



# Pi Theta Epsilon

## Chapter Standard Operating Procedures

Updated April, 2024

### I. Issues, Concerns & Limitations

#### A. Activities within the scope of PTE

1. All activities of PTE national board and individual chapters will support the mission "...to support the development of occupational sciences and the practice of authentic occupational therapy by promoting research and other scholarly activities by its members. In this way, the organization serves not only the profession, but helps to ensure quality health care services for the general public."
2. PTE chapter fundraising should directly support:
  - a. sustaining the chapter (i.e. induction ceremonies)
  - b. research initiatives
  - c. scholarship activities,
  - d. attendance of the voting delegate to the Annual Business Meeting

#### B. Disciplinary action/termination of membership

1. In the event that a PTE member acts in a manner that the local chapter feels reflects the values of PTE poorly, with substantial evidence (i.e. unlawful or criminal activity, evidence of academic dishonesty), the local chapter, in consultation with the faculty advisor, may take appropriate disciplinary action up to and including termination of PTE membership.

### II. Election to Membership in Pi Theta Epsilon

#### A. The Association of College Honor Societies (ACHS) requires that specialized honor societies be established to recognize and encourage superior scholarships in a specialized field at either undergraduate or graduate levels.

1. Election of new members shall include those who have demonstrated superior scholarship, evidenced by:
  - a. Ranking within the highest 35% of their class.
  - b. Completing the number of credit hours used by the institution to designate one full academic term equivalency in an entry-level

baccalaureate or post -baccalaureate program in occupational therapy.

2. An eligible student need not apply for membership in the semester in which she or he becomes eligible but may apply any time until the beginning of the final academic semester/quarter prior to beginning fieldwork. A student must have at least one entire semester remaining after initiation before leaving for a fieldwork placement.
  3. A piece of scholarly written work, completed while enrolled in the occupational therapy program, shall be submitted as evidence of the applicant's ability. The applicant shall also submit a short essay (250 words) stating why she/he wishes to join PTE. Uniform review criteria shall be established as PTE policy.
  4. Part-time students are eligible for membership. Part-time students are those for whom the total span of time allotted to complete all requirements for the degree program is greater than the usual number of required semesters or quarters. To be eligible, part-time students must have completed the number of graduate credit hours used by the institution to designate full academic term equivalency in an entry-level post baccalaureate program in occupational therapy. GPAs for part-time Students shall be figured separately for each student, relative to a current full -time class in the program. The several part-time students enrolled in the program shall not be considered as a "class" but shall have met all other eligibility requirements.
  5. Lapsed members (those who have not continued to pay chapter dues as alumni) may rejoin the local PTE chapter of their choosing by paying only the current year's membership fee. No reinstatement fees shall be charged by any local chapter. Membership in a local chapter automatically bestows membership in the national society.
  6. ACHS does not permit a national honor society to require membership in any other organization such as the American Occupational Therapy Association, American Student Committee of the Occupational Therapy Association.
- B. Candidates will be reviewed by a Review Board comprised of the PTE chapter president and any TWO of the following individuals: a) the chapter advisor, b) an alumni member, c) a member of a local support chapter, and/or d) a faculty member of the OT program not affiliated with PTE.
- C. Nominations of student members shall be made by the Review Board. Election shall be by a majority vote of the chapter.
- D. Pi Theta Epsilon does not discriminate against any prospective member on the basis of race, gender, religion, ethnicity, disability, or age.

### III. National and Chapter Dues

- A. National Fees must be paid in order to be inducted into a chapter.
1. New members shall, at the time of their induction, pay either a lifetime membership fee of \$175.00 (which includes the \$50 induction fee) or a

standard payment of \$75.00 which includes an induction fee of \$50.00- and first-year dues of \$25.00 to the national PTE organization.

2. Active members shall pay the annual membership dues of \$25.00 to the national PTE organization or at any time can pay a one-time lifetime membership fee of \$125.00
3. All fees and dues will be determined by the members attending the Annual Business Meeting.

B. Chapter Induction Fee

1. An induction fee may be established by the local chapter which is sufficient to cover local costs of induction.

C. Chapter Dues

1. Chapter dues shall be established by a simple majority vote of the active members of the chapter.

IV. Meeting Dates & Times

- A. Chapters are required to hold an induction ceremony following the selection of new members. It is recommended chapters hold the ceremony annually.
- B. Chapters will hold a meeting at minimum once per term (semester vs. quarter). It is recommended chapters hold meetings once per month.
- C. Chapters must provide members at least one month's notice of the chapter meeting date when officer elections will take place.
- D. Chapter elections may take place in person and/or electronically.
- E. The Annual Business Meeting will be held annually at the AOTA Annual Conference. All chapters are recommended to send one voting delegate to represent them. All active PTE students and alumni members are encouraged to attend.

V. Functions of the Chapter

A. Chapter Establishment and Initiation of Members

1. Chapter Establishment

- a. Programs will complete the [chapter application process](#). To access the petition form, programs should contact the National Coordinator at [pte@aotf.org](mailto:pte@aotf.org). Or visit the [PTE Website](#)

- b. Designate Chapter Advisor

2. Induction of Members

- a. Induction of new members shall take place within two months after the candidates have been elected.

B. Chapter Officers

1. Elected officers shall serve for one year.

- a. The President shall call the meetings and shall preside at meetings. The President shall promote the functioning of the organization in accordance with National and Chapter Bylaws. The President shall serve on the Chapter Review Board. The President shall not vote in the election of officers except in the case of a tie.
- b. The Vice President shall assist the President. The Vice President shall preside over meetings in the absence of the President.
- c. The Secretary shall record the proceedings of all meetings, carry on all necessary correspondence, and maintain the records of the organization.
- d. The Treasurer shall be responsible for handling all monies and financial records of the chapter, including the preparation of the annual budget. The Treasurer shall provide for safekeeping of monies collected and exchanged with the National Office of PTE.

#### C. Selection and Function of Chapter Advisor

##### 1. Selection of the Chapter Advisor

- a. The active membership of the chapter shall authorize the Secretary to send a written invitation to a faculty member each year inviting her or him to serve as advisor for the following year.
- b. Eligibility: The advisor shall be a Registered Occupational Therapist (OTR) and a member of the occupational therapy faculty.
- c. The faculty member shall notify the Chapter in writing that she or he accepts or declines the position.

##### 2. Functions of the Chapter Advisor

- a. The advisor shall identify the top 35% of each class who are eligible to apply for membership.
- b. The advisor shall serve as a member of the Chapter Review Board.
- c. The advisor shall attend meetings regularly.
- d. The advisor shall act as a liaison between faculty and PTE.
- e. The advisor shall not have a vote.
- f. The advisor shall receive nominations for chapter officers.

#### D. Chapter Activities

1. In addition to regular chapter meetings, all chapter activities should directly support the mission of PTE.

### VI. Ethical Operations

#### A. Conflict of Interest

1. Statement on the prevailing state laws regarding leadership at PTE  
w/AOTA involvement

B. Special Considerations

1. The purpose of fundraising shall be to fund the mission or activities supporting the mission of PTE and AOTF

C. Running for national office

1. When running for national office, nominees may:
  - a. Submit a written statement to be published in the scroll and pen and sent out with ballots.
  - b. Notify their alma mater.
  - c. May not do any other form of campaigning whatsoever.

VII. Non-Discrimination Clause

- A. No person will be discriminated against based on race, color, creed, religion, national origin, age, handicap, gender, sexual orientation, or Veteran status