



Mortar Board

Scholars...Chosen for Leadership...United to Serve

ADVISOR NEWS

Proper orientation leads to chapter success

According to the Chapter Minimum Standards found in the national Bylaws, each chapter must hold an orientation prior to initiation to ensure that candidates are familiar with Mortar Board and the expectations of membership prior to joining.

The outgoing chapter president is responsible for orientation. Some chapters may have an assigned orientation officer or committee to lead the orientation. As the advisor, please be sure to remind your chapter about the importance of orientation.

Although the specific details of orientation vary greatly from one campus to the next, it is important to properly introduce all new members to Mortar Board. The Official Membership Booklet, a great tool to use during orientation, contains important information on the national requirements, history, traditions and benefits of membership. Chapters use the orientation session as a time to introduce their own traditions, outline chapter plans and explain the participation policy. It is also a good idea to hold an icebreaker so all members can get to know each other. For ideas, refer your chapter president to any edition of INK, as an icebreaker is featured monthly.

A sample outline, along with helpful tips, is available in the New Member Orientation Guide.

Wrap up the Mortar Board year successfully

As the academic year comes to a close, chapter members are increasingly busy. An effective transition of incoming and outgoing members can ensure that all necessary reports and tasks are properly executed.

Responsibilities of the outgoing class

Transition and train new officers - Thoroughly training the new class helps to strongly complete this academic year and start the upcoming year effectively. Transition and training includes passing down officer binders or records, hosting one-on-one officer meetings for incoming and outgoing members, and reminding the new chapter president to register for the annual conference.

Complete reports - It is the responsibility of the outgoing chapter to complete all chapter reports before graduation. Here is a list of due dates and the officer responsible for completing them:

| Report form | Responsible officer | Due date |
|------------------------------------|--|----------|
| Chapter Annual Report | President | May 15 |
| Chapter Financial Report | Treasurer | May 15 |
| Advisor Annual Report | Advisor (only one report per chapter is necessary) | May 15 |
| Final OMR and fees | Membership Chairperson, Treasurer | May 15 |
| Officer Address Information Form | President (outgoing or incoming) | May 15 |
| Annual chapter award nominations* | President, Advisor or other representative | May 15 |
| Chapter project grant application* | President, Advisor or other representative | May 15 |
| National Conference registration | Incoming chapter president or other officer in his/her absence | May 15 |

*Optional, strongly encouraged

Deadlines and Reminders

May 15

- Chapter Annual Report due
- Chapter Finance Report due
- Final Official Membership Report (OMR) due
- Advisor Annual Report due
- Officer Address Information Form due
- Chapter Project Grant applications due
- Conference registration due
- Annual chapter award nominations due
- All fees due

Mortar Board Lingo

What is the conference fee?

Each chapter is required to annually pay a conference fee to the Mortar Board National Office. The current \$200 conference fee helps defray a portion of the annual Mortar Board National Conference expenses. Additionally, it provides for chapter operations information shared at the annual conference; supports a vehicle for chapters to come together annually to learn and share about scholarship, leadership and service; allows for one official chapter delegate from each chapter to travel to the annual national conference, to participate in governance of the organization, enjoy meals, hotel stay and all materials at no additional cost. Despite the fact that chapters pay the nominal fee of \$200, the benefits are valued at more than \$500.

The national conference fee of \$200 may be paid by one check or one credit card and submitted to the National Office, following the collection of required membership fees – normally collected between orientation and initiation.

If your chapter needs fundraising assistance to cover the payment of this fee, please review the helpful list of fundraising ideas online.

Responsibilities of the incoming class

- **Elect new officers** - Before leaving campus for the summer, all new officers should be elected and reported to the National Office.
- **Register for the conference** - Each chapter is required to send one official delegate to the annual Mortar Board National Conference. This delegate is typically the new chapter president, but in his or her absence, can be another officer or chapter member. The 2009 conference will be held July 24 - 26 in Chicago and registration is available online.
- **Get acquainted** - The new chapter should set up at least one meeting before the end of the academic year to get to know each other and start planning for next year. Each edition of the Mortar Board INK features an icebreaker idea that you can use to help engage the members.
- **Plan to keep in touch** - Members may be scattered during the summer, but encourage them to stay in touch via e-mail.

Chapter project grants

The Mortar Board National Foundation provides financial assistance to chapters to help develop and execute new, creative chapter projects. The next deadline to submit a chapter project grant application is May 15.

Projects which reflect the aims and purposes of Mortar Board, engage all of the chapter's membership and have the potential for becoming an annual chapter activity are given priority.

Being a helpful advisor

Officers may come to you for help in completing their year-end reports and award nominations. While the National Office encourages you to support your chapter, it is not your responsibility to finish the chapter's work for them.

Feel free to lend a hand where necessary. If the transition process is correctly executed, the outgoing and incoming officers should coordinate and divide the work that needs to be done, instead of letting it fall to you.

Advisor Annual Report deadline is May 15

The required Advisor Annual Report, due May 15, provides the National Office with important information about your chapter's operations and solicits feedback to better serve you and your chapter. For example:

- Do you feel supported by the National Office?
- Have you been in contact with your section coordinator?
- What types of materials would be useful to you as an advisor?
- Do you have suggestions for how to improve Advisor News to best serve you?

Through the report, you may also request a letter acknowledging your role as chapter advisor be sent by the National Office to your supervisor at work.

Please complete this required report by May 15 and share your recommendations for improving advisor relations.

Mortar Board OMR transition update

During the past academic year, the Mortar Board National Office has shared the desire to update the reporting and membership management system, specifically the Official Membership Report (OMR) and payment process. In order to best assist and train officers and advisors on the procedure, the transition will be postponed until the upcoming academic year. The temporary Official Membership Report (OMR) should be used for the duration of the 2008-2009 academic year.

Plan to attend the 2009 Mortar Board National Conference

Advisors are encouraged to attend the Mortar Board National Conference, which will be held July 24 - 26, 2009. Here are just a few of the things advisors can expect:

- Network with other chapters in your geographic region and across the country
- Meet with other advisors to share ideas and strategies for supporting chapters
- Attend sessions with varying topics specific to advisors, such as how to effectively communicate with chapters, how to support chapter leadership, how to make your Mortar Board chapter the best it can be and more
- Learn all about Mortar Board's national operations by participating in numerous general sessions for advisors and students
- Advisors are able to attend for the nominal registration fee of \$225, which covers all accommodations, meals and program materials. Transportation, however, is not funded or provided by Mortar Board.

