process should not take too long, lest your leadership team and membership get discouraged. Three to six weeks (from the Organizational Meeting to submission of the Charter Petition) is a realistic goal. Continue to communicate with the Society Secretary regarding progress and problems.

**Programs:** Planning for programs is the primary job of a Programs Chair, but all chapter members should contribute ideas for what they want to get from programs. The Informational Survey should offer some initial suggestions. Appendix 3 contains some lessons-learned from the Washington Metropolitan Area (WMA) chapter of INCOSE.

**Communications:** Keep new or potential members informed of current events using the resources provided by your institution. An e-mail “newsletter” is a good way to announce meetings and provide updates. Continue to use the same media to advertise your regular meetings as you used for your Organizational Meeting.

**Membership:** For many emerging chapters, this committee is optional because all the chapter leadership is focused on membership management and growth. It is this committee that finds ways to encourage members from different departments on the campus to get to know each other and ensures that sufficient networking time is built into each meeting.

**Succession Planning:** Build a leadership succession plan. Begin to identify potential chapter leadership by recruiting volunteers, finding out what they like to do, and letting them contribute to the chapter management.

**The Chapter Petition:** Appendix 5 contains the template for the Petition to Charter a Sigma Theta Mu Chapter. The completed petition form and indicated attachments comprises the Petition package. The final package contains the following:

1. name for the institution,
2. a primary point of contact and mailing address,
3. a description of the chapter’s geographic area,
4. a list of sponsors, if any have stepped forward and committed their support,
5. a current membership list for the chapter,
6. the list of the elected Interim Officers of the chapter,
7. a copy of the approved constitution (must be attached),
8. other status to report, for example, the next scheduled meeting.

The Secretary of the International Society should review the package before submission to Sigma Theta Mu Board of Directors. At that point, the material goes to the Sigma Theta Mu Board of Directors for approval. The official chartering document is mailed to the indicated point of contact for signature. The chapter is officially chartered when the document is executed.

Appendices

Where to go for help and other useful information

# Appendix 1 - Resources available from Sigma Theta Mu

To be determined.

# Appendix 2 - Sample informational meeting survey

***This survey was developed for INCOSE chapter start-ups. The Sigma Theta Mu international organization would like your feedback in the form of comments on this survey and examples of surveys that Sigma Theta Mu chapters use at their organizational meetings.***

1. In which of the following topics are you interested? (Check as many as desired)

\_\_\_ System engineering processes \_\_\_ Metrics

\_\_\_ System engineering management \_\_\_ Requirements management

\_\_\_ Concurrent engineering \_\_\_ System integration

\_\_\_ Case studies \_\_\_ System test

\_\_\_ Simulations, models, and prototypes \_\_\_ System engineering benchmarks

\_\_\_ Industry training for system engineers \_\_\_ University curricula in SE

\_\_\_ System acquisition policies \_\_\_ SE capability assessment

\_\_\_ System engineering applications \_\_\_ System architecture

\_\_\_ TQM training and results \_\_\_ Software specification

\_\_\_ Standards and guidelines \_\_\_ Software management

\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

2. What services would you like a local Chapter of Sigma Theta Mu to provide? (Check as desired)

\_\_\_ Technical presentations from members \_\_\_ Library of technical data

\_\_\_ Technical presentations by others \_\_\_ Handbooks or guidebooks

\_\_\_ Member forums on technical issues \_\_\_ Best practices information

\_\_\_ Interest groups (within Chapter meeting) \_\_\_ Interest groups (separate activity)

\_\_\_ Clearinghouse for benchmarking data \_\_\_ Book reviews (and other literature)

\_\_\_ Electronic bulletin board \_\_\_ Local or regional conferences

\_\_\_ Community involvement \_\_\_ Training sessions and materials

\_\_\_ Social activities - within meetings \_\_\_ Social occasions - weekend

\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

3. What days of the week do you prefer for the monthly Chapter meeting (Check all that are OK.)

\_\_\_ Monday \_\_\_ Tuesday

\_\_\_ Wednesday \_\_\_ Thursday

\_\_\_ Friday \_\_\_ Weekend

4. Which week of the month do you prefer for the Chapter meeting?

\_\_\_ First \_\_\_ Second

\_\_\_ Third \_\_\_ Fourth

\_\_\_ Don’t care \_\_\_ Any week but \_\_\_\_\_\_\_\_\_\_

5. What meeting time do you prefer?

\_\_\_ Lunchtime \_\_\_ begin at 5:30 P.M.

\_\_\_ begin at 6:00 P.M. \_\_\_ begin at 6:30 P.M.

\_\_\_ begin at 7:00 P.M. \_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

6. Where should the Chapter hold its meetings?

\_\_\_ *Location A*

\_\_\_ *Location B*

\_\_\_ Rotating location

\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

7. Are you currently a member of INCOSE (Dues paid)? \_\_\_ Yes \_\_\_ No

###### If no, have you ever been a member? \_\_\_\_Yes \_\_\_No

8. Would you like to be involved in any of the following? (“1”= 1st choice, etc.)

\_\_\_ Membership \_\_\_ Programs

\_\_\_ Chapter Officer (President, V.P., etc.). , \_\_\_ Communications

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Information: Please fill out completely to help us keep you informed:

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Department \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

E-mail (Campus) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

E-mail (Home)\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Mailing Address… (Campus) (Permanent Home)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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# Appendix 3 - Chapter Programs Lessons Learned

***This survey was developed for INCOSE chapter start-ups. The Sigma Theta Mu international organization would like your feedback in the form of comments on these lessons learned and lesson that Sigma Theta Mu chapters have learned.***

These lessons learned were submitted Sarah Sheard of the Washington Metropolitan Area Chapter of INCOSE..

First, if you do not have interesting programs, people will not come. If you do, people will.

Second, members who attend meetings are more interested in promoting the chapter.

##### Some things that work:

1. Board meetings immediately prior to each chapter meeting
2. Maximizing member networking opportunities
3. Putting announcements in local engineering papers (6-8 weeks in advance)
4. Tutorials
5. Taking Sigma Theta Mu material to local job fairs, etc.
6. Offering free meals to first-time attendee, or sponsoring a “bring a guest” night

##### Lessons-learned

1. Have programs planned four to six months in advance and confirmed three months in advance. This allows sufficient time to put notices in newsletters such as INSIGHT or local newspapers.
2. If you meet frequently, keep the same date, place and time for every month. This allows people to “schedule” their meetings.
3. Find a sponsored location and order food.
4. Brainstorm many possible programs
5. ask Officers what people might like;
6. look through INCOSE, IIE, PMI, CESUN, and other professional society conference proceedings papers for possible topics and speakers;
7. Poll the membership
8. put the list of possible programs in a two-page survey, asking people to check off the programs they would like to see;
9. don't ask complicated questions, they do not get answers;
10. the people who attend meetings are your primary target audience, experience shows a low response rate from non-attendees.
11. Compile the survey results.
12. Rank the programs in order of descending popularity.
13. Try to find speakers who can talk about the topic. You should be able to draw on chapter members and friends of chapter members who are willing to speak for no charge. To attract a non-local person, you may have to pay.
14. Ask the officers to help find speakers. In a board meeting, ask each officer to sign up for one of the eight or so topics targeted for inclusion in the next six meetings (at least two intended programs will fall through.) Usually each officer will have one lead in his or her network...
15. Try to schedule programs relevantly. For example, in the USA, schedule a talk on the IRS's new computer system in April.
16. Do not feel obligated to follow the member survey. If good program opportunities present themselves, schedule them.
17. Tie some programs to chapter goals. For example, the chapter may want to diversity of beyond a specific academic department in engineering, and would seek to invite a faculty member in political science or the business school to give a talk on systems research in their discipline.
18. Try to schedule variety. At first, rotate speakers from different disciplines.
19. Do not have a meeting at the end of the school term, although “graduation party” meetings may be well attended.

##### General hints:

1. *Think outside the box*. Think of topics that ARE NOT directly relevant to many SEs, but are interesting. For example: politicians have ideas for privacy, or information exchange, or patents; school systems have information system needs; and transportation systems have requirements. Consider speakers from highway departments, or ask a biology professor to talk on how organisms display complexity. Etc.
2. Use the chapter board of directors. If the committee has ideas, they can help make them happen. When asked, many of them WILL help. However, do not expect them to volunteer, ask!
3. Decide on the topics first, and then find speakers.
4. If a speaker has a good reputation, let them choose whatever they want to talk about. On the other hand, do not scratch a topic off the list just because a speaker is unknown.
5. Make "cold calls" to potentially interesting speakers. Explain what Sigma Theta Mu is. They might say no but they might say yes.

# Appendix 4 – DRAFT ARTICLES for CONSTITUTION OF THE Sigma Theta Mu chapters

Draft articles for a constitution are presented in this appendix that are consistent with the International Society constitution. Most universities and colleges have their own requirements and templates for constitutions of student organizations, and Sigma Theta Mu will defer to the local institution’s requirements as long as the constitution is consistent with the International Society constitution. It is best practice to review the constitution of other honor societies at your institution to develop your local constitution.

**CONSTITUTION OF THE** **SIGMA THETA MU** **CHAPTER AT   
(INSTITUTION NAME)**

**ARTICLE I – NAME**

The name of this organization shall be Sigma Thea Mu at (Institution Name), hereinafter designated as the CHAPTER.

**ARTICLE II - PURPOSE**

The purpose of the CHAPTER shall be to recognize and promote high scholastic, scientific, and professional attainment in the study and practice of systems, systems-related engineering, or systems engineering. The CHAPTER shall be a charted chapter of the Sigma Theta Mu, hereafter referred to as the SOCIETY, as provided for by the SOCIETY Constitution.

**ARTICLE III - FACULTY ADVISOR**

SECTION 1

The CHAPTER shall have a faculty advisor elected by a majority vote of the CHAPTER members present at a meeting called for the purpose of electing officers or as otherwise required by the university or college. The faculty advisor shall be a member of the Society. The Board of Directors of the Society reserves the right to approve the election of the faculty advisor.

SECTION 2

The faculty advisor shall remain in office until resignation or removal for cause by the Board of Directors of the SOCIETY or by (Institution Name).

**ARTICLE IV - MEMBERSHIP**

SECTION 1

It shall be the duty of the faculty advisor to review the scholastic records of all students to determine which students are eligible for membership in the SOCIETY. A list of eligible students shall be placed in nomination by the chapter Secretary or consideration by the CHAPTER members present at a meeting called for the purpose of electing new CHAPTER members.

SECTION 2

New members shall be elected by a three-fourths (3/4) majority of the members present at the meeting called for the purpose of electing new CHAPTER members.

**ARTICLE V - OFFICERS**

SECTION 1

The officers of the chapter shall be a President, a Vice-President, and a Secretary. [Note: A chapter may have fewer officers, if allowed by the college or university rules for student organizations.]

SECTION 2

The chapter President shall be the executive officer of the chapter. He or she shall preside at all meetings, shall appoint such committees as may be necessary to operate the chapter and shall perform such other duties as the chapter may request.

SECTION 3

The chapter Vice-President shall assist the President, shall preside at all functions of the chapter in his or her absence, and shall perform such other duties as the President of the chapter may request.

SECTION 4

The chapter Secretary shall keep a full and permanent record of all meetings and proceedings of the chapter and shall have custody of all record, reports, or other important chapter documents. All chapter records shall be open to the inspection of the chapter members and of properly accredited officials of the Society and the college or university. The chapter Secretary shall conduct all official correspondence promptly and shall perform such other duties as the President of the chapter may request. He or she will also send an Annual Chapter Report that lists the new members initiated during the year to the Secretary of the Society at the end of his or her term. The Annual Chapter Report is to be mailed electronically no later than June 15.

SECTION 5

The Officers of the CHAPTER shall serve for a one-year term and shall be eligible for re-election.

**ARTICLE VI - MEETINGS**

SECTION 1

Meetings of the chapter may be called by the chapter President when the occasion demands.

SECTION 2

The CHAPTER shall hold an annual meeting for the election officers and the consideration of any other business to be brought before it.

SECTION 3

The CHAPTER shall hold a meeting each year to elect new members, a meeting to instruct new initiates in the purpose and ideals of the Society, and a meeting for the formal initiation of new members.

**ARTICLE VII - INITIATION**

 The formal initiation ceremony shall be open to the public and may coincide with the annual meeting. The initiation of new members shall be conducted in a dignified manner and in accordance with a ritual that approved by the Board of Directors of the SOCIETY for all chapters. Under no circumstances will there be any hazing or harassment of member candidates or members.

**CERTIFICATE OF THE SECRETARY**

I, the undersigned, certify that I am the Secretary of the Sigma Theta Mu Chapter at [Institution Name], and that the above constitution, consisting of [number of page here] pages, have been approved by general vote of the Membership on [Adoption date here].

Dated: Original signed by [Secretary name] , Secretary

# Appendix 5 - Sigma Theta Mu Chapter Charter Petition

Petition to Charter

A Sigma Theta Mu Chapter

|  |  |
| --- | --- |
| Criteria |  |
| Institution | Provide your institution’s name and address here |
| Petition Point of Contact | *Provide a name, address, phone number and email address for the faculty advisor* |
| Area covered by chapter | *Describe geographic boundaries here* |
| Sponsor(s) to-date | *Organization and individual names listed here* |
| Chapter Constitution | See attached constitution adopted at our organizational meeting on *date* |
| Current Members | See attached roster |
| Interim Officers and Committee Chairs | *President:*  *V. P.*  *Secretary:*  *Treasurer:*  *Programs:*  *Communications:*  *Membership:* |
| Banking Account Information: | *For bank transfers from Society*  *1) Bank Name/Address/Phone number*  *2) Routing Number (this can be found on the bottom of US checks, it's the number before the account number)*  *3) Account Name and Account Number*  *4) SWIFT number for International accounts* |
| Next meeting | *Date, Location, Theme (if known)* |

Submitted by:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Faculty AdvisorDate