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Archives

The following hard copy documents will reside at the ASME Headquarters in New York City.

- Auxiliary Operations Guide
- By-Laws and Constitution
- National and Annual Meeting Agendas and Minutes
- One copy of past historical booklets
- List of all scholarship winners as of 2010 to current
- Scholarship Endowment information from 2015 to current
- The ASME Song
- Pipeline Newsletters

Purpose of this Operation Guide

The purpose of this Operation Guide is to aid the Auxiliary in carrying out its Mission and Vision and conducting business throughout the year. It shall be reviewed each fiscal year by the current President and Treasurer.

The Auxiliary, Inc.

The American Society of Mechanical Engineers Auxiliary, Inc. hereafter referred to as The Auxiliary, is an independent 501(c)(3) corporation.

The Auxiliary Constitution and By-Laws that provide the foundation and authority for the ASME Auxiliary Inc. are available on the ASME Auxiliary Community Page.

The objective of the Auxiliary shall be to establish Educational Funds for the purpose of assisting worthy students in the study of Mechanical Engineering or for graduate work.

The Auxiliary is its own entity separate from that of the ASME. It is comprised of National Officers, an Executive Committee, National Board and Committee Chairs. National Officers are annually elected and the other positions are appointed by the President.
Mission and Vision

Mission

To establish Educational Funds for the purpose of assisting worthy students in the study of Mechanical Engineering at the undergraduate, master’s and doctoral levels.

Vision

To promote, independently or in conjunction with the American Society of Mechanical Engineers, the advancement of the art and science of mechanical engineering and the dissemination to engineers and the general public of advanced and new developments in mechanical engineering.

Organization of the Auxiliary

The Auxiliary includes National Officers, an Executive Committee, a National Board and Standing Committee Chairs.

National Officers

President
Executive Vice President
Recording Secretary
Corresponding Secretary
Treasurer
Student Loan Fund Treasurer

Executive Committee

President
Immediate Past President
Executive Vice President
Treasurer
Member – appointed by President
Alternate #1 – appointed by President
Alternate #2 – appointed by President
Alternate #3 – appointed by President
Alternate #4 – appointed by President

National Board

National Officers
Immediate Past President
Standing Committees

Constitution and By-Laws
Courtesy
Historian
Honors and Awards
Membership Expansion
Newsletter
Nominating
Parliamentarian
Publicity
Lucy and Charles W.E. Clarke Scholarship
Undergraduate Scholarships
Master’s Scholarships
Doctorate Scholarships
International Scholarships
Student Loan Account

Membership – see Appendix I
Refer to Article I of the Auxiliary By-Laws for more information on membership.

Section Members – a member who is associated with a specific Auxiliary Section.
Members-at-Large – a member who does not belong to a Section.
Associate Member – one who has no familial ASME connection.
Life Member – a member who pays a one time dues fee.
Terms of Office
All terms of officers are renewed via an annual election process.

President Two Year Term
Executive Vice President Two Year Term
Recording Secretary One Year term, unlimited term
Corresponding Secretary One Year term, unlimited term
Treasurer One Year term, unlimited term
Student Loan Fund Treasurer One Year term, unlimited term

Standing Committee Chair and Members One Year term, unlimited term - appointed

Filling Vacancies

Vacancies of officers occurring on the National Board, other than in the presidency, shall be filled by an appointment of the President until the next annual election. Vacancy in the presidency shall be filled by the elected officers in order of their rank.

If there are no volunteers to run for President at the end of the current President's term, the current President may have the option to re apply for the position for another full term or until another member volunteers to be put on the next ballot.

Officer, Committee Chair, and Staff Functions

President
The President shall preside at the Annual Meeting of The Auxiliary and at all meetings of the National Board; shall be Chair of the Executive Committee; shall appoint the Chairs of all other standing and special committees (except the Honors and Awards Committee whose Chair shall be the Immediate Past President); shall appoint all members of the Nominating Committee and shall be a member ex-officio of all committees except the Nominating Committee. The President shall submit a report at the Annual Meeting and at each National Board Meeting. A detailed job description can be found in Appendix II.

Immediate Past President
The Immediate Past President shall chair the Honors and Awards Committee. If the Immediate Past President is not able or willing to hold this position, the next immediate past president may assume Chair and another member, preferably a past president, may be appointed by the President.
Executive Vice President
A member of the Executive Committee and a member of the Honors and Awards Committee, the Executive Vice President shall be a liaison between the Auxiliary and ASME in making arrangements for luncheons and programs that follow the Auxiliary meetings. If the President is temporarily unable to conduct meetings of the Board, the Executive Vice President shall serve as Acting President for the duration of the President’s absence.

Recording Secretary
A member of the National Board and shall record the minutes of all meetings and, in cooperation with the President, establish a schedule for the review of a draft of the minutes and for their final preparation so that the minutes can be sent promptly to ASME headquarters for distribution. Responsible for providing abridged minutes for the bi-annual Pipeline Newsletter.

Corresponding Secretary
A member of the National Board, the Corresponding Secretary communicates with the ASME Auxiliary officers and members.

In conjunction with the Auxiliary Treasurer, donor information is retained and a mailing list of all Auxiliary members is kept up-to-date.

Thank you letters, which double as charitable income tax filing receipts, are sent to people who make donations to the various scholarship funds or general donations. When a memorial fund is setup in someone’s name, a letter is sent to the respective family member or members listing the names of the people who have donated to the memorial fund. Typically, around 60 to 70 letters are sent out every year and copies are kept in an electronic data file, preferably Excel. At the end of the fiscal year, the Excel file shall be forwarded to the ASME Staff Coordinator for filing at the New York Office.

Treasurer
A member of the Executive Committee and National Board, the Treasurer shall keep all accounts of The Auxiliary except the Student Loan Fund Account, collect dues, and submit a financial statement at each regular meeting of the National Board. The Treasurer shall send the Treasurer’s records to the ASME Controller for the arrangements for Assurance services by an independent accounting firm in accordance with regulatory requirements which will be handled by ASME. The Treasurer shall present the final financial report during the National Board Meeting at the Congress. Invoices for The Auxiliary shall be paid by the ASME Controller, as approved and signed by the President and the Treasurer of the Auxiliary.

The Treasurer shall prepare an annual budget to be presented to the National Board for approval at the Annual Meeting and shall act in an advisory capacity to said Board on financial matters.
The Treasurer shall be a member of the Executive Committee, and an advisory member of the Scholarship Committees. Upon written request from the Scholarship Chair, The Treasurer shall instruct the ASME Controller to disburse the Scholarship Funds.

The Treasurer shall keep an official membership list and send all necessary corrections to ASME and to all officers who have membership files.

**Student Loan Fund Treasurer**

The Student Loan Fund Treasurer shall receive and disburse all Student Loan Fund monies and shall submit a report at each National Board Meeting and a yearly report at the Annual Meeting. The Student Loan Fund Treasurer shall act in the Treasurer's absence. The books of the Student Loan Fund Treasurer shall be mailed to ASME ten (10) days after the end of the fiscal year. The Student Loan Fund Treasurer shall keep loan records and correspond with loan recipients to keep payments current.

**Standing Committees**

The following Standing Committees of the National Board, whose members (with the exception of the Executive Committee and the Honors and Awards Committee) shall be appointed by the Chair of the committee in cooperation with the President are:

- Constitution and By-Laws
- Courtesy
- Executive
- Historian
- Honors and Awards
- Membership Expansion
- Newsletter
- Nominating
- Parliamentarian
- Publicity
- Student Loan Fund
- Lucy and Charles W.E. Clarke Scholarship
- Undergraduate Scholarships
- Rice-Cullimore Scholarship
- Marjorie Roy Rothermel Scholarship
- Elisabeth M. & Winchell M. Parsons Scholarship

The term of the office, of the committee chair and members, shall be one year. All are eligible for reappointment.

Please see Section IV of the Auxiliary By-Laws for details on Standing Committee Chair functions.
ASME Staff Coordinator

In conjunction with the Auxiliary President;
- prepare and send out agendas for all meetings,
- set meetings and send out connection information, and
- prepare speeches and newsletter article,

In conjunction with the Auxiliary Recording Secretary,
- review and send out meeting minutes,
- help prepare abridge minutes for Pipeline Newsletters, and
- remind committee chairs to send reports into Recording Secretary prior to each Board and Annual Meeting.

In conjunction with Treasurer;
- Review and send in all expense reports,
- Assist in receiving monthly financial statements from the ASME Accounting area, and
- Liaison with ASME Accounting Department.

In conjunction with all scholarship chairs;
- Prepare all applications annually with outside vendor Wizehive,
- Have kick off meetings with all scholarship committees,
- Review Wizehive portal with new readers,
- Track/trouble shoot applications,
- Meet with ASME to determine scholarships,
- Notify students of scholarship recipients,
- Coordinate the necessary items needed from students before checks can be processed,
- Prepare all check requests and send to ASME Accounting,
- Receive and send checks to the student’s education institution with a letter (CC student on the letter),
- Send electronic certificates,
- Post names on ASME Scholarship Website page, and
- Enter scholarship information into the student’s ASME record.

Pipeline Newsletter
- Determine articles for the newsletter
- Print out mailing labels
- Print, fold and mail hardcopies of newsletter
• Prepare PDF version of newsletter and email out to Auxiliary members with good email addresses

**Ballot**
• Gather biographies and pictures for the newsletter
• Add ballot and envelope in newsletter to Auxiliary Members that do not have emails
• Prepare online ballot and trouble shoot as needed

**Miscellaneous Items**
• Physical set up of all meetings which include having extra agendas, necessary handouts, DSA Awards/Certificates, tent cards, badges and food/beverage arranged.
• Collaborate with Executive Vice President to find luncheon speakers
• Create programs for the Auxiliary Luncheons

**Auxiliary Meetings and Quorums**
The Auxiliary holds four (4) official meetings per fiscal year in conjunction with the IMECE and Annual meetings of the ASME;

National Board Meeting in November and June – Eight members shall constitute a quorum at these meetings.

Annual Board Meeting in June – Twelve members shall constitute a quorum at this meeting

Special Meeting in June – Auxiliary members elect two additional members to the Honors and Awards Committee.

Section Meetings shall be in accord with the By-Laws of the Sections.

Additional Meetings - At any time throughout the year, at the discretion of the Auxiliary President, additional meetings may be scheduled to discuss items that come up in between the National Board Meetings. Debriefs from these additional meetings will be shared at the National Board Meetings.

**Annual Reports**
All National Board Members’ and Committee Chairs’ Annual Reports shall be submitted to the President and Recording Secretary in a Word format at least 3 weeks prior to the Annual Meeting. These reports will be presented at the Annual Meeting in June. Each meeting. If an action is needed, the report shall include a proposed written motion.
### Agenda and Minutes

Meeting Agenda items shall be forwarded to the ASME Staff Coordinator at least 30 days prior to meeting dates.

Meeting Minutes shall be released for review no later than 15 days after said meeting date. Minutes shall be approved at the future Annual and National Board Meetings. Approved Minutes shall be forward to the ASME Controller.

Abridged Minutes, used in the Pipeline Newsletter, shall accompany each full set of minutes sent to the ASME Staff Coordinator.

### Auxiliary Scholarship Program

All scholarships are applied for with an online application that is hosted by an outside vendor named Wizehive, with the exception of the Rice-Cullimore Scholarship.

No one student shall be granted more than one Auxiliary loan or scholarship in the same academic year.

The selection of applicants to receive scholarships shall be left to the discretion of each individual scholarship committee, subject to final approval by the National Board.

### Graduating High School Senior Scholarship

**Lucy and Charles W. E. Clarke Scholarship ($5,000 each) – Procedures - Appendix III**

Lucille Clarke bequeathed money for freshmen college students to honor her parents. Lucy Clarke was an active member of the Philadelphia Section of the ASME Auxiliary. Her father Charles couldn't afford a college education but he became very successful in his own right.

This scholarship is awarded to high school seniors participating on a United States FIRST Robotics or FIRST Challenge Team. The number of awards is determined at the November National Board meeting based on the previous year’s fiscal year financials. Online application opens on December 1 and closes March 15. The Lucy and Charles W. E. Clarke Scholarship Committee selects the recipients. Winners are notified in mid April. Checks shall be made payable to the student’s institution only. Students must be United States Citizens, full time students in an ABET accredited institution and provide a letter of acceptance, proof of registration, school’s bursar information and ID number before a check can be processed in August. A copy of the check, letter to the bursar and certificate are sent to the student via email.

At least, 5% of the Temporarily Restricted and Unrestricted numbers is used on the Auxiliary Accounts (Clarke 9-00301110 Temp Restricted and 9-00401110 Unrestricted)

Checks are paid from the Clarke account 9-00251110-9924
Student must be a United States Citizen and be enrolled in a mechanical engineering, mechanical engineering technology or related baccalaureate program. This scholarship is to be used in the final year of undergraduate study so a student will apply in their junior year or in their fourth year if they are in a five year program.

The number of scholarships is determined at the November National Board Meeting based on the previous year’s fiscal year financials. Online applications open on December 1 and close on March 1. The Auxiliary’s Undergraduate Scholarship committee will review applications in May. Recipients will be awarded one of the following scholarships: (ex; award name and account number)

Sylvia W. Farny Scholarship (Account 9-00201102-9924) was established in 1952 in honor of Sylvia W. Farny, the first national president and Honorary Member of the Woman’s Auxiliary to the ASME. Her leadership contributed not only to greater membership but also to the organizing of many of the sections.

Berna Lou Cartwright Scholarship (Account 9-00251107-9924) was memorialized in 1994 by her family and an undergraduate scholarship was established in her name. Berna Lou Cartwright was a member of the Los Angeles Section and Chair of the Elisabeth M. and Winchell M. Parsons Scholarship.

Allen J. Baldwin Scholarship (Account 9-00251109-9924) was established by his wife, Ella Baldwin-Viereck, in 1998. Allen was a Regional Vice President and was instrumental in establishing the professional engineering courses in Minnesota.

Agnes Malakate Kezios Scholarship (Account 9-00251111-9924) was established by her husband Stotie Kezios in 2001. Agnes Kezios was a member of the Auxiliary.

Charles B. Scharp Scholarship (Account 9-00251112-9924) was established in 2006 by Phyllis Scharp, a founding member of the Baltimore Section of the Auxiliary, to honor her husband. Charles was chair of the American Society of Mechanical Engineers Performance Test Codes for steam turbines. He served on ASME’s Board of International Standards, Board on Pressure Technology Codes and Standards, the Council on Codes and Standards, and Board on Performance Test Codes. He was a registered professional engineer and authored 12 technical papers for ASME. Charles was elected Fellow and received the Performance Test Code Gold Medal.

Carolyn and James M. Chenoweth Scholarship (Account 9-00201118-9924) was established in 2015 by Cindi Pool to honor her parents Carolyn and James M. Chenoweth. Carolyn served as a Section Treasurer and President of the Auxiliary and was an active member of the Auxiliary’s National Board. James also held the position of Student Loan Treasurer and was an
active member of the National Board. Both received the ASME Dedicated Service Award and Carolyn received an Auxiliary Honorary Membership.

Irma and Robert Bennett Scholarship Fund (Account 9-0020114-9924) Irma Bennett was a President of the Auxiliary and received Honorary Membership. Both Irma and Robert received the ASME Dedicated Service Award and served as Chairs of the Rice-Cullimore Scholarship. The Irma and Robert Bennett Scholarship Fund is an unrestricted account with no specific scholarship tied to it. This account is used at the discretion of the Auxiliary to fund additional scholarships.

Master's Program Scholarship – Procedures Appendix IV

Selected students are voted on at the National Board Meeting in June and then notified. Checks shall be made payable to the student’s institution only. Students must be full time students in an ABET accredited institution and provide a letter of acceptance, proof of registration, school’s bursar information and ID number before a check can be processed in August. A copy of the check, letter to the bursar and certificate are sent to the student via email.

Marjorie Roy Rothermel Scholarship -$3,000 (Account 9-00201103-9924)
This scholarship was established in 1958 and named in memory of Mrs. U. Amel Rothermel who became the twenty-first president of the ASME Women’s Auxiliary.

Doctorate Program Scholarship - Procedures Appendix IV

Selected students are voted on at the National Board Meeting in June and then notified. Checks shall be made payable to the student’s institution only. Students must be full time students in an ABET accredited institution and provide a letter of acceptance, proof of registration, school’s bursar information and ID number before a check can be processed in August. A copy of the check, letter to the bursar and certificate are sent to the student via email.

Elisabeth M and Winchell M. Parsons Scholarship -$3,000 (Account 9-00251106-9924) Julie Parsons Cole honored her parents memory in 1986 by establishing the Elisabeth M. and Winchell M. Parsons Scholarship. Elisabeth Parsons was an active member of the Los Angeles Section.

International Student Scholarship- Procedures - Appendix V

This scholarship is for foreign students for one year’s maintenance while doing graduate work for a Master's or Doctoral Degree in mechanical engineering in the U.S. under the Fulbright Program.

Selected students are voted on at the National Board Meeting in June and then notified. Checks shall be made payable to the student’s institution only. Students must be full time students in an ABET accredited institution and provide a letter of acceptance, proof of registration, school’s bursar
information and ID number before a check can be processed in August. A copy of the check, letter to the bursar and certificate are sent to the student via email.

The Rice-Cullimore Scholarship -$3,000 (Account 9-00201105-9924) established in 1938. Dr. Calvin W. Rice, Secretary of ASME, encouraged the formation of an Auxiliary to ASME. Mrs. Calvin W. Rice was one of the founding members. Mrs. Edith Van Alst Cullimore was a member of the National Executive board for 33 continuous years. She served on the Calvin W. Rice Memorial Scholarship from its inception in 1938. She was chairman from 1954-1971. She received Honorary Membership in 1971. Around 1973, the name was changed to the Rice-Cullimore Scholarship Fund.

Auxiliary Loan Program
The ASME Student Loan Program is designed to provide financial assistance to ASME Student Members who might experience undue hardship in completing their degree studies due to the unavailability of sufficient financial aid through the normal student financial programs.

The applicant shall be an ASME Student Member in good academic standing, and be enrolled full-time in an approved mechanical engineering or mechanical engineering technology degree program. Students must maintain their ASME Membership through the duration of the loan. If their ASME Membership is dropped the loan will automatically become due in full.

The maximum amount borrowed by an individual at any one time shall not exceed $5,000.

The Auxiliary accepts applications all year. The application is reviewed by the Loan Committee and either approved or denied. A completed application, promissory note and check request is then sent to the Accounting office. Once the loan is paid to the student the follow up communications will come from the Student Loan Treasurer in collaboration with ASME’ s accounting department. Please see Appendix VI for document templates.

Endowed Scholarship Policy – See Appendix VII for Establishing Scholarship Forms.
The National Board shall review all bequests for scholarships, and if appropriate for the Auxiliary, approve receipt of such bequests. The principal amount of such bequests should be invested with the other funds of the Auxiliary. New named scholarship funds shall be separately accounted for with a new account while additions to existing scholarship funds should be added to the funds in the existing scholarship account.

A new scholarship, which is to be a “named scholarship”, shall be endowed by the bequest(s) of at least $25,000. Further, the purpose of the scholarship (i.e. for graduate study, seniors’ only, foreign student, etc.) and the amount of the scholarship shall be consistent with one of the present scholarships of the Auxiliary. The existing on-line scholarship application shall be utilized.

The Scholarship Committee, now designated to process applications for the existing scholarships, shall be responsible for processing the named scholarship.
The initial and subsequent awarding of funds for any named scholarship shall only be made after the principal has earned adequate monies to cover the scholarship amount awarded unless additional funds are made available to the National Auxiliary Board.

If less than $25,000 is donated, the funds shall be invested and upon reaching the amount of $25,000 through investment returns and any additional donation, there shall then be established a new scholarship fund.

**Honorary and Dedicated Service Awards**

Each year the Honors and Awards Committee may select a member to receive an ASME Dedicated Service Award. The application requires a nominator and two endorsers. Once the application is completed it is forwarded to the ASME Honors and Awards department for processing. The award consists of a wooden plaque, certificate and pin.

The application can be found at [https://www.asme.org/about-asme/get-involved/honors-awards/service-awards/dedicated-service-award](https://www.asme.org/about-asme/get-involved/honors-awards/service-awards/dedicated-service-award)

**The Honors and Awards Committee**

The Committee shall receive and review all requests for Auxiliary Honorary Membership and shall be responsible for determining the eligibility of candidates submitted by petition to receive the award of Honorary Member. The recipient is given a certificate of appreciation. (See Appendix VIII for a sample of the petition.

**Auxiliary Travel and General Reimbursement**

**The President**

The President shall submit expenses using the ASME Volunteer Travel Expense Contribution Form. – Appendix IX.

Airfare will be provided for two (2) Board Meetings per year (lowest fare possible), or auto mileage reimbursement according to the IRS guidelines. However, for roundtrips over 1000 miles, the contribution shall not exceed $575.00 under non-emergency travel conditions.

Hotels for up to three (3) nights at conference hotel for The Congress and Annual Meeting held in June, per the ASME Travel Expense Contribution Policy P-4.5. Meal breakdown as follows;

- **Sunday** – one meal, Members and Students Luncheon as ASME guest
- **Monday** – No meals. May attend President’s Luncheon and Honors Dinner as ASME guest
- **Tuesday** – Auxiliary Luncheon
The Officers of the Board

The Officers shall submit expenses using the designated Auxiliary Expense Form – Appendix X

The officers listed below will have Airfare provided for (2) Board Meetings per year (lowest fare possible), or auto mileage reimbursement according to IRS guidelines. However, for roundtrips over 1000 miles, the contribution shall not exceed $575.00 under non-emergency travel conditions. Meals and hotel are not reimbursed.

- Executive Vice President
- Recording Secretary
- Corresponding Secretary
- Treasurer
- Student Loan Treasurer

Student Loan and Scholarship Chairs

The Student Loan and Scholarship Chairs will have Airfare provided for (2) Board Meetings per year (lowest fare possible), or auto mileage reimbursement according to IRS guidelines. However, for roundtrips over 1000 miles, the contribution shall not exceed $575.00 under non-emergency travel conditions. Meals and hotel are not reimbursed.

Miscellaneous Expenses – At the discretion of the President, a motion can be made to approve any miscellaneous expenses that may arise. The President shall check with the Treasurer to see if funds are available before making a motion.

General Reimbursement

All Officers and National Board members shall be reimbursed for expenditures such as postage, duplication charges, telephone, and supplies. Conference registration fees for attending Board meetings may be reimbursed as needed. Please submit your general expenses on the designated Auxiliary Expense Form, Appendix X to the Auxiliary Treasurer.

Submitting Expenses

All expense forms and receipts must be submitted to the President for signature before or at the Auxiliary National Board Meetings. The President’s travel expenses shall be approved by the Treasurer and signed for by the ASME Staff Coordinator.

Expense forms shall be submitted within two weeks after an Auxiliary Meeting to the ASME Accounting Department by the Auxiliary Staff Administrator in conjunction with the Auxiliary Treasurer.

The ASME Fiscal Year ends on June 30. All expenses and receipts must arrive at the Auxiliary Staff Coordinator office before June 30 or a list of expenses to be accrued.

Auxiliary Logo, Seal and Badges

The four leaf clover is the official logo of the Auxiliary
The Auxiliary seal shall be used on all certificates from the Auxiliary. The seal shall reside with the Auxiliary Staff Coordinator.

Elected Auxiliary Officers shall receive a white badge with blue lettering with the Auxiliary Logo. Past Auxiliary Presidents shall receive a blue badge with white lettering and the Auxiliary Logo.

Certificate Process
All scholarship certificates are provided to each student in an electronic format. However, for any presentation where a certificate is required, a hard copy will be produced. All certificates are required to have the appropriate signatures and the Auxiliary Seal.

Certificates given by the Auxiliary – Appendix XI

Dedicated Service Award – Certificate and Seal provided by the ASME Honors and Awards Department
Honorary Membership – Certificate of Appreciation printed by the Auxiliary
Certificate of Appreciation – a certificate given to presenters at Auxiliary Events, for Honorary Memberships and other designated achievements at the discretion of the Auxiliary President.
Scholarship Certificates – generated electronically unless being presented in person.

Undergraduate Certificates
All undergraduate certificates shall have Auxiliary President and Scholarship Chair signatures.
- Irma and Robert Bennett Scholarship
- Berna Lou Cartwright Scholarship
- Sylvia W. Farny Scholarship
- Charles B. Scharp Scholarship
- Carolyn and James M. Chenoweth Scholarship
- Allen J. Baldwin Scholarship
- Agnes Malakate Kezios Scholarship

Masters Certificates
- Marjorie Roy Rothermel – Auxiliary President and Scholarship Chair Signatures

Doctorate Certificates
- Elisabeth M. and Winchell M. Parsons Scholarship - Auxiliary President and Scholarship Chair Signatures

Lucy and Charles W. E. Clarke Scholarship Certificates
- Lucy and Charles W. E. Clarke – Auxiliary President and Clarke Committee Chair Signatures

**Welcome Packet – Appendix XII**

Each new member shall receive a welcome packet and a copy of the Auxiliary By-Laws and Constitution.
Our Current Leadership

President
Benetta Cook

Executive Vice President
Linda Sims

Recording Secretary
Vatsala Menon

Corresponding Secretary
Ella Baldwin- Viereck

Treasurer
Stella Seiders

Student Loan Fund Treasurer
Ed Seiders

Promoting Engineering Education through Scholarships & Loans

Student Testimonies

“I look forward to encouraging other ME Students to get involved with the ASME Auxiliary and ASME. Thank you for your generous gift of a scholarship.”

X. Wang recipient of the Marjorie Roy Rothermel Scholarship.

“I have worked hard to avoid taking on debt from my education as much as possible, and the generosity of the ASME Auxiliary and the Bennett family will greatly enhance my ability to do that for the remainder of my education. It means so much to me to receive this award from an organization that has helped to inspire me and keep me informed and connected to the Mechanical Engineering community.”

M. Lacy recipient of the Irma & Robert Bennett Scholarship.
The Auxiliary History

The ASME Auxiliary Inc., established in 1923 and incorporated as a charitable non-profit organization in 1977, establishes and supports scholarships and loans to students of mechanical engineering at both the graduate and undergraduate levels. It also supports the objectives of ASME International to promote the advancement of the art, science, and practice of mechanical engineering.

Auxiliary Objectives

To establish education funds for the purpose of assisting worthy students in the study of mechanical engineering or for graduate work.

To promote, independently or in conjunction with ASME, the advancement of the art and science of mechanical engineering and the dissemination to engineers and the general public of advances and new developments in mechanical engineering.

Scholarships

Lucy and Charles W. E. Clarke Scholarship
To an entering freshman for the first year of undergraduate study in mechanical engineering (ME) or mechanical engineering technology who has participated on a FIRST Robotics Team in High School.

Allen J. Baldwin Scholarship
To a student for the final year of undergraduate study in mechanical engineering

Berna Lou Cartwright Scholarship
To a student for the final year of undergraduate study in mechanical engineering

Carolyn and James M. Chenoweth Scholarship
To a student for the final year of undergraduate study in mechanical engineering

Sylvia W. Farny Scholarship
To a student for the final year of undergraduate study in mechanical engineering

Elisabeth M. and Winchell M. Parsons Scholarship
To a student working toward a doctoral Degree in mechanical engineering

Rice-Cullimore Scholarship
To a foreign student for one year’s maintenance while doing graduate study in engineering in the United States

Marjorie Roy Rothermel Scholarship
To a student working toward a master’s degree in mechanical engineering

Agnes Malakate Kezois Scholarship
To a student for the final year of undergraduate study in Mechanical Engineering

Charles B. Sharp Scholarship
A memorial scholarship fund for undergraduate study in engineering

Student Loan Fund
Interest free until graduation, loans are available to junior, senior, and graduate students in mechanical engineering

Getting Involved

The ASME Auxiliary is always looking for enthusiastic members to read scholarship applications and run for National Auxiliary Officers.

Please contact the following scholarship committee chairs if you are interested in being a reader.

Lucy and Charles W. E. Clarke Scholarship; Lynn Gerber gordandlynn@roadrunner.com

Undergraduate Scholarships; Sara Sahay uma.sahay@gmail.com

Master’s Degree; Kay Simmons kathynejane@hotmail.com

Doctorate Degree; Cindi Pool cindipool@gmail.com

Visit our community website at go.asme.org/auxiliary to read our bi-
annual Pipeline Newsletter, review all position job details and get information on our upcoming meetings and other exciting news.
<table>
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<td>Benetta Cook</td>
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ASME Dedicated Service Awards

1984 Helen Keyes
1985 Ida Mae Harman
1986 Jean Forstall
1987 Marge Diederick
1988 Irma Bennett
1989 Helene Sherwood
1990 Ruth Volkoun
1991 Virginia Kline
1992 Bonnie Cockrell
1993 Emma Kotnick
1994 Mary Kleinhenz
1995 Martha Geyer
1996 Billye Smurr
1997 Marion Belcher
1998 Trudy Miller
1999 Letta Fowler
2000 Anna Lou Fall
2001 Lynn Gerber
2001 Marcia Zwiep
2002 Susan Hawthorne
2003 Carolyn Chenoweth
2004 Libby Prochaska
2005 Julie Parsons Cole
2006 Alverta Cover
2007 Janet Watson
2008 Barbara Goldstein
2009 Mary Snyder
2010 Nina Webb
2011 Betty Cochran
2012 Benetta Cook
2012 Karen Malesky
2012 Myrna Zamrik
2013 Esther Rosenberg and Ella Baldwin-Viereck
2014 Margaret Holdredge
2015 Stella Seiders
2016 Joy Dingman
Honorary Membership Awards
Lillian Gilbreth
Sylvia Farny
Eliza Wright
Eveleyn Hickox
Dorothy Miller
Edith Van Alst Cullimore
Hattie Friend
Agnes Larkin
Margaret Moss
Ethel Boyer
Irma Bennett
Helene Sherwood
Martha Geyer
Carolyn Chenoweth
Susan Hawthorn
Janet Watson
Joy Dingman
Marcia Zwiep
Application for Membership

The American Society of Mechanical Engineers Auxiliary, Inc.
Two Park Avenue, 7-3A
New York, NY 10016-5990, U.S.A.

Date _____________________________
Name ____________________________
Address_________________________________
________________________________________
__ __________________________
Telephone _________________________
E-mail ____________________________
I am a member of the immediate family of

Type of Membership Desired:
Member-at-Large ________
Section ________ Life _________
I wish to receive my annual ballot,
_____Online/Email _____Paper/Mailed
Signature __________________________

Member-at-Large Membership Dues
1. The annual fee for Members-at-Large is $25.00.
2. The one-time fee for Life Members is $150.00.

New members may join onsite at the IMECE or the Annual Meeting of the Society; or mailing the attached application to the current Auxiliary Membership Records Chair or to ASME, Mail Stop 7-3A Two Park Avenue, New York, NY 10016-5990.

“I look forward to encouraging other ME Students to get involved with the ASME Auxiliary and ASME. Thank you for your generous gift of a scholarship.”

X. Wang recipient of the Marjorie Roy Rothermel Scholarship.

“I have worked hard to avoid taking on debt from my education as much as possible, and the generosity of the ASME Auxiliary and the Bennett family will greatly enhance my ability to do that for the remainder of my education. It means so much to me to receive this award from an organization that has helped to inspire me and keep me informed and connected to the Mechanical Engineering community.”

M. Lacy recipient of the Irma & Robert Bennett Scholarship.

Appendix I

The ASME Auxiliary

Promoting Engineering Education through Scholarships & Loans

An Enduring Commitment

Two Park Avenue, 7-3A
New York, NY 10016-5990
U.S.A.
212-591-7397
The Auxiliary History

The ASME Auxiliary Inc., established in 1923 and incorporated as a charitable non-profit organization in 1977, establishes and supports scholarships and loans to students of mechanical engineering at both the graduate and undergraduate levels. It also supports the objectives of ASME International to promote the advancement of the art, science, and practice of mechanical engineering.

Auxiliary Objectives

To establish education funds for the purpose of assisting worthy students in the study of mechanical engineering or for graduate work.

To promote, independently or in conjunction with ASME, the advancement of the art and science of mechanical engineering and the dissemination to engineers and the general public of advances and new developments in mechanical engineering.

Scholarships

- **Lucy and Charles W.E. Clarke Scholarship**
  To an entering freshman for the first year of undergraduate study in mechanical engineering or mechanical engineering technology who has participated on a FIRST Robotics Team in High School.

- **Allen J. Baldwin Scholarship**
  To a student for the final year of undergraduate study in mechanical engineering

- **Berna Lou Cartwright Scholarship**
  To a student for the final year of undergraduate study in mechanical engineering

- **Carolyn and James M. Chenoweth Scholarship**
  To a student for the final year of undergraduate study in mechanical engineering

- **Sylvia W. Farny Scholarship**
  To a student for the final year of undergraduate study in mechanical engineering

- **Elisabeth M. and Winchell M. Parsons Scholarship**
  To a student working toward a doctoral Degree in mechanical engineering

- **Rice-Cullimore Scholarship**
  To a foreign student for one year’s maintenance while doing graduate study in engineering in the United States

- **Marjorie Roy Rothermel Scholarship**
  To a student working toward a master’s degree in mechanical engineering

- **Agnes Malakate Kezois Scholarship**
  To a student for the final year of undergraduate study in Mechanical Engineering

- **Charles B. Sharp Scholarship**
  A memorial scholarship fund for undergraduate study in engineering

- **Student Loan Fund**
  Interest free until graduation and with no deadline, loans are available to junior, senior, and graduate students in mechanical engineering

TO BECOME A MEMBER OF THE ASME AUXILIARY:

To Join:
Fill out the form provided.

Make your check payable to the ASME Auxiliary, Inc.

Section Member:
Give the form and your check for Section dues to the Section Treasurer. The Section Treasurer will then mail the form and a check for Auxiliary dues of $5 to the current Auxiliary Treasurer.

Member-at-Large:
Mail the form and your check to the current Auxiliary Treasurer or join at the Congress or the Annual Meeting of the Society, or by sending to ASME, Mail Stop 7-3A Two Park Avenue, New York, NY 10016-5990.

Information about scholarships and loans can be found at;

[go.asme.org/scholarships](http://go.asme.org/scholarships)
[go.asme.org/loans](http://go.asme.org/loans)

Revised February 23, 2016
ASME AUXILIARY PRESIDENT’S RESPONSIBILITIES

July

Approve meeting minutes
Approve Auxiliary list for ASME’s AC-10 Directory

August

Interim Meeting with ASME Auxiliary Staff Coordinator
   Receive update on scholarship payments
   Receive update on November Luncheon Speaker
Submit letter for Pipeline

September

Interim meeting with officers and executive committee
   Review agenda items for November Meeting
   Discuss any new or outstanding business for November Meeting
Register for IMECE

October

In conjunction with ASME Auxiliary Staff Coordinator, prepare/approve agenda for National Board Meeting at the IMECE.

Prepare 2 – 3 minute speech for Presidential Luncheon at the IMECE. Forward a copy to ASME Auxiliary Staff Coordinator.

Work with Nominating Committee to find volunteers to run for office.

Ensure agenda is sent out one week prior to the meeting.

November

Attend President’s Luncheon on Monday at the IMECE and give speech.
Attend other ASME sessions and promote the Auxiliary.
Chair the National Board Meeting during IMECE.
Sign off on expense reports at the meeting
Meet with the ASME Controller and Auxiliary Treasurer for the Auxiliary Audit
**December**

Review and approve meeting minutes
Send notes to officers and committee chairs thanking them for their time. (Optional)

**January/February**

Appoint someone to install the officers during the Auxiliary Annual Meeting at the ASME Annual Meeting or contact someone by e-mail/letter to install the officers. (Sometimes it is easier to get a commitment in person.)
Sign off on Auxiliary’s 990 Tax forms.

**March**

Interim meeting with officers and executive committee
Review agenda items for June Meeting
Discuss any new or outstanding business from November Meeting
Update on speaker for June Luncheon
Discuss DSA, honorary memberships and certificates

Write letter for the Spring Pipeline
Review/Approve Biographical information for the ballot which will be part of the Spring Pipeline

Get updates from Auxiliary Treasurer on the final numbers for scholarships.

**April/May**

In conjunction with the Auxiliary ASME Staff Coordinator, prepare Agendas for the Auxiliary’s National and Annual Board Meetings.

Appoint tellers for the Ballot count at the Annual Meeting in June.

**June**

Chair the ASME Auxiliary National Board Meeting, scheduled on Monday.

- **Ballot Results**
  - Results are announced at the National Board Meeting.
  - The ballots are delivered by Headquarters to the ASME Annual Meeting.

- Scholarships are awarded and approved
Chair the Annual Meeting, scheduled on Tuesday

Committee Chairs provide their reports.
Results of the ballot are announced.
New officers are inducted at the end of the meeting.
Incoming Auxiliary President assumes duties at the close of the meeting.

Special Meeting

Incoming President chairs a special called meeting of the National Board immediately following the Annual Meeting to elect two board members, by secret ballot, to the Honors and Awards Committee.

Shall appoint additional members and four alternates to the Executive Committee.

Shall fill any Board vacancies by appointment if necessary.

June/July

The Minutes of the Auxiliary Board Meeting and the Auxiliary Annual Meeting are the responsibility of the outgoing President.

Revised
November 2, 2015
Appendix III

The Lucy and Charles W. E. Clarke Scholarship Committee Process

1. **There will be 3 teams of 2**

2. **Training**

   Prior to reviewing the applications, committee members will be trained on how to access and view the applications from the Wizehive website.

3. **Round One**
   a. Each team member will have access to a designated number of applications to review.
   b. Each team member shall review the applications on their own
   c. Each team should discuss their individual rankings with their partner to be sure they are in agreement before submitting to ASME Staff.
   d. Each team returns one ranking sheet to the ASME Staff either via email or fax.
   e. ASME Staff will enter all final data into a round one (1) master sheet.
   f. The Top five (5) ranked students from each Team will be chosen for Round Two
      i. The top five are taken even if some scores are lower because judges may be tougher during their ranking. This is why we tally both round 1 and round 2 numbers for the final results.

4. **Round Two**
   a. Teams will stay the same
   b. Each team member will have access to their designated round two (2) applications to review
   c. Each team member shall review the round two (2) applications on their own
   d. Each team should discuss their individual rankings with their partner to be sure they are in agreement before submitting to ASME Staff.
   e. Each team returns one ranking sheet to the ASME Staff either via email or fax.
   f. ASME Staff will enter all final data into a round two (2) master sheet

5. **Final Round Results**
   a. Tally numbers from Round 1 and Round 2 to find combined final score
   b. The top twelve (12) students will be named

6. **Final Meeting**
   a. The committee will be notified of the top twelve (12) students and results will be discussed at the final meeting.
   b. Top twelve (12) students will be voted and approved.
   c. The committee will then choose the top number of students based on the number of scholarships being awarded in a given year.
   d. Other committee business will be identified in the Agenda
7. **How to rank the applications**
   a. **Contribution Rating (weighted x5)**
      i. Contribution Rating, on a scale of 1-10, rate the student’s technical, leadership, and creative contribution, based upon the nomination letter, letter of support and other supporting (resume) information about student activities.

   b. **Academic Merit Rating (weighted x2)**
      i. Academic Merit Rating, on a scale of 1-10, rate the student’s academic merit, based on the GPA information provided.
Lucy and Charles W. E. Clarke Scholarship Portal Instructions

This is the template for accessing the applications each year. Various usernames and passwords will be altered each year.

ASME Scholarship Review Portal, [Hosted by WizeHive]
Instructions: 2016 Lucy and Charles W. E. Clarke Scholarship.


1. Type in Username and Password.
   
   Your username is your email address and the password for everyone is “20165clarke”

2. Click on the Login button.
You will see a similar page with instructions and matrix on how to review the applications

If you scroll down more you will see the bottom half of the page.

3. Click on the green Review button to open up an application.

Example: REVIEW – Jonathan Hitchcock

4. Click on the green Add Review button to bring up the rating area.
5. If you know the applicant and want to be recused simply click on YES

Jonathan Hitchcock

If you don’t need to be recused please click on NO and it will bring you to the ranking page.
From here you can scroll each side separately. Please note on the application side you will need to click on the tabs above to review the student’s transcript and letters. At any time you may print out the application by clicking on the Print Icon.

Once you have completed your review you may either save your work as a draft or submit it. Once you have submitted your work it is final.
You may use the “Previous”, “Return to Listing”, or “Next” buttons to continue reviewing applications.

Once your team has assigned one person to go in and complete the scoring, please send RuthAnn an email.
bigleyr@asme.org.
Undergraduate, Master's and Doctorate Procedures

Students may obtain the application for these scholarships as go.asme.org/scholarships. One online application is use for all ASME Scholarship and these Auxiliary Scholarships. The application is hosted by an outside vendor called WizeHive.

In May, the various scholarship committees are given access into WizeHive to review and rank their scholarship applications. The Undergraduate Scholarship Committee Chair will participate in the selection of scholarship in conjunction with the chairs of the ASME Scholarship Program. The selected recipient names will then be presented at the Auxiliary’s Board Meeting at the ASME Annual meeting in June. The Master’s and Doctorate Scholarship Committee select their own scholarship recipients and will also present their selected recipients at the Auxiliary's Board Meeting at the ASME Annual Meeting in June.

Procedure Template for the Scholarship Committees

Instructions: 2016 Auxiliary Scholarships

ASME Scholarship Review Portal, [Hosted by WizeHive]

Copy and Paste this URL - https://review.wizehive.com/voting/login/asmeauxscholarship
1. Type in Username and Password.

Your username is your email address and the password for everyone is “2016aux” (case sensitive)

2. Click on the Login button.

You will see a similar page with instructions and matrix on how to review the applications
If you scroll down more you will see the bottom half of the page.

3. If you are reviewing both Undergraduate or Graduate applications, you may need to determine which tab you should be using and then click on the green Review button to open up an application.

Example: REVIEW – Joshz+1@wizehive.com

4. If you know the applicant and want to be recused simply click on YES.

5. If you don’t need to be recused please click on NO and it will bring you to the ranking page.
From here you can scroll each side separately as you review the application. Please note on the application side you will need to click on the tabs above to review the student’s transcript and letters. At any time you may print out the application by clicking on the Print Icon.
Once you have completed your review you may either save your work as a draft or submit it. Once you have submitted your work it is final.

You may use the “Previous”, “Return to Listing”, or “Next” buttons to continue reviewing applications.
Once you have completed your scores, please notify RuthAnn by email, bigleyr@asme.org.
Rice-Cullimore Procedures

The Institute of International Education (IIE.org) provides the Rice-Cullimore Scholarship Committee with hard copy applications to review. The Committee will select the number of receipts based on the number of scholarships that can be offered in any given year.

The recipients are then notified by the Rice-Cullimore Committee Chair. The Auxiliary Staff Coordinator is also notified and will contact the recipients in order to obtain the necessary documents needed in order to process the scholarship check.

Once the checks are sent, the Auxiliary Staff Coordinator will forward a memo to the membership department and request a one year free membership for the scholarship recipients.

Memo Template

January 5, 2016

To: John Beck - Membership

Please have $75.00 transferred from the Rice – Cullimore Scholarship Fund, 9-00301105 to pay for a one year Student Memberships for;

(student’s name and ASME ID number) – Staff may have to create an ID record.

Thank you in advance for your time.

RuthAnn Bigley
Process for ASME Auxiliary Student Loans

1. Student applies for a loan on the official ASME Auxiliary Student Loan Application. (Appendix I)
2. Completed Application is sent to the Chair of the ASME Auxiliary Student Loan Fund.
3. The application is then reviewed by members of the ASME Auxiliary Student Loan Fund.
4. An acceptance or denial letter will be sent to the student. (Appendix VI b or Appendix VI c)
5. If approved, a promissory note will be sent along with the letter of acceptance. (Appendix VI d)
6. Once the Promissory Note is received the following document shall be sent to Ann-Marie Beck in the New Jersey office.
   a. a copy of the completed Student Loan Application (Appendix VI a)
   b. a copy of the letter of acceptance of the loan (Appendix VI b)
   c. the completed Promissory Note (Appendix VI d)
   d. a copy of the Authorization for Payment Form (Appendix VI e)
   e. the signed letter to accompany the check to the student - (Appendix VI f)
7. Once the check has been cut, a copy of the check shall be forwarded to the Student Loan Treasurer and ASME Staff Coordinator and the original check sent to the student along with the provided letter.
8. The student’s loan will then be added into the LMS system in New Jersey.
9. A month before the student needs to start paying back the loan, a letter from the ASME Staff Student Loan Fund Coordinator will go out to the student with a copy of the original Promissory Note regarding details of the loan repayment. (Appendix VI d)
   a. Payments will be made via Check, money order or wire transfer
      Check/Money Order– Payable to the ASME Auxiliary
      Wire Transfer - Woman’s Auxiliary To The American Society Of Mechanical Engineers Inc.
      Auxiliary Student Loans
      Acct. No. 619720829
      ABA. 021000021
10. New Jersey will deposit the checks into the proper account and update the student’s account in LMS.
11. The New Jersey office will provide the ASME Auxiliary Student Loan Treasurer with a monthly statement of all ASME Auxiliary loans.
12. It is the responsibility of the ASME Auxiliary Student Loan Treasurer to follow up with delinquent accounts.
13. If the student’s loan is in arrears more than 90 days, the student shall be notified via Certified Mail by the ASME Auxiliary Student Loan Treasurer. If the account is not paid to
date, the account will be sent to a collection agency by the New Jersey Student Loan Department.
The ASME Auxiliary

Student Loan Application Guide

administered by the ASME Auxiliary

The **ASME Auxiliary Student Loan Fund** operates in accordance with **Society Policy P-13.2** using the following qualifications and procedures:

**Loan Amounts**

The maximum loan amount is **$5,000 per student**. Qualified students may accumulate no more than $5,000 in ASME Auxiliary student loans during their full-time undergraduate or graduate studies. The annual and total borrowing limits are set by the ASME Auxiliary.

**Loan Interest**

ASME Auxiliary loan bears interest at a rate of 4% per annum on the outstanding principal balance, beginning the first of the month immediately following graduation, change or termination of student status. The loan plus accrued interest is to be paid in thirty-six (36) equal consecutive monthly payments commencing within six (6) months after graduation. The default interest rate is 12%. There will be no penalty for early loan repayment.

**Application Deadline**

Applicants must be ASME members or student members majoring in Mechanical Engineering or a closely related program, and submit a completed application to the ASME Auxiliary Student Loan Fund Chair:

Rajan Menon  
Chair, ASME Auxiliary Student Loan Fund  
3489 Milton St. N  
Shoreview, MN 55126  
Email: menonrajk@gmail.com

With a copy sent to:  
loans@asme.org

**Eligibility**

To be considered for a loan, a student must satisfy the following criteria:

a. Be an **ASME Student Member** in good standing for at least one year and until your loan is Paid in Full.

b. Be a U.S. Citizen

c. Be enrolled in full-time academic studies in the **U.S.** and making satisfactory progress in his or her degree program in Mechanical Engineering, Mechanical Engineering Technology or closely related program.

d. **Have a minimum GPA of:**  
   
   **2.20 on a 0 to 4.00 scale**  
   (Undergraduate Students)  
   **3.20 on a 0 to 4.00 scale**  
   (Graduate Students)

   e. Have a demonstrated financial need.
Evaluation Criteria

If the number of qualified applicants exceeds available funding preference for loans will be given to qualified:

1. Undergraduate: Upper Division Students (Juniors and Seniors)
2. Graduate: 2nd Year Masters Degree Students
3. Undergraduate: Lower Division Students
4. Other Students

This is not meant to discourage qualified freshmen, sophomores and graduate students from applying, but indicates that loans are first made to qualified undergraduate, upper-class students.

For evaluation purposes, no distinction is to be made between "academic year" loans and "summer term" loans.

The following guidelines are used to evaluate and rank the applicants:

- Financial need
- Academic performance
- Participation in ASME activities
- Assessment of risk of default

All monies available for loans in a given year need not be awarded, if the number of qualified applicants is insufficient.

Repayments & Default

The initial monthly payment of the 36-month repayment series is due on the first day of the month, six (6) months after completion of degree requirements for which the loan is granted or termination of full-time enrollment in that degree program. The loan will bear interest at a rate of 4% per annum on the unpaid principal balance beginning the first of the month immediately following graduation, change or termination of student status. The loan plus accrued interest is to be paid in thirty-six (36) equal consecutive monthly payments commencing within six (6) months after graduation and repayment must begin. The default interest rate is 12%. If your ASME student membership is in default, the loan shall be automatically due in full.

Extensions

A one-time Graduate Education Extension may be awarded to qualified students who are enrolled in full-time studies towards a Masters or PhD Degree in Mechanical Engineering or Mechanical Engineering Technology. Loan recipients wishing to request a one-time Graduate Education Extension of repayment should make a written request to the screening committee at least one month prior to the end of the grace period. The written request should include:

a. A transcript of previous work completed.
b. A copy of a letter of acceptance to a graduate school.
c. A summary of the proposed plan for the graduate studies.
d. An estimated date of graduation.
e. Complete information on any other sources of financial assistance.
f. Proof of current ASME membership status.

If the request is approved, the loan repayment is postponed without interest until after completion or termination of full-time graduate studies. At that time, the repayment schedule begins. There is no additional grace period once a Graduate Education Extension has ended.
Requests for an extension of the loan repayment to begin graduate studies will be evaluated based on the following considerations:

a. The availability of funds.
b. The probable success of the applicant.
c. The need of the applicant.
d. The appropriateness of the graduate program proposed.
e. Continued membership in ASME.

Thorough attention should be given to all parts of the application; e.g. personal information, including citizenship; financial information; references signatures/names and addresses. The references must be someone who will be able to provide ASME with your address if you have relocated, i.e., a parent, guardian or relative living in North America. In the case that the loan application is approved, you and two co-signers will be required to sign a promissory note before receiving the loan funds. The co-signers must be willing and able to re-pay the loan if you are not able. The borrower’s spouse or another student are not acceptable co-signers. In the event that the applicant is awarded an ASME Auxiliary Student Loan and defaults during the repayment period, the co-signers will be called upon to fulfill the financial obligation to repay this loan in full and on demand.

**Two (2) copies of the completed and signed loan application must be returned along with one (1) current transcript. The transcript must be official and show your GPA plus your current enrollment status.**

The written recommendation and signature by the Chair of the Department, the Dean of Engineering or ASME Student Section Advisor is required.

The academic institution and Department Head, Dean of Engineering and ASME Student Section Advisor bear no financial liability under this program and principally attest to the applicant's academic status and performance.

Application Mailing Address:

Rajan Menon  
Chair, ASME Auxiliary Student Loan Fund  
3489 Milton St. N  
Shoreview, MN 55126  
Email: menonrajank@gmail.com

With a copy to:  
loans@asme.org
APPLICATION FOR STUDENT LOAN

For Qualifications, see Information Sheet

Every question must be answered fully. Do not answer any question with a check mark. If the answer is "None" or "Not Applicable", it should be so stated. Information supplied will be treated confidentially. (Keep a copy of this form for your own information.)

TYPE OR NEATLY PRINT

Name___________________________________________

Last       First       Middle       Social Security No.

Grade and Number of ASME membership________________________________________

Permanent mailing address (to which mail by be sent when you are out of school) ________________

Street              City           State           Zip

E-Mail Address ___________________________________________________________________________________

Date of Birth _________ Place of Birth_______________________________________________________________

Citizen of U.S.A.? ___________ If naturalized, where? ___________________ When ________________

Your marital status _____________________ Name of spouse ________________________________

Number of children ____________________ Ages of children _________________________________________

How many dependents? ________________________________________________________________

Is your spouse employed? __________________________ His or her annual income ________________

Name of father __________________________________ Occupation __________________________

Name of mother __________________________________ Occupation __________________________

Mailing address of both with zip code Telephone No. __________________________

___________________________________________________________________________________________

___________________________________________________________________________________________

Name of College _____________________________ Address _________________________________

Your address at college Street              City          State           Zip           Telephone

Date you entered college ___________________ Expect to graduate ___________________________

Month/year                          Month/year
Name of Chair of the Department, the Dean of Engineering, or Faculty Advisor of ASME Student Chapter (print or type):
____________________________________________________________________________

Address of Chair of the Department, the Dean of Engineering, or Faculty Advisor of ASME Student Chapter (print or type)
____________________________________________________________________________
____________________________________________________________________________

E-mail of Chair of the Department, the Dean of Engineering, or Faculty Advisor of ASME Student Chapter (print or type)
____________________________________________________________________________

Have your faculty reference send a letter of recommendation on school stationery to the same address as your completed application.

Give name, address, e-mail address, phone number and occupation of two (2) references (someone who will be able to provide ASME with your address if you have relocated, i.e., a parent, guardian or relative living in North America). Do not use same names as appear under “Recommendation of the Chair of the Department, the Dean of Engineering, or Faculty Advisor of ASME Student Chapter”. Be certain contact information is correct and complete. Contact references advising that you used their names and to respond quickly when contacted by the Student Loan Committee.
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________

What is the amount of your present indebtedness to individuals, to government student loans, banks, etc. (attach additional pages, if needed):
$____________________________________________________________________________
Give amounts and terms of payment____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
List real and personal property, if any, owned by you or held in trust for you
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________
____________________________________________________________________________

Have you served in the Armed Forces? ____________________________________________
Are you eligible for Veterans’ Educational Benefits? ________________________________
What is the amount you expect to receive? ________________________________________
Give a list of employment and part-time work during college years with names and addresses; attach additional pages, if needed:

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

<table>
<thead>
<tr>
<th>FINANCIAL STATEMENT</th>
<th>ENTIRE ACADEMIC YEAR</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Personal funds</strong></td>
<td></td>
</tr>
<tr>
<td>a. Savings</td>
<td></td>
</tr>
<tr>
<td>1. From summer work $______</td>
<td>Tuition $______</td>
</tr>
<tr>
<td>2. Other Sources $______</td>
<td>Fees ______</td>
</tr>
<tr>
<td>b. Trust Income $______</td>
<td>Books &amp; Supplies ______</td>
</tr>
<tr>
<td>c. Other personal funds $______</td>
<td>Housing ______</td>
</tr>
<tr>
<td><strong>From relatives, guardian or friends</strong></td>
<td></td>
</tr>
<tr>
<td>a. Parents Support ______</td>
<td>Organization fees and dues ______</td>
</tr>
<tr>
<td>b. Loans or advances ______</td>
<td>Recreation ______</td>
</tr>
<tr>
<td><strong>Scholarships</strong></td>
<td></td>
</tr>
<tr>
<td>a. State tuition ______</td>
<td>Transportation ______</td>
</tr>
<tr>
<td>b. State cash ______</td>
<td>Insurance ______</td>
</tr>
<tr>
<td>c. Other ______</td>
<td>Interest on other loans ______</td>
</tr>
<tr>
<td><strong>Earnings</strong></td>
<td></td>
</tr>
<tr>
<td>a. ROTC ______</td>
<td>Other expenses (explain) ______</td>
</tr>
<tr>
<td>b. Veterans subsistence ______</td>
<td>Total expenses $______</td>
</tr>
<tr>
<td>c. Cash jobs ______</td>
<td></td>
</tr>
<tr>
<td>Total resources $______</td>
<td></td>
</tr>
</tbody>
</table>

Amount of loan applied for from the Student Loan Fund of the American Society of Mechanical Engineers Auxiliary, Inc. $__________________________

Term and Year for which the loan is requested ___________________________ Fall / Spring / Summer, Year
In making this application, I have carefully read the Student Loan Fund Information Sheet and Loan Application Form and will be bound by the statement therein. I have read my answers and do affirm the correctness of every statement. I promise to use this loan for no purpose other than the necessary expenses of continuing my education in Mechanical Engineering or related graduate or undergraduate program. I also promise to answer promptly letters relating to the loan, and to keep the Student Loan Fund Chair and ASME Loan Department informed of my correct address and advised of the character of my work and remuneration as long as my indebtedness remains unpaid. I also affirm that I have prepared the foregoing application and understand that the loan, if granted, is to draw interest at the rate of 4% on the unpaid principal balance beginning the first of the month immediately following graduation, change or termination of student status. The loan plus accrued interest is to be paid in thirty-six (36) equal consecutive monthly payments commencing within six (6) months after graduation or termination of the course of study, and if it is not repaid in full between six (6) and forty-two (42) months, it will be referred to a collection agency.

One extension may be granted, upon approval of the ASME Auxiliary Student Loan Committee, for completion of graduate studies.

Should this loan application be approved, you and two co-signers will be required to sign a promissory note stating these terms. The two co-signers will be responsible for repayment of the outstanding principal in the case that you are not able.

Date ___________________________  
Name of Applicant, Neatly print or type

________________________________________________________________________

Signature of Applicant

Return the completed application to:
Rajan Menon  
Chair, ASME Auxiliary Student Loan Fund  
3489 Milton St. N  
Shoreview, MN 55126  
Email: menonrajank@gmail.com

With a copy to:
loans@asme.org
Accompanying Documents and Copies of Application

Please attach ALL of the following documents with your application.

A) **Two (2) copies** of the Student Loan application and all additional documents.
B) Official transcript must show GPA plus your current enrollment status.
C) Recommendation letter of Chair of the Department, the Dean of Engineering, or Faculty Advisor of ASME Student Chapter

Send two copies of your application and all forms listed above to:

Rajan Menon  
Chair, ASME Auxiliary Student Loan Fund  
3489 Milton St. N  
Shoreview, MN 55126  
Email: menonrajank@gmail.com

With a copy to:  

loans@asme.org

How Did You Learn About The ASME Auxiliary’s Student Loan Program (please check one):

☐ Fellow Student  
☐ ASME Website  
☐ ASME E-mail Notice  
☐ Other (Please specify):  
☐ Faculty Advisor/Dept. Head  
☐ College Financial Aid Office

Funding for ASME Auxiliary Student Loans is provided by The ASME Auxiliary.

Application Check List

☐ Check the eligibility requirements in the Application Guide to make sure you qualify.
☐ Ask for the Chair of the Department, the Dean of Engineering, or Faculty Advisor of ASME Student Chapter signature and brief recommendation.
☐ Review and compile all estimated expenses for the Academic year (Fall 20__ to–Fall 20__) (tuition and fees, room and board, loans, miscellaneous educational expenses, personal expenses, credit cards, etc.). You should base these numbers on anticipated expenses and expenses from past years.
☐ Request an Official Transcript from your University (which must include your GPA and enrollment status).

BEFORE YOU SEND IN THE APPLICATION MAKE SURE YOU HAVE;

☐ All necessary Signatures; 1) Department Head, 2) References, and 3) You the Applicant
☐ All documents to be attached to the Application Form;

☐ **Two (2) copies** of the completed ASME Auxiliary Student Loan Application
☐ One (1) Official Transcript from current institution (this may be sent directly from your school to ASME
Rajan Menon  
Chair, ASME Auxiliary Student Loan Fund  
3489 Milton St. N  
Shoreview, MN 55126

DATE:___________

Student’s Name  
Address  
City, State Zip

Dear “Student”;  

The ASME Auxiliary is pleased to offer you a student loan for $xxxx.xx.

Attached is a Promissory Note to be completed, notarized and returned to me before your check can be processed and forwarded to you.

If you have any questions please do not hesitate to contact me.

Warm Regards,  

Rajan Menon  
Chair, ASME Auxiliary Student Loan Fund  
menonrajank@gmail.com
Rajan Menon  
Chair, ASME Auxiliary Student Loan Fund  
3489 Milton Street N  
Shoreview, MN 55126

DATE:________

Student’s Name  
Address  
City, State Zip

Dear “Student”;  

Thank you for submitting your application for a student loan. We regret to inform you that at this time you do not qualify for an ASME Auxiliary Student Loan. Please feel free to reach out to the ASME Auxiliary’s Student Loan Committee for assistance. If you have any questions please do not hesitate to contact me.

Warm Regards,

Rajan Menon,  
ASME Auxiliary Student Loan Chair  
menonrajank@gmail.com
Student Loan Fund

The American Society of Mechanical Engineers Auxiliary, Inc.

Loan Agreement

DATE: ______________

Borrowed and received from the Student Loan Fund of The American Society of Mechanical Engineers Auxiliary, Inc. five thousand dollars ($5000.00), with interest at the rate of 4 % per annum which I promise to repay within 42 months after graduation, change or termination of student status in thirty-six (36) equal monthly payments.

_______________________________________________________________________________

(Borrower's Name) (Signature)

Permanent Address: ______________________________

Student’s Email Address: __________________________

Student’s Telephone Number: ______________________

School Student is attending: ________________________

_______________________________________________________________________________

Notary’s Name: ________________________________ SEAL

Notary’s Signature: ______________________________

Subscribe and sworn to before me this

__________________________ day of _________________________

Notary Public __________________________ County __________________

____________________________________________________

My commission ID __________________________ expires ______________________
1. The Loan plus accrued interest to be repaid within forty-two (42) months after graduation. The Student Loan Fund Treasurer will provide appropriate payment plans for each borrower.

2. Loans shall not bear interest until the borrower either graduates, changes or terminates his or her student status. At the time of graduation, change or termination of student status of the borrower the loan shall bear interest at the rate of 4% per annum, commencing on the 1st of the sixth month following such change of status. Borrower has the option of prepaying any amount on the principal prior to graduation, change or termination of the status without interest.

3. The borrower has the option of accelerating payments without penalty.

4. Loans outstanding for more than 21 months will be referred to a collection agency. Referral to a collection agency becomes part of the borrower’s permanent credit history.

5. Borrowers are required to notify the Student Loan Fund Account Chairman of any change in status, such as address, graduation date, time of leaving college, and name and address of their present employer. Failure to do so will be treated as default by the borrower.

   a. Expected Graduation Date: ______________

6. In the event of a default in any monthly payment, the borrower agrees that the entire loan may become due and payable or the thirty-six (36) month payment schedule may be accelerated at the sole option of the Student Loan Fund Account Chairman.

7. The borrower’s ASME membership must be paid in full upon approval of the loan and until the full loan is paid off. If the ASME membership becomes in arrears, the borrower agrees that the entire loan may become due and payable.

8. Any dispute arising under this Agreement shall be submitted to the American Arbitration Association in New York. The decision of the Arbitrator shall be binding on the borrower, the co-signers and the Student Loan Fund. Notice of a submission to arbitration shall be made to the Borrower’s last known address as well to the ASME Auxiliary, Inc. Two Park Avenue, New York, NY 10016

Endorsements of two (2) persons who will be financially responsible (co-signers), for the loan. The borrower’s spouse or another student are not acceptable co-signers.

Name: ___________________________ Name: ___________________________
(Please Print) (Please Print)

Home Address: ____________________ Home address: ______________________

Phone: ___________________________ Phone: _____________________________

Email: _____________________________ Email: ____________________________

Signature: _________________________ Signature: _________________________

Date: _____________________________ Date: _____________________________
AUTHORIZATION FOR PAYMENT

ACCOUNTING: Please return checks to ________________________________

Date: ____________

PAY TO STUDENT: Check  Cash  CC

Name
Address
City, State, Zip

<table>
<thead>
<tr>
<th></th>
<th>Amount</th>
<th>Account Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>ASME Auxiliary Student Loan</td>
<td></td>
<td>9-0020118-0327</td>
</tr>
</tbody>
</table>

Requisitioned By: RuthAnn Bigley
Signature: __________________________

Approved by: Rajan Menon, Chair ASLC
Signature: __________________________

Approved by: David Soukup, ASME Managing Director
Signature: __________________________

Received Above Payment Date: ________________________________
(Signature)
DATE

Student’s Name
Address

Dear (Student),

On behalf of the ASME Auxiliary, I want to congratulate you on securing the Student Loan from the Auxiliary. We hope that this will help you to continue your studies and graduate as planned to become a Mechanical Engineer. As you approach your graduation date, a letter from our Student Loan Department will be sent to you outlining your loan payback schedule.

Please remember delinquent loans are referred to a collection agency and will become part of your permanent credit history. Therefore, should you move before your graduation please contact the Student Loan Department at 1-800-843-2763 ext. 2319 or email Loans@asme.org

We wish you all the success in your studies and your future endeavors.

If you have any questions please do not hesitate to contact me.

Warm Regards,

Rajan Menon
Chair, ASME Auxiliary Student Loan Fund
menonrajank@gmail.com
Establishing Scholarships - Form

Guidelines for the Establishment of New ASME Auxiliary Scholarships

Scholarships should not supplant or replace existing awards. The Auxiliary requests that any new scholarship proposal submitted to the Auxiliary should include the following:

1. Proposer cover letter
2. Name of Scholarship
3. Achievement to be recognized (undergraduate, Masters, Doctorate)
4. Description of the Scholarship for the website with reasons for the scholarship to be established
5. Short paragraph about the scholarship that will be provided to the winners.
6. Comparison of scholarship to other similar ASME Auxiliary scholarship (if applicable)
7. Nominee requirements (for example is ASME membership a requirement? How many years?)
8. Limitations (if applicable)
9. Form of scholarship (description of the scholarship, certificate and signatures, honorarium and notification to donor)
10. Sponsorship/Administrative responsibility (Auxiliary)
11. Scholarship committee members selection process, i.e. how are committee members selected?
12. Selection Process (how are nominations solicited)
13. Frequency and number of Scholarships
14. Nomination deadline date to the Scholarship Committee
15. $45K will be available to endow the award if approved
16. The $45K endowment will be held in a temporarily restricted fund for as long as the award exist. The earnings from the endowment will be used to support the expenses associated the award.
   a. The initial and subsequent awarding of funds shall only be made after the principal has earned adequate monies to cover the scholarship amount awarded unless additional funds are made available to the National Auxiliary Board.
   b. If less than $45,000 is donated, the funds shall be invested and upon reaching the amount of $45,000 through investment returns and any additional donation, there shall then be established a new scholarship fund.
17. Should demand for the scholarship wane due to changes in technology or modifications to the internal structure of the Society. The original donor(s) or proposer(s) will be consulted if possible as to how the funds should be dispersed.
18. Donor(s) and proposer(s) are encouraged to anticipate alternate purposes for funds when the primary purpose of the proposed award is no longer feasible. These alternatives shall be stated in the original scholarship document.
19. However, if the alternative purposes are also not feasible and the donor(s) or proposer(s) are not reachable or have passed on, the Auxiliary Treasurer in conjunction with the Executive Committee shall propose alternative purposes for the scholarship.
Honorary Membership shall be conferred only on persons of outstanding accomplishments, whose support of the Auxiliary and contributions toward it objectives, or advancement of the engineering profession are widely recognized, and in the opinion of the Board entitle them to that distinction. A member, to be eligible for this honor, must have been on the Auxiliary roster five or more years. Personal application may not be made for such award.

The granting of Honorary Membership shall be initiated only by a Proposer acting alone or as representative for a voluntary group each of whom shall have personal knowledge of the candidate’s qualifications and his/her contributions toward the objectives of the Auxiliary. The Proposer shall prepare a Petition, using a standard form prescribed by the Board and furnishing complete information as specified therein. It shall be signed by the Proposer and by all participants whom may be acting. A total of 8 signatures shall be required.

A citation shall be furnished stating in 10 – 50 words the outstanding accomplishments that are deemed sufficient to warrant granting this honor.

We, the undersigned, petition the National honors and Awards Committee of the ASME Auxiliary, Inc. to present the name of ________________________ for Honorary Membership in recognition of valued contributions and outstanding services in advancing the cause of The Auxiliary.

1.____________________________  5.____________________________

2.____________________________  6.____________________________

3.____________________________  7.____________________________

4.____________________________  8.____________________________
## TRAVEL EXPENSE REPORT

### Name: TRAVEL EXPENSE REPORT

### Date:

### Trip: ASME

### Employee/Vendor #: MON TUES WED THUR FRI SAT SUN

<table>
<thead>
<tr>
<th>DATE</th>
<th>LOCATION</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Air/Rail Fare - Coach (1)(3) |       |       |
| Auto Expense 56¢/mile (1)(4) |       |       |
| Parking & Tolls (1) |       |       |
| Taxis & Bus fare |       |       |
| Your Meals: Brkfst (including tip) |       |       |
| Lunch (including tip) |       |       |
| Dinner (including tip) |       |       |
| Lodging (1) |       |       |
| Telephone & Telegraph |       |       |
| Guests: Explain on back (1)(2) |       |       |
| Guests: Explain on back (1)(2) |       |       |
| Other: (Explain below) |       |       |
| 1) MISCE |       |       |
| 2) GRATUITIES |       |       |
| 3) |       |       |

### DAILY TOTALS

<table>
<thead>
<tr>
<th>Charge Account Number</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>(a) Less Charges Paid by ASME</td>
<td></td>
</tr>
<tr>
<td>Total Cash PAID by Employee</td>
<td></td>
</tr>
<tr>
<td>Less: Travel Advance</td>
<td></td>
</tr>
<tr>
<td>Balance Due to Employee (ASME)</td>
<td></td>
</tr>
</tbody>
</table>

(Advance) * |       |

| Total Due to Emp. (ASME) |       |

<table>
<thead>
<tr>
<th>Accounting USE ONLY</th>
<th>Signature:</th>
<th>Date:</th>
</tr>
</thead>
</table>

Audited by:  
Approval: Date:

* Amount must be input as a POSITIVE number

- EXPENSE REPORTS ARE REQUIRED TO BE SENT TO THE ACCOUNTING DEPARTMENT AT THE END OF EACH WEEK
- TRAVEL ADVANCES ARE TO BE SETTLED WITHIN ONE WEEK AFTER RETURNING FROM A TRIP

**NOTES:** ITEMS CODED (1), (2), (3), (4) See footnotes on reverse side

**MEALS:** Please indicate only your meals

Do not include personal or non-business expenses

A receipt must be attached for each separate expenditure of $20.00 or more

Identify and explain unusual business expenses incurred.
ASME Auxiliary National Board
Expense Report Form

Please list below all authorized expenses. Receipts for postage, supplies, telephone, duplication, etc. should be attached. Original Airline, bus or train tickets shall be attached, or round-trip mileage listed.

Date: ______________

Expenses:

Signature: _______________________________________________

Name (typed or printed)  ___________________________________

Address:  ___________________________________

_________________________________

_________________________________

Please mail this form to the Auxiliary President for approval ASAP. All expenses are submitted to ASME within two weeks of a meeting, as required by the Board of Governors.

DATE  ______________ President, ASME Auxiliary

Staff Approval  Account Number  Amount

_________________  ___________________  $___________
THE AMERICAN SOCIETY OF MECHANICAL ENGINEERS
AUXILIARY, INC.
Presents the

CHARLES B. SCHARP
SCHOLARSHIP
To

Michael Messenger
University of New Haven
2012

Chair
Undergraduate Scholarship Committee

President ASME Auxiliary
CERTIFICATE OF APPRECIATION

presented to

Madiha Kotb

in testimony for your valued service as

Guest Speaker

at the

Auxiliary Luncheon

ASME 2014 International Mechanical Engineering Congress & Exposition
Montreal, Canada November 14-20, 2014

President ASME Auxiliary
THE AMERICAN SOCIETY OF MECHANICAL ENGINEERS
AUXILIARY, INC.

CONFERS

HONORARY MEMBERSHIP

UPON

Madiha Kotb

In Recognition Of Her Valued Contributions
And Outstanding Services In Advancing
The Cause Of The Auxiliary
2014

President ASME Auxiliary