

OFFICER & ADVISOR

2011-2012 HANDBOOK

Mortar Board
National College Senior Honor Society
1200 Chambers Road, Suite 201
Columbus, Ohio 43212
Phone: 800-989-6266 | Fax: 614-488-4095

ACTION!

Congratulations on being elected as an officer in your chapter of Mortar Board! Leading a Mortar Board chapter is an exciting and challenging charge, and an experience that you will never forget.

As you prepare for your leadership role, we offer you this food for thought: *Having a title doesn't make you a leader any more than standing in a garage makes you a car.*

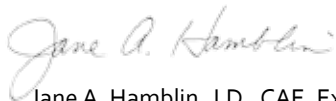
This statement defines how Mortar Boards are different: instead of coasting along and enjoying the perks that come with being at the top, we make leadership count through action.

As you will read later in this handbook, **action** is what sets Mortar Board apart from other honoraries and honor societies. Mortar Board chapters are expected to be an integral and vibrant part of campus life.

This guide is meant to help you know how to do just that. And, you won't be alone—there are many resources available to you and a team of Mortar Board staff and volunteers across the nation just waiting to help you!

We hope that this experience will help you hone your already impressive leadership skills, and that you will work hard to provide that same opportunity to all of your members.

Thank you in advance for the dedication, excitement and hard work you will bring to your role. We can't wait to work with you!



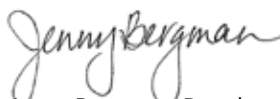
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Mortar Board National College Senior Honor Society

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MORTAR BOARD FAST FACTS

Founding date: February 15, 1918

Founding chapters: Cornell University, The University of Michigan, The Ohio State University and Swarthmore College

Purpose: Mortar Board, Inc., as an honor society, is an association of individuals selected for distinguished ability and achievement in scholarship, leadership and service, which recognizing the advantages of a national union of senior honor societies, has formed a national honor society, whose purpose shall be to facilitate cooperation among those societies, to contribute to the self-awareness of its members, to promote equal opportunities among all peoples, to emphasize the advancement of the status of women, to support the ideals of the university, to advance a spirit of scholarship, to recognize and encourage leadership, to provide service, and to establish the opportunity for a meaningful exchange of ideas as individuals and as a group.

Motto: Pi Sigma Alpha (ΠΣΑ), letters that represent the Greek words Πολυμάθεια, Σέρβις and Αρχηγία, for which the English translations are Mortar Board's three key ideals: scholarship, service and leadership

Symbol: A mortarboard, an ancient symbol of honor and distinction, represents the organization. Many early scholars also adopted the clerical or monastic robes as a symbol, illustrating their devotion to the profession of learning.

Colors: Gold (representing achievement) and silver (symbolizing opportunity)

Official publication: The *Mortar Board Forum* is a semi-annual publication featuring stories about alumni, articles about chapter activities and accomplishments, current issues and trends, messages from Mortar Board national leaders and more. It is distributed in print and electronically to collegiate and alumni members across the nation. Members continue to receive the *Mortar Board Forum* as they join the ranks of sustaining alumni members.

Pin: Shaped like a black mortarboard with the Greek letters representing the motto engraved in gold

Membership: Nearly a quarter of a million members have been initiated at 229 chartered collegiate chapters.

National project: "Reading is Leading," which strives to promote literacy across the world for people of all ages, is the permanent national project.

229

Chartered Mortar Board chapters

5,000+

New members initiated each year

250,000

Mortar Board alumni

MORTAR BOARD CONTACTS

National Office

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800-989-6266 ext. 101

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Development and Operations Specialist

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Not sure who to contact? Use these email addresses.

General questions - mortarboard@mortarboard.org

Website, magazine or logo questions - mbforum@mortarboard.org

National Conference questions - conference@mortarboard.org

Report forms - reports@mortarboard.org

National Council, 2011-2013

Effective July 31. The six "to be determined" positions will be elected during the 2011 Mortar Board National Conference.

President

Susan Caples - president@mortarboard.org

President-Elect

TBD - president-elect@mortarboard.org

Vice President

TBD - vicepresident@mortarboard.org

Secretary-Treasurer

TBD - secretary-treasurer@mortarboard.org

Alumni representatives

TBD - alumni-rep1@mortarboard.org

TBD - alumni-rep2@mortarboard.org

Student representatives

TBD - studentrep1@mortarboard.org

Vicente Gonzalez - studentrep2@mortarboard.org

Ex officio

Sally Steadman - foundationchair@mortarboard.org

Jane Hamblin - jhamblin@mortarboard.org

Section coordinators

Find your section on page 29

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Katie Verschelden (23 and 24) - section23-24@mortarboard.org

Mohammed Hill (25) - section25@mortarboard.org

GETTING STARTED

One of the first responsibilities of a new class of Mortar Board members is to elect officers. Election of officers may take place before or after initiation. Some chapters install their new officers publicly at initiation.

It is critical to elect officers who are dedicated to the ideals of Mortar Board and who will lead your chapter through a successful year. Inactive officers can negatively affect your chapter's visibility and reputation on campus as well as your ability to have an effective, action-packed year in Mortar Board.

Your chapter should set expectations for officer performance before officer elections occur.

Chapters must elect one person for each chapter office required by the national *Bylaws* (Article VI, Section 1.26). The primary responsibilities for each of these officers are described below. Your chapter may add or adjust these duties as you see fit.

Around the time of officer election, the chapter should examine its advisory situation. You may wish to add an advisor to assist with a special project or goals that you have set. Your current advisory team should be able to help with this assessment. Strong advisors directly relate to a chapter's success.

ELECTING CHAPTER OFFICERS

Qualities to seek in a chapter officer

- Enthusiasm and interest in Mortar Board
- Timeliness and organization
- Previous experience in a leadership role and leadership effectiveness
- Interpersonal skills

Required positions

- **President** - The chapter president is a supportive leader who is able to establish and maintain a regular meeting schedule, work with the chapter to set reasonable goals early in the academic year, facilitate chapter goal-setting, communicate with national and regional Mortar Board contacts and represent the chapter at the national conference in July. The president is responsible for making sure that national reports are turned in on time.
- **Vice president** - The vice president should be available to perform all the president's duties in her or his absence. The vice president may perform various duties, from overseeing committees to managing the membership selection or recruitment process.
- **Secretary** - The secretary is charged with recording all minutes of each meeting and distributing copies to all chapter members and maintaining good internal communication with all chapter members. Additionally, the secretary maintains an accurate roll of member attendance and standing within the chapter.
- **Treasurer** - The treasurer maintains a working budget and pays all chapter bills, while keeping good financial records. This officer is required to submit all financial reports and pay all national fees by the appropriate deadlines.

- **Membership chair** - The membership chair will plan, manage and execute the membership selection process. This officer should become familiar with the required procedures for executing an appropriate selection process. Certain membership procedures for which the chair is responsible include publicizing Mortar Board's application or nomination process, selection, tapping, orientation, initiation and reporting new member information to the National Office.

- **Director of communications** - This officer manages all external, and sometimes internal, chapter communications efforts. He or she is responsible for submitting contributions to the *Mortar Board Forum* and national website, establishing good relationships with campus and local media, publicizing chapter activities and events by submitting newsworthy story ideas and press releases, and maintaining the chapter website.

- **Historian** - The historian is a liaison to the national Historical Publication Committee. The historian records important chapter information by photographing all events, compiling and updating chapter history and preparing a scrapbook of the chapter's year.

- **Alumni chair** - This chair is a liaison with area and chapter alumni and maintains strong relationships with these members. He or she establishes and updates contact information for area alumni, submitting address changes or updated contact information to the National Office periodically. He or she also submits nominations for outstanding alumni for national Mortar Board awards.

Additional officers

Many chapters elect additional officers as necessary to serve other purposes. All chapter officers, whether required offices or not, must be reported to the National Office on the Officer Address Information Form.

- **Webmaster/Technology chair** - The webmaster updates the chapter website and oversees or assists with any technological efforts, such as an online membership application. She or he may also assist the director of communications or secretary by emailing minutes or chapter newsletters.

- **Programming/events/activities chair** - This may be one officer or several. In many instances, this chairperson will be responsible for a major campus event or activity, such as a Reading is Leading literacy event or large-scale campus initiative like a leadership conference. A committee may be formed to support this office.

- **Service/philanthropy chair** - This officer often plans both one-time and recurring service events. There may be a committee to support this office.

- **Social chair** - This officer improves member relations and builds a team by planning social events for members. This officer may also plan an icebreaker for each meeting and order chapter T-shirts.

- **Fundraising chair** - The fundraising chair may also provide support to the chapter treasurer. This officer brainstorms and organizes all fundraisers, and may also help to develop and oversee a fundraising participation policy. A committee may be formed to support this office.

CHAPTER AND OFFICER TRANSITION

Officer training and transition directly affects the achievement of a Mortar Board chapter. In most cases, there is a 100 percent turnover of Mortar Board members, and a proper transition for the entire chapter is absolutely necessary to continue your chapter's legacy.

Maintaining proper records throughout the year

Every chapter officer should maintain immaculate records throughout the year to ensure the next officer has all of the information needed. An officer should store relevant emails, minutes, notes, letters, posters, promotional materials and contact information. The best way to share this information is one or all of the following:

- Binder or folder with printed copies of all necessary information
- A data CD with original files to be updated for the next year and records to help with planning
- A USB flash drive with all relevant records and original files to be updated for the coming academic year

Chapter transition

In a session with new and outgoing members meeting together, divide into small groups. Divide these groups by membership so that all new members are in one group and all outgoing members are in the other group. Have the groups discuss the topics listed below. Following a brief discussion (approximately 20 minutes), ask each subgroup to report to the full group. Save time for questions and answers. It's valuable for advisors to be a part of this transition meeting.

Outgoing members

- If you had your year of Mortar Board to do over, what would you do differently?
- What advice would you give to new members?
- How can new members best combine Mortar Board activities with their other leadership and service commitments?
- Did your chapter encounter any challenges during the year? If so, what were they and how did you overcome them? How would you avoid them in the future?

New members

- What do you want Mortar Board to mean to you a year from now?
- What goals would you like to accomplish as a group?
- What problems do you anticipate as a chapter?
- How might you work to solve these?

Other topics for discussion

- What commitment of time, interest and energy must members make? What is the commitment of the chapter as a whole?
- Mortar Board is unique as an association of leaders. What dynamics result?

BUILD YOUR TEAM

Each chapter is diverse, representing a variety of majors, interests, cultures and ages. This diversity is of value to Mortar Board yet can also be a leadership challenge.

Creative team-building strategies can help you take a group of individuals and form them into a loyal, supportive and cohesive community. These team-building efforts will need to be focused and continuous, built into each meeting or project, and included in all correspondence.

Get to know everyone. Every member should know other members' names, some fact(s) about them, and perhaps something they have in common.

How to: Open each chapter meeting with a brief icebreaker and hold social events regularly. At the beginning of the year, a retreat can help build a bond. In each set of minutes emailed to members, include a brief bio on a "spotlight" member.

Your chapter should reflect a trusting, open environment. The chapter will work better together if each member feels welcomed, involved and appreciated. There are very different people in a group with various skills that can help your chapter. Learn about these special skills and welcome them openly. Take different beliefs into consideration when planning for the year. For example, some religions or denominations do not find it acceptable to attend meetings on certain days.

How to: During the year, assign all members a five-minute presentation to tell about themselves, a hobby, or their career choice. As the leader, be sensitive and listen for concerns that may result from differences. A great way to make all members feel involved is simply keeping them informed, whether it is the regular emailing of minutes, a newsletter, or simply an update email from the chapter president.

Develop ownership in the group and its purpose. Make sure the group has had an orientation about Mortar Board to learn about the Society's national and local roots. Bring in speakers that will affirm the members' honor and responsibilities to the organization. Discuss the mission statement of Mortar Board. What does that mean to this group? Goal-setting and program development must be produced by everyone. People help support what they help create.

How to: Hold a chapter orientation. If a member wasn't available to attend, hold a make-up orientation or provide her or him with written information. Establish a participation policy that doesn't make members feel threatened, but helped. Thank members by name at meetings for participating in certain events or consider sending thank-you cards so members know they are valued. Honor a "member of the month" with a small prize for someone the executive board believed the group.

Use your resources. Your section coordinator is your "guide on the side." She or he can be a sounding board, national advisor, speaker at a chapter meeting and mentor. The staff of the National Office are also always available to help you.

Use the website. You're tech-savvy and busy, and we know it. That is why we try to make nearly every Mortar Board resource available online so you can access anything you may need, 24 hours a day.

Be informed. Find out what is happening in other chapters and get ideas for your own chapter—join Mortar Board's social media communities on Facebook, Twitter and LinkedIn.

- How does Mortar Board promote an opportunity for personal friendships and interpersonal relationships among the members?
- What talents or areas of interest are represented in the chapter? How do we best utilize them?
- What goals should we set as a chapter? How will we implement them?
- Is Mortar Board a viable and visible organization on campus? If not, discuss how to change this!
- What do you hope to realize from your membership in Mortar Board? How do you visualize Mortar Board and your part in it?

Goal-setting

The new chapter should begin to set goals. Understand the minimum standards for a Mortar Board chapter and national awards. Chapter transition is best accomplished by having activities involving both the new and existing members of the chapter.

Officer transition

To ensure that each chapter officer is prepared for the upcoming year, set a meeting that all new and old officers can attend. If any officer is unable to attend, she or he must set up a separate transition meeting outside of the general transition meeting. A suggested meeting agenda for a combined meeting of old and new officers and advisors includes:

- A discussion of the greatest challenges of the past year — positive and negative
- Suggestions from outgoing officers for improvement
- Individual meetings of officers and advisors from their preceding chapter
- An exchange of contact information, such as phone numbers and email addresses
- The outgoing officers should present new officers with their records for the year, carefully stored in a binder/folder, data CD or flash drive
- Time for new officers and advisors to ask questions
- A verification that all membership fees have been sent to the National Office
- A chapter delegate should be selected to attend the 2012 Mortar Board National Conference, to be held July 20-22, 2012, in Chicago. Typically, the chapter president serves as the official delegate and additional chapter members may also attend. If the new chapter president is unable to attend the conference, an alternate must be chosen and reported to the National Office. The official conference registration form will be available online beginning March 15. All delegates must be registered on or before May 15.

CHAPTER MINIMUM STANDARDS

Chapter Minimum Standards were established as part of the *Bylaws* by the delegates at the 1982 National Conference (*Bylaws*, Article VI, Section 1.22). Chapters must:

- A) Select new members on the basis of distinguished ability

and achievement in scholarship, leadership and service.

- B) Submit the national Chapter Action Plan (CAP) according to published deadlines.
- C) Prior to tapping, send the names and qualifications of candidates to the National Office on the Official Membership Report for verification.
- D) Tap new members well before the end of the school year.
- E) Hold an orientation program prior to initiation for those tapped.
- F) Hold an initiation ceremony for new members.
- G) Collect the national fees associated with membership before initiation. Submit all membership and chapter fees together with the Official Membership Report to the National Office.
- H) Elect new chapter officers before the end of the school year. The outgoing chapter officers in cooperation with the advisor(s) must orient the new officers before the end of the school year. All officers are to receive, maintain and pass on a manual of pertinent information for that office.
- I) Hold regular and frequent meetings (a minimum of once a month during the school year).
- J) Establish a participation policy.
- K) Have at least one advisor. It is recommended that a chapter have more than one and that advisors serve for a minimum of two years to aid in continuity of chapter operations.
- L) Submit an annual report, including a financial report (and appropriate IRS forms, if necessary) to the National Office by the end of the school year. If a chapter's annual income exceeds the minimum threshold set by the Internal Revenue Service, the chapter must comply with the reporting requirements and copy the National Office on all correspondence.
- M) Send a delegate to the Mortar Board National Conference.
- N) Develop and implement programs related to the ideals of scholarship, leadership and service that encourage collaboration between the chapter and other student organizations, alumni, other Mortar Board chapters and the community at-large.
- O) Develop and implement at least one program related to the national project, Reading is Leading.

Excellent chapters will go beyond the minimum. Chapter reports, reporting deadlines for membership, chapter operations and maintenance of tax exempt status are established by the National Council.

CHAPTER AWARD OPPORTUNITIES

Chapters should be honored for the excellence they exhibit throughout the year. Therefore, they are encouraged to nominate themselves for numerous chapter awards. Nominations for all are due in the spring of each year. Specific deadlines are listed at www.mortarboard.org/forms.

- **Silver Torch Award** - This honor is awarded to chapters meeting the Chapter Minimum Standards
- **Golden Torch Award** - This mark of distinction is given to chapters meeting all the requirements for the Silver Torch Award and then go beyond the minimum, exemplifying scholarship, leadership and service. A chapter must be nominated by its section coordinator to receive this award.
- **Ruth Weimer Mount Chapter Excellence Award** - This award is the highest possible honor given in chapter achievement. The winning chapter is chosen based on chapter operations, participation, selection, advising, visibility and communications. A chapter that receives this award is not eligible again until five years have passed.

Qualifications include:

- Be represented by a delegate at every annual national conference
 - Practice timely submission of all plans and reports to the National Office
 - Complete all college/university and Mortar Board financial obligations
 - Have a current chapter website
 - Submit an application for a Project Excellence Award
 - Complete the national project, involving a minimum of 75 percent chapter member participation
 - Sponsor an alumni event, alumni newsletter or cosponsor a service project with another Mortar Board chapter
 - Practice an excellent selection process (following procedures, diversity in membership, consideration of a large pool of candidates relative to campus size, selection of a relatively "full" chapter size)
 - Have an active advisor
 - Be in good financial standing
 - Have campus visibility
 - Have established traditions
 - Have an effective communications system within the chapter
- **Most Improved Chapter Award** - The purpose of the award is to encourage chapter development and to recognize a chapter that has achieved success during the year while re-establishing and re-invigorating programming and membership. For consideration to receive this award, a chapter may self-nominate or may be nominated by its section coordinator.
 - **Project Excellence Awards** - Section coordinators may nominate outstanding projects, or chapters may self-nominate events they have executed throughout the academic year to receive this award. To be considered, chapters must have accounts cleared and meet the minimum chapter standards.
 - **Excellence in Advising Awards** - Advisors are honored annually at the national conference for exemplifying the ideals of Mortar Board by providing excellent service, guidance and support to a collegiate chapter.

PROGRAMMING FOR SUCCESS

Whether it's fundraising, community service, leadership or academic programming, Mortar Board chapters are known for planning and executing top campus events all year long.

READING IS LEADING

The national project started in 1985 as a way to tie all chapters together for service on one common issue. Selected as the national project for 1999-2001, Reading is Leading was made the permanent national project in 2002. The goal of Reading is Leading is simply to get people back into books by advocating reading. It gives Mortar Board members the chance to engage in leadership while performing an important service to the community within the framework of promoting knowledge. Reading is Leading serves as an umbrella of sorts over the tenets of community and campus involvement and academic integrity.

For example, Mortar Board members can help cultivate strong ethics by reading stories, newspaper articles and current events issues to students at various levels of education; assist non-native English speakers to learn English as a second language (ESL); and address academic integrity at an early age in elementary and secondary schools.

Reading is Leading chapter projects vary. Some examples are read-a-thons, book drives, trick-or-treating for books, adopting a school and reading at various venues such as a children's hospital or retirement community.

One way chapters are encouraged to get involved in the national project is by working with Mortar Board's national literacy partner, First Book (www.firstbook.org). Better World Books (www.betterworldbooks.com) is also a good connection that some chapters use.

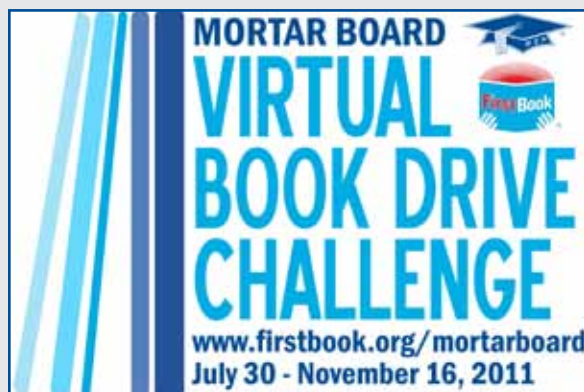
More information on the national Reading is Leading initiative can be found at www.mortarboard.org/about/project.html or in the Reading is Leading Resource Guide.

Virtual Book Drive

The Mortar Board Virtual Book Drive is a fundraising challenge in which chapters compete to raise funds to bring new books to local programs serving children from low-income families. These funds will be available for use through the First Book Marketplace, where programs can choose from hundreds of high-quality titles at deeply discounted prices. Every \$2 raised is a brand new book for a child who needs it the most.

The Virtual Book Drive will be held July 30 - November 16, 2011.

As part of the Reading is Leading National Project, Mortar Board's goal for this challenge is **\$30,000**. To learn more, please visit www.firstbook.org/mortarboard.



The key to success? Plan ahead! Make sure tasks are appropriately assigned to members of your chapter so that every event goes smoothly. Here are some hints for some of the most popular types of events held by Mortar Board chapters. Be sure to wrap your advisor into planning and execution.

Fundraising

- Start early by determining a budget so that you will know how much you need to fundraise. Try to leave a substantial amount of money at the end of the academic year for the next chapter.
- Consider appointing a fundraising chair to help spearhead projects your chapter plans on completing.
- Involve your entire membership in choosing fundraisers that are best for your chapter (some events require more people power than others, while other events work quite well with smaller groups).
- Visit the chapter resources section of our website or contact the National Office for specific fundraising ideas.

Leadership and academic programming

- Leadership and scholarship are two of the ideals of Mortar Board, so consider doing something in your campus community to honor other leaders and scholars. This will distinguish Mortar Board from other student organizations. Honoring freshmen and sophomores who excel in scholarship and leadership can be a great recruitment tool.
- Some Mortar Board chapters have become tremendous resources for leadership advice on their campuses; if you are interested in planning a leadership conference, seminar or training program for your chapter or campus, contact your section coordinator or the National Office for ideas.
- Include alumni in these types of events, especially recognition banquets (alumni are often likely to contribute their time and finances to honoring Mortar Board members and others who excel in scholarship, leadership and service).

Service

- Mortar Board members are selected on the basis of their leadership and dedication to service, but they are also expected to give back to their campus—remember to build varied service opportunities into your schedule as you plan for the year so that everyone gets a chance to participate.
- Your chapter should consider planning at least one Reading is Leading project each year.
- If you have a small chapter, consider partnering with another organization on campus for large-scale projects. You can find many service ideas in the chapter resources section of the national website, or by contacting your section coordinator or the National Office.
- Remember, Mortar Board is an organization whose members serve their alma maters by finding a specific need or niche on campus—not an organization with the sole purpose of conducting community service.

CHAPTER EMAIL

(<http://chapter.mortarboard.org>)

Each Mortar Board chapter is given a mortarboard.org email address and Google account. To see a list of these email addresses, please visit www.mortarboard.org/chapter/list.html.



Your Google account

Mortar Board works with Google in order to provide chapters with a reliable, free email service as well as several other Google applications, including Google Calendar, Docs and Sites. With 7 GB of storage, your Mortar Board Gmail allows your chapter to store important data, newsletters and minutes to pass down from one year to the next.

Google services available through Mortar Board

- **Google Sites** – Use this free application to quickly create and publish a site for your Mortar Board chapter.
- **Google Docs** – Help with chapter transition from year to year by uploading important documents, minutes and reports to pass onto subsequent chapter officers.
- **Google Calendar** – Subscribe to Mortar Board’s national calendar to see important deadlines and reminders, and store your chapter’s upcoming meetings, campuswide events and activities in one safe and easy-to-access place.
- **Google Talk** – Call or send instant messages to your contacts, Mortar Board’s leaders, friends from the Mortar Board National Conference and others by downloading Google Talk or using the Google Talk Gadget.

Finding your username and password

- Each chapter’s **username** is the first portion of the chapter@mortarboard.org email address (“chapter”) listed at www.mortarboard.org/chapter/list.html.
- Your email **password** may have been passed down to you from a previous chapter officer or advisor. If you do not know your chapter password, please contact the National Office at 800-989-6266 or mortarboard@mortarboard.org.

Checking your email

All chapters are required to consistently log in to their Google account and regularly check email.

1. Log in at <http://chapter.mortarboard.org>
2. Insert your username and password for your chapter email address
3. Use this email address to collect membership applications, send out chapter minutes, contact potential members and more.

Message forwarding

Interested in forwarding your Mortar Board mail to another address? Simply navigate to “Settings” and click on the “Forwarding and POP/IMAP” tab to redirect messages to a different email address.

Assistance

Please contact the Mortar Board National Office at 800-989-6266 or mbforum@mortarboard.org with questions about chapter email addresses.

MORTAR BOARD WEEK

February 12 - 18, 2012

Each year, Mortar Board chapters across the country celebrate Mortar Board Week in commemoration of the founding of Mortar Board on February 15, 1918. In 2012, Mortar Board Week will be held February 12 to 18.

Many chapters honor Mortar Board Week by holding a special event, such as a book drive, academic forum or banquet. Other chapters incorporate Mortar Board Week into their membership recruitment and selection process by using the time to reach out to potential new members or honor underclassmen for their academic work. It is a great time to schedule an appointment with your university president and chief student affairs officer.

All chapter members are encouraged to wear their Mortar Board pins, Mortar Board apparel, and promote Mortar Board in a positive way throughout the week. If your chapter does not yet have an event planned and is interested in getting more ideas, please contact your section coordinator or the National Office.

Planning help

Mortar Board Week is the perfect time to hold a chapter event and spread the word about Mortar Board on your campus. Events or activities exemplifying all or any of Mortar Board's three ideals (scholarship, leadership and service) should be planned.

Recruitment

If your chapter's membership application or nomination deadline falls after the end of Mortar Board Week, then you can use Mortar Board Week to promote Mortar Board membership. Here are a few ideas for incorporating chapter recruitment into your Mortar Board Week plans:

- Post fliers or posters (if permitted) in the student union, residence halls, dining halls, classrooms, sorority and fraternity houses and other living units, athletic or fitness facilities, and club meeting rooms.
- Create a detailed Mortar Board display in the student union or popular campus location. Have chapter members staff a table at the student union and provide informational brochures and applications to potential applicants. Providing giveaways (such as candy or coupons) is an effective tool to draw visitors to the table. Encourage members to show their pride by wearing their Mortar Board pins throughout the week.
- "Chalk" sidewalks on your campus (if permitted) with information about Mortar Board Week.
- Contact the National Office to help create a business card-size design with at-a-glance recruitment information such as

the link or address where Mortar Board applications can be found. These cards can be printed quickly at a low cost and are easily distributed to prospective members.

- Hold a dessert reception, mixer, karaoke night or other social event where potential members can attend to learn about the society, get to know current members and enjoy a fun time.
- Use a campuswide event to inform faculty and staff about Mortar Board selection. Often faculty and staff can be your biggest promoters!

Service

- Hold your large-scale service events during Mortar Board Week in order to maximize the visibility your chapter receives.
- Think about starting projects that will solidify your chapter's niche as the leading campus organization. Mortar Board Week is a great time to tie in these projects.
- Considering honoring your institution with recognition receptions for groups such as faculty, staff and other student organizations.

Publicity/visibility help

During Mortar Board Week, each chapter should try to spread awareness of the Society. This can include making underclass students aware of the Society and enhancing a relationship with faculty and staff to instill familiarity with Mortar Board. Some audiences a chapter should try to reach for maximum visibility:

- The campus and surrounding community including students, faculty, staff and local community members
- Campus media such as the student newspaper, university communications office, university news office, student radio, campus magazines, etc.
- Local media outlets such as local newspapers, television and radio stations. You can direct campus and local media to the Mortar Board Week fact sheet and chapter information pages available online. Media outlets can obtain a great amount of useful information to understand Mortar Board Week and your local chapter.

Mortar Board has provided a helpful compressed folder of materials that can help. The Visibility Resources Folder, available at www.mortarboard.org/MBWeek, contains:

- **Mortar Board Week logo** - The official event logo is available in both color and black and white on the national website.
- **Posters** - Two designs are available in both color and black and white for 8 1/2" by 11" paper and for 11" by 17" paper. These are great for posting in classrooms, dining halls and residence halls.
- **E-postcards** - Ready-made e-postcards ready for your chapter's event information can be sent to campus media or students to help promote the week's events.
- **News release help** - Mortar Board has provided a template for Mortar Board Week news releases, a sample release for a fictional chapter, a handy Mortar Board Week fact sheet and a useful Mortar Board Stylebook.



OFFICER TIPS AND RESOURCES

While leadership of a Mortar Board chapter will require a lot from you, there are many resources available to help you maintain an active and vibrant chapter.

INCREASING PARTICIPATION

Action is what sets Mortar Board apart from other honoraries and honor societies. Mortar Board chapters are expected to be an integral and vibrant part of campus life, and members should understand that their participation in chapter meetings and events is necessary.

As we mentioned earlier, people help support what they help create, so be mindful of how you as officers can cultivate active participation from your members. Here are some things to keep in mind:

- Get the entire group involved in decisions about chapter events and initiatives. Early approval or consensus on programs for the year is important
- Brainstorm early, set goals, communicate those goals. Be creative!
- Give everyone a responsibility; committees are ideal ways to get everyone involved. Possible committees might include:
 - *Alumni relations committee*: locate Mortar Board alumni and invite them to activities; encourage them to form an alumni group. The National Office is an excellent resource for helping chapters find their alumni.
 - *Membership committee*: with membership chair, secure eligibility lists and standards, organize the selection of new members, tapping ceremony, orientation activities, initiation ceremony.
 - *Chapter history committee*: dig through archives at your campus to find out past activities; if there is a significant anniversary approaching, schedule an event to commemorate; work with alumni relations committee to involve alumni.
 - *Public relations/publicity committee*: promote Mortar Board; find ways to publicize the group, send articles to local print media on projects done by chapter, help plan Mortar Board Week promotion.
 - *Fundraising committee*: assist fundraising chair or treasurer to brainstorm fundraising ideas and organize fundraising events.
 - *Service committee*: strategically plan events that serve the campus or alma mater and execute Reading is Leading efforts.
 - *Social committee*: help the social chair to plan social events for the chapter as well as icebreakers for each chapter meeting.
- Work with your section coordinator to get additional ideas to motivate your members to stay active

STAYING ORGANIZED

Every member of your chapter is extremely busy—after all, it was your commitment to scholarship and your leadership of other campus groups that got you selected to Mortar Board!

As officers, good organization will help you keep your chapter on

track, keep your members informed and engaged, and, ultimately, will help ensure you are able to help prepare the next class of Mortar Boards.

Tips for staying organized include:

- **Go through any/all chapter files**
Discard duplications, outdated manuals/handbooks, etc. File any correspondence and paperwork in an organized fashion. When a similar event presents itself (for instance, a specific annual campus event), you can easily find papers relating to the event simply by going through the files.
- **Know the national minimum standards and deadlines**
By knowing what reports and forms and programs and events are expected of the chapter, you can plan ahead and not be suddenly surprised by a due date.
- **Make a calendar of events for the chapter**
With the other officers and committee chairs, write out a plan for the chapter's programming, social, campus, membership and fundraising activities. Check to see that events are planned enough in advance to allow for proper planning and see whether the events are scheduled far enough apart to prevent burnout. After discussing this calendar of events with the chapter and obtaining the chapter's approval (or "buy-in"), transfer this information to the Chapter Action Plan, which should be sent to the National Office on or before October 15.
- **Schedule the entire year's chapter and committee meetings**
Most campus leaders are very busy people and cannot attend a meeting scheduled last minute. Let the committee chairs schedule their own meetings, but it is best if the chapter meets on a designated night of the month (for example, the first Thursday of the month at 7 p.m. in the student union). The best time for a meeting is whenever the most members can attend. Be flexible, but sensible. Midnight on a Sunday is probably not the optimal time! Think of your advisors' schedules, too.
- **Over the summer, stay in touch with chapter members**
Send a reminder about the first meeting in the fall and share your conference experience with the chapter.
- **Communicate**
Often, simple communication can avoid misunderstandings or large time-wasters in meetings. If your officers and committee chairs can meet periodically between chapter meetings, many issues can be worked out before they become problems. Keep the officers and chapter informed of events being planned, progress being made (or the lack of progress). Make good use of email.
- **Document**
Write it down! If someone has an idea or a concern, write it down. If it is written down, a future Mortar Board chapter will be able to benefit from your experience.
- **Distribute**
Read and distribute communications from national or regional Mortar Board representatives, whether it be mail or email. Mortar Board e-newsletters contain vital national information, updates, reminders and additional resources for you. Read these materials immediately and share with your chapter.

- **Evaluate your progress**
Through periodic evaluation (self and chapter), you can find where your strengths and weaknesses lie and work to maximize your potential.

OTHER RESOURCES

- **Section coordinator (SC)**
Check with your SC (listed in this booklet on pages 29-30) for information about any scheduled meetings, ideas or past activities. Your SC is a valuable resource and can serve as a mentor and sounding board throughout your tenure.
- **Outgoing chapter officers**
Transfer files, discuss concerns, get membership reports, ask questions. All officers should meet with their predecessor. Orientation to the “job” is crucial! Simply dropping off a box of “stuff” is just not enough for Mortar Board.
- **Attendance at the national conference**
The new chapter president must make arrangements to attend the national conference, which provides intensive training, workshops and business sessions and is held each summer. Each collegiate chapter is required to have a delegate present at the annual national conference. Please also encourage other officers and advisors to attend the conference.
- **Your chapter advisor(s)**
They can guide you toward success due to their experience as an advisor and as a college or university staff member. They are the key to chapter continuity. They can not only answer questions, but provide inspiration and insight.
- **Other incoming officers**
Get to know each other, discuss and set goals, secure summer addresses, and discuss the budget. Send all contact information to the National Office.
- **Mortar Board National Office**
The first thing you need to do as president is send the contact information for all officers to the National Office using the Officer Address Information Form available at www.mortarboard.org under the “Chapter Resources” page. Contact the National Office by phone at 800-989-6266 or email at mortarboard@mortarboard.org for any help you may need.
- **Your chapter members**
They are Mortar Board members by virtue of their experience in scholarship, leadership and service. More than likely, they have many campus/community resources upon which to call, as well as their own ideas and experiences.
- **Other campus/community organizations**
If you’re feeling overwhelmed by the scope of a program you’d like to tackle, maybe another organization would be willing to cosponsor it and take on some of the work!

ATTEND THE CONFERENCE

Conference dates: July 20-22, 2012

Registration deadline: May 15, 2012

Each summer, chapter members from across the nation come together for the leadership experience of a lifetime - the Mortar Board National Conference! Participants are engaged from morning until night in sessions that advance their role as the leader of leaders on campus. Whether it is discovering how to motivate your chapter and build a team, viewing a model initiation ceremony, learning how to increase the number of membership applications your chapter receives, or engaging with other scholar-leaders at social events, the Mortar Board National Conference will leave a lasting mark as a memorable leadership experience.

While each chapter is required to send at least one delegate to remain in good standing nationally, there is much more to a Mortar Board National Conference than business meetings! You will develop competencies in leadership; enhance your personal skills in campus protocol, etiquette, and even résumé-writing; and grow in knowledge and understanding of a large national honor society — Mortar Board! You will spend the day with successful alumni, campus leaders and outstanding advisors, challenging you intellectually and connecting you to an awesome network of talent.

Conference fee

Each chapter is required to pay a \$250 conference fee in the spring (along with all membership dues) to help offset the cost of sending a member from each chapter to the conference. This fee covers less than a third of the actual cost to support a delegate’s attendance.

Official delegates

Each chapter must send an official delegate, typically the newly-elected chapter president, the only member from your chapter entitled to vote on all proposed national governance items. These growth opportunities at the Mortar Board National Conference are open to all chapter members, but there may be only one official delegate.

What you’ll do

- Enhance your leadership skills
- Learn how to run a collegiate chapter of Mortar Board as president, officer, advisor or member
- Get acquainted with other scholar-leaders across the United States
- Meet distinguished and award-winning Mortar Board alums
- Familiarize yourself with the rich traditions and interesting history of Mortar Board
- Guide your own experience by choosing development topics that are beneficial to you personally as well as in your role as a leader of your chapter
- Rub elbows with the national leaders of Mortar Board
- Explore personal and professional development topics that will benefit you
- Share great ideas with other Mortar Board chapters
- Have a total blast!

OFFICER TIMELINES

Some of these duties are specific to a certain officer, as indicated. However, it is important that all officers know the general timelines and responsibilities of your chapter. This timeline is meant to serve as a guideline only and does not incorporate all necessary responsibilities, such as those required by individual colleges and universities.

SUMMER (MAY-AUGUST)

- Prior to the end of the academic year, meet with the outgoing officers to obtain their notes and records (saved in a binder/folder, data CD or flash drive) and get any tips for the coming year. One-on-one training should also be held with outgoing and incoming officers to review specific information for each office.
- Designate a binder to keep your notes and official records. Back up information onto a data CD or USB flash drive regularly.
- Create templates for your official documents (minutes, financial statements or newsletters, for example).
- The chapter president will attend the annual national conference as your chapter's official delegate. Other officers and members are encouraged to attend!
- When your chapter president returns from the conference, hold an officers meeting to get a head start on the planning for your projects throughout the year.
- Keep members connected throughout the summer.
 - Use email, social media or your chapter website to keep your members updated throughout the summer and build excitement for the coming year. Determine who—the communications chair or another officer—will be responsible for this.

FALL (SEPTEMBER-NOVEMBER)

- Chapter operations, which are the responsibility of all officers unless otherwise noted
 - Hold general membership meetings (held at least monthly throughout the academic years) and officer or executive board meetings
 - Distribute minutes or newsletters to all members after each meeting - secretary and communications chair
 - Publicize your chapter's planned events and activities and build your visibility on campus
 - Use your chapter website or social media to spread the word
 - Submit your events to be listed on your campus activities calendar and send press releases to your campus media
 - Send news of your activities to the national office so we can share it with other chapters and alumni. Email your news to mbforum@mortarboard.org
 - Participate in fall campus activities
 - Take photos and document each activity - communications chair, historian or secretary

- Regularly back up notes and files to a data CD or USB flash drive
- **Remember the October 15 deadlines:**
 - Chapter Action Plan (formerly the Chapter Planning Calendar and Membership Recruitment and Selection Plan, required) - Reports planned scholarship, leadership, and service projects, as well as the plan for membership selection
 - The membership chair will head efforts to plan new members selection, but all officers can help make this a successful process!
 - An overview of the basic process is: practice the selection process, publicize applications, accept applications, select members, report selected candidates to the National Office on the Official Membership Report, tap members only after **approved by the National Office**, hold an orientation, collect dues, initiate new members and submit all fees to the National Office
 - Develop your membership application, giving prospective candidates at least one month between the date the application becomes available and the due date. Be sure to collect all necessary information required by your chapter and by the National Office in the Official Membership Report (OMR). Publicize the application deadline heavily, using posters, letters, emails, Facebook, Twitter, announcements at student organization meetings, etc.
 - The communications chair or secretary work with the membership chair to create fliers and membership materials (if applicable)
 - Hold a practice selection meeting to ensure the selection process goes smoothly when the time comes
 - Recruit alumni to assist with initiation, either as speakers, participants or volunteers to help provide refreshments before or after the ceremony
 - Chapter Project Grant application (optional) - any member can apply for funding for a project your chapter is planning
 - *Mortar Board Forum* magazine submission (optional) - your communications chair, secretary or historian should submit articles, pictures and chapter news to *Mortar Board's* magazine
- **Remember the November 15 deadline:**
 - Nominate outstanding alumni for Mortar Board's prestigious annual alumni awards (optional) – any member, likely the alumni chair

WINTER (DECEMBER-FEBRUARY)

- Encourage chapter members to apply for Mortar Board's national postgraduate fellowships on or before January 31
- Celebrate national **Mortar Board Week February 12-18, 2012**
 - Plan early for national Mortar Board Week (February 12-18, 2012) and the applicable publicity and visibility efforts. A folder of helpful resources, including

e-postcard templates and poster artwork, is available online at www.mortarboard.org/MBWeek

- Record any chapter events for your group's historical archives; add photos and event descriptions (with dates and attendance rates) to the chapter scrapbook
- Collect any mentions of Mortar Board or chapter members in local or campus newspapers or publications
- Invite alumni to help celebrate the week
- Chapter operations, which are the responsibility of all officers unless otherwise noted
 - Hold general membership meetings (held at least monthly throughout the academic years) and officer or executive board meetings
 - Distribute minutes or newsletters to all members after each meeting - secretary and communications chair
 - Publicize your chapter's planned events and activities and build your visibility on campus
 - Use your chapter website or social media to spread the word
 - Submit your events to be listed on your campus activities calendar and send press releases to your campus media
 - Send news of your activities to the national office so we can share it with other chapters and alumni. Email your news to mbforum@mortarboard.org
 - Participate in winter campus activities
 - Take photos and document each activity - communications chair, historian or secretary
 - Regularly back up notes and files to a data CD or USB flash drive

SPRING (MARCH-MAY)

- Passing the torch: new member selection, tapping and initiation
 - Hold the formal selection meeting you planned using this guide and the Chapter Action Plan (formerly the Chapter Planning Calendar and Membership Recruitment and Selection Plan) to select new members - membership chair leads this
 - Report selected candidates to the National Office using the Official Membership Report (OMR) no fewer than **two weeks before** your scheduled tapping. Selected candidates are not yet members! You may not tap before these candidates are approved to become members by the Mortar Board National Office - membership chair leads this
 - Based on the candidates reported on your OMR, the Mortar Board National Office will ship you official pins and membership certificates for all approved new members to arrive in time for initiation. Any unused pins or certificates must be returned - membership chair
 - Officially "tap" candidates to become Mortar Board members. The tips in the Membership Selection Handbook will help to make this notification of new members a truly memorable process
 - Take photos and videos of chapter membership ceremonies such as tapping, orientation and initiation - historian or communications chair

KNOW THESE DATES

This might be the second time you have read this, but we only repeat it because it is so important!

There are several reports that chapters send to the National Office throughout the year. These reports help us know how to best support your chapter. Some of them—such as the Chapter Finance Report, which is used to help us file our tax return—are required by federal law.

Plan ahead for these reports and make sure you know who is responsible for completing them. It will cause you a lot of unnecessary stress if you wait until the last minute! More information about the report and what information is needed is available in the appropriate officer's section starting on page 16.

The president should keep track of the reporting and ensure that everything is submitted to the National Office on time.

Important report and application dates:

October 15

- **Chapter Action Plan*** (formerly the Chapter Planning Calendar and Membership Recruitment and Selection Plan, required) - President reports planned scholarship, leadership, and service projects and, with membership chair, reports the plan to select new members
- **Chapter Project Grant application 1:** Any member
- **Mortar Board Forum submissions:** Communications chair or secretary

November 15

- **Alumni award nominations:** Any member

December 15

- **Mortar Board Week Visibility Grant application:** Any member

January 31

- **Mortar Board Fellowship application:** Any member

March 15

- **Excellence in Advising Award nominations:** Any member
- **Conference registration opens:** President
- **Conference Assistant application:** Any member
- **Mortar Board Forum submissions:** Communications chair or secretary

May 15

- **Chapter Annual Report:** President
- **Chapter Finance Form:** Treasurer
- **Advisor Annual Report:** Advisor
- **Final Official Membership Report (OMR):** Membership chair
- **Historian Annual Report:** Historian
- **All fees due one week after initiation:** Treasurer
- **Officer Address Information Form:** President
- **Annual chapter award nominations:** Any member
- **Chapter Project Grant application 2:** Any member
- **Conference registration closes:** Your new chapter president should be registered for the conference by this date

All of these reports are available at <http://www.mortarboard.org/forms/index.html>

- Collect dues prior to initiation. A candidate should **not** be initiated prior to paying her or his membership dues - membership chair and treasurer
- Hold an orientation to inform candidates about Mortar Board involvement. Plan other get-acquainted programs
- Hold a special, traditional initiation ceremony with members, their families, administrators and faculty
 - Invite local alumni to be a part of your initiation ceremony. There is a speaking part for alumni in the ceremony.
- Following initiation, ensure that the Official Membership Report (OMR) and all necessary fees have been submitted to the Mortar Board National Office
 - Within one week following initiation, complete the Official Membership Report (OMR) by marking the status of selected candidates appropriately (paid, refused, abroad or honorary) - treasurer
 - Submit all new membership fees, continuing member fees, and the \$250 chapter conference fee with a copy of the OMR to the National Office immediately following initiation (within one week) - treasurer
- Hold officer elections
 - Take notes, recording detailed contact information for all new officers elected - secretary
 - Following officer election, submit the Officer Address Information Form - president and secretary
- Hold a chapter and officer transition
 - Ensure that all fees have been submitted to the Mortar Board National Office and that all of the chapter financial accounts are in good standing and properly audited prior to the transition of responsibilities to a new officer - treasurer
 - Pass your binder with all of your notes and records to the new officer and hold a thorough one-on-one training session
 - Exchange contact information so they can contact you for assistance if needed
- Encourage the new chapter president to register to attend the annual national conference during the registration period, March 15 - May 15
- Update or write your chapter's history and save it for your chapter's historical records. Send this to reports@mortarboard.org on or before May 15 - historian
- Chapter operations, which are the responsibility of all officers unless otherwise noted
 - Hold general membership meetings (held at least monthly throughout the academic years) and officer or executive board meetings
 - Distribute minutes or newsletters to all members after each meeting - secretary and communications chair
 - Publicize your chapter's planned events and activities and build your visibility on campus
 - Use your chapter website or social media to spread the word
 - Submit your events to be listed on your campus activities calendar and send press releases to your campus media
 - Send news of your activities to the national office so we can share it with other chapters and alumni. Email your news to mbforum@mortarboard.org
- Participate in spring campus activities
 - Take photos and document each activity - communications chair, historian or secretary
- Regularly back up notes and files to a data CD or USB flash drive
- **Remember the March 15 deadlines:**
 - *Mortar Board Forum* magazine submission (optional)- your communications chair, secretary or historian should submit articles, pictures and chapter news
 - Excellence in Advising Award nominations for chapter advisors (optional) – any chapter member can nominate your advisor for this prestigious award
 - Conference Assistant Application and recommendation (optional) – After spending an active year in Mortar Board, attend the conference to help train the next class; any member can apply
 - **Conference registration opens:** Plan to attend the Mortar Board National Conference July 20 - 22, 2012, in Chicago, Ill.
- **Remember the May 15 deadlines:**
 - Chapter Annual Report (required) – President or vice president reports on your chapter's activities for the year
 - Chapter Finance Form (required) - Submit the Chapter Finance Report to the Mortar Board National Office on or before May 15. The IRS requires the Mortar Board National Office to have this report on file from each chapter to maintain the nonprofit, tax-exempt status of the organization
 - Advisor Annual Report (required) - Advisor completes this summary of the year
 - Final Official Membership Report (OMR) and fees (required, if not already done) - Report all those who were tapped and initiated, as well as those who refused membership to the National Office (*start the report in the winter prior to tapping and complete one week after initiation*); treasurer, membership chair and president work on this
 - Officer Address Information Form (required) - The new or outgoing chapter president reports your new officers' names and contact information
 - Annual chapter award nominations (optional) - Earn recognition for all of your hard work during the year by nominating your chapter for the Project Excellence Award, Golden Torch Award and Most Improved Chapter Award; typically the chapter president, advisor or section coordinator nominates a chapter for awards using these forms, although it can be any chapter member
 - Chapter Project Grant application (optional) - Any member can apply for funding for a project your chapter is planning
 - Conference registration closes - Your new chapter president should be registered for the conference by this date

BE VISIBLE

Visibility on your campus is essential for the ongoing success of your chapter!

You want faculty and staff to know Mortar Board--not just as an honor society, but as an honor society that is an integral part of campus life. Does your university president need a select group of students to meet with a distinguished alumnus or alumna? Mortar Board would be perfect for that. Is your honors program starting a new initiative to help support freshmen on your campus? Yep, a few Mortar Boards could lead that process.

Increasing your visibility can not only secure a solid reputation for your chapter, but can lead to wonderful opportunities for your members. And, if you are an organization that faculty and staff turn to when they want something important done, you will be an organization that students would love to be asked to join.

Sure, newspaper ads and social media should be a part of your efforts. But, you will make the biggest statement by what you **do** on your campus. All of your officers and members should be part of your visibility efforts. Here are a few ideas to help you get started on your publicity planning:

- **Honor and feature your faculty and staff** through awards, receptions or dinners, or other similar events. Hosting lecture series or other public forums or writing a "Professor of the Month" news feature can also be a way to recognize the contributions of faculty.
- **Find a need on your campus and fill it.** If your school has service initiatives or projects in your campus community, make these part of your service.
- **Host events that promote scholarship, leadership and service;** in doing so, you will help communicate what Mortar Board is all about.
- **Encourage underclassmen** in those same areas—reaching out to freshmen and sophomore students will not only help fill a need on your campus, but will be a great recruiting tool.
- **Be a prominent part of campus life**
 - Sponsor a banner at a football or basketball game
 - Have a table at the student center or involvement fairs with fliers about the event or organization
 - Sell campus phone directories or exam week snack packs
 - Host a finals study break with snacks and events for students
 - Have a Homecoming representative or participating in the Homecoming parade
 - Placing "stuffer" ads in the campus newspaper
 - Participating in high-visibility charitable events such as Relay for Life or Race for the Cure as a team while wearing Mortar Board T-shirts or clothing
 - Make your tapping and initiation public and visible events
- **Make a statement with Mortar Board apparel:** wearing Mortar Board T-shirts or sweatshirts on campus on a designated day, wear your Mortar Board pin on meeting days and daily during Mortar Board week, and wear your Mortar Board medallions, cords or stoles at graduation or other special ceremonies.
- **Make it easy for anyone on your campus to find information about you**
 - Place ads in your campus newspaper or post fliers around your campus
 - Placing PSAs (public service announcements) at athletic events or on the campus radio station
 - Create (and keep up to date!) a chapter website and social media pages
 - Create a photo website with a password all members can use to create an online community scrapbook, using a program such as Webshots or Flickr
 - Encourage members to link to the Mortar Board website, photo page or groups in their online buddy profiles, if applicable
 - Put announcements or notices in faculty and staff newsletters

Resources to help you promote your chapter

Your campus public relations, community relations or media relations department
Service club leaders on campus and in the community
Local businesses that might cosponsor a project
Local Mortar Board alumni or your alumni office or association
Your Mortar Board section coordinator
The Mortar Board National Office

OFFICER RESPONSIBILITIES

Many students who become officers in their Mortar Board chapters have already served other student organizations on their campus in a similar capacity. The following officer descriptions are meant to focus on duties specific to Mortar Board that may not exist in another organization.

If you have questions about leading your chapter, feel free to contact your section coordinator or seek out additional training from the student activities office on your campus.

PRESIDENT/VICE PRESIDENT

As chapter president or vice president, you have the responsibility of overseeing the chapter's operations. While this may sound like a daunting task at first, be assured you have many resources and many people to help you!

Responsibilities to your chapter

- Call chapter meetings and establish a regular meeting schedule
- Preside fairly at chapter meetings
- Facilitate chapter goal-setting
- Meet with other officers regularly; at the first meeting, ascertain that chapter accounts are current and cleared with the National Office
- Encourage, support and motivate the chapter
- Represent the chapter as requested
- Update college/university administrators on chapter activities
- Offer chapter assistance to the college/university
- Be familiar with national *Bylaws* and policies, as well as with chapter bylaws and policies
- Thoroughly review the national Chapter Minimum Standards on page 4 of this booklet, and make sure these requirements are being met
- Make sure that a solid schedule for selecting new members is in place.
- Share Mortar Board, Inc. and Mortar Board National Foundation information with members
- Review and maintain chapter files during the year
- Verify plans and implementation of the next chapter's orientation; preside over initiation of new chapter members
- Implement transition/orientation of new officers, advisors and the transfer of resources and files
- Encourage members to remain in contact with Mortar Board after graduation and to become Alumni Sustaining Members

National responsibilities

- Send the names and contact information of new officers and advisors to the National Office via the Officer Address Information Form by the deadline
- Maintain ongoing communication with national leadership

and communicate with the National Office and your section coordinator as often as you can and, at least, by meeting national report deadlines.

- Serve as the official chapter delegate to the national conference and relay information obtained to chapter officers and advisors
- Correspond with leaders from other Mortar Board chapters and student representatives from the National Council
- Ensure that all national reports are completed and submitted by each report's published deadline; the president is personally responsible for submitting the Officer Address Information Form, the Chapter Action Plan (CAP, formerly the Chapter Planning Calendar and Membership Recruitment and Selection Plan) and the Chapter Annual Report, and may additionally be responsible for submitting other required reports or delegating that responsibility to other officers
- Verify that the following reports were completed and sent by the indicated officer:
 - Membership chair - The selection plan in the Chapter Action Plan (CAP), Official Membership Report (OMR)
 - Treasurer - Official Membership Report (following payment of all fees), Financial Report, IRS Form 990 where appropriate
 - Advisor - Advisor Annual Report
 - Director of communications - articles for the *Mortar Board Forum*

Tips for setting the tone for your chapter

As president, it's ultimately up to you to see that the chapter functions, is productive and benefits both the chapter members and the campus through its programs and events. Sometimes problems can be solved before they occur through the setting of a positive tone for the chapter. Consult your section coordinator frequently.

- **Be organized for meetings**
Use your members' time wisely. If one sentence can provide the information, why use three paragraphs? Keep unnecessary digressions to a minimum. This doesn't mean the chapter president should be a dictator, you should just keep things focused and moving. Committees should report in meetings — not have their meetings during the meeting!
- **Set goals that are measurable and attainable**
With the chapter, decide what goals the chapter would like to work toward and set dates for evaluating the progress. To have a sense of accomplishment along the way, refrain from making all goals long-term. A more positive sense of achievement will be fostered if you can set goals that can be met as the year goes on.
- **Encourage and find ways to get all members involved**
If members feel a sense of ownership in an organization, they will also soon feel a sense of loyalty and commitment. Some members may have a limited amount of time which they can expend on Mortar Board, others much more. Through programming and scheduling, try to get everyone involved at some level.
- **Fulfill commitments you make to a member or the group**
To gain someone's respect, you must earn it. Remember

that you're human and have only a certain amount of time. This doesn't mean you should shirk responsibility. Leaders lead best by example.

- **Set aside time for the members to be social**
Occasionally hold a chapter meeting away from campus, where members can stay and socialize afterwards. Members may not see each other at any time other than meetings, especially on larger campuses. A cookout in the fall or an event around a holiday is also a good idea.
- **Set and stick to a budget (created with the chapter and treasurer)**
No chapter likes to continually hear that money is a problem. Fundraising is sometimes a necessary evil. Work as a unit to have a positive balance in the checkbook and often a positive attitude will be easier to attain.
- **Work to stay positive**
It's very easy to dwell upon negatives and overlook all the positives. If you can encourage others rather than discourage, success will follow. Praise for work well done!
- **Delegate**
Part of leadership is the delegation of responsibility. You can't do it all, nor can you do it alone. Your Mortar Board members are strong leaders with experience at handling projects and responsibilities. Delegate as much as you feel comfortable. Remember that with delegation comes the responsibility of checking to see that the assignment is being completed.

Above all, as a chapter leader, remember there is a limit to your ability and time commitments. You cannot do it all. After time, you will realize that while you can provide leadership, you cannot do all the work for the chapter. Provide a conscientious example, fulfill your obligations and responsibilities to the chapter and then work to help them succeed. By helping each member to improve and learn, you have succeeded as a student, a chapter leader and a Mortar Board member.

SECRETARY

Being elected secretary of your chapter is a big responsibility. It may seem easy to keep notes during meetings and transform them into minutes, but it's also one of the most important jobs a member can hold. If you don't keep accurate minutes and distribute them to your members, not only does that lead to an uninformed chapter, it also leaves behind no permanent record of your chapter's activities — a record that is vital for chapter continuity.

Responsibilities to your chapter

- You are the source of organization. Keep a binder of all minutes, correspondence and chapter paperwork
- Record minutes of each meeting and distribute copies to all members. Minutes should be a simple record of decisions made and a gist of the discussion. You don't need to record what each member said exactly — just summarize the action taken
- Keep accurate roll of members' attendance at all official functions
- Notify members and advisors of place and time of meetings

- Notify (in coordination with membership chair) new members of their selection after they have been approved by the National Office
- Notify (in coordination with membership chair) new members of their orientation date and time
- Orient and turn over all materials to your successor

National responsibilities

- Verify that any essential chapter correspondence is sent to the National Office (*i.e.*, reports, member documentation, etc.)

Tips for taking minutes

Here are a few tips on what should be included in each meeting's minutes:

- The type of meeting (whether it is a general chapter meeting or a special meeting)
- The name of the organization
- The date, time and place of the meeting
- The names of the presiding officer and the secretary, or the names of any substitutes
- The fact that a quorum was present
- The fact that previous minutes were read and approved, or approved with corrections
- The fact that certain reports were presented, including the name of the member presenting the report, any action taken on the report and a reference to a file where the report may be found
- The name of the mover of each main motion and the exact text of each main motion
- Names of those who second motions are not included in minutes.
- The disposition of each main motion, including any amendments and whether the motion was adopted, defeated, postponed, referred to a committee or disposed of in some other manner
- Any notices of motions to be introduced at future meetings
- Points of order and any rulings that set precedents for future meetings
- All counted votes should be recorded in the minutes (for example: 59 yes, 13 no or 59 in the affirmative, 13 in the negative).
- The time of adjournment
- Type your minutes on a computer and save to a CD or flash drive to pass on to the next chapter secretary.
- Remember that minutes do not become an official record until they have been approved.
- When the minutes have been approved, write the word "approved" with your initials and date below the minutes.
- You should keep the participation records of chapter members. That is, note in the minutes who is in attendance and who is not.

- In a timely manner, communicate information about your next meeting (including date, time and location) to your chapter by putting it at the end of the minutes. Send minutes to all chapter members, advisors and administrative liaison.

Distribution and filing of minutes

Minutes should be distributed to all members, advisors, administrative liaison and your section coordinator. Distribute through campus mail, email, U.S. mail or box for pick-up at student union desk or mailboxes in chapter office. Minutes must be filed as part of the chapter archive. Work with your chapter historian to maintain or create such an archive.

Other information regarding the roll and correspondence

- Keep a permanent roll book and all initiation information
- Write thank-you letters to all who help with any part of the Mortar Board year
- Maintain documentation of correspondence with the National Office
- Keep records of any dismissals
- Attend all executive committee meetings and chapter functions

TREASURER

As treasurer of your Mortar Board chapter, you will serve on your chapter's executive board and give monthly attention to the details of bookkeeping and managing the money. It is essential that a budget be prepared, fundraising be successfully accomplished (or donations received) and funds disbursed with accuracy and timeliness. You are entrusted with a serious responsibility to monitor individual membership fees, complete the Official Membership Report (OMR) and send it to the National Office. The completion of the Chapter Finance Report is also your duty and must be submitted on or before May 15. For chapters still completing projects at this time, incomplete financial records should be submitted. Serving as the treasurer of your Mortar Board chapter is a large responsibility.

Responsibilities to your chapter

- Serve as a signatory on chapter bank accounts
- Oversee or serve on fundraising committee
- Establish a chapter budget
- Provide regular financial reports or updates to chapter
- Collect membership fees from all new and continuing members prior to initiation (for submission to the Mortar Board National Office)
- Execute end-of-year audit of chapter financial records and orient your successor

National responsibilities

- Confirm (with predecessor) that Chapter Finance Report has been sent to the National Office on or before May 15
- Send a Mortar Board chapter check (payable to Mortar Board, Inc.) to the National Office for all fees (new member

fees of \$75 for each new member, continuing member fees of \$25 for each returning member, plus the \$250 chapter conference fee) with a final copy of the OMR. If these fees are not paid, the chapter may be put on probation and membership is not official for new members. The chapter and its members are also ineligible for chapter awards, grants or fellowships

- Complete and submit Chapter Finance Report to National Office no later than May 15 annually
- Complete IRS Form 990 only if your chapter's annual receipts exceed \$25,000; submit this form to the IRS and an additional copy to the National Office

Tips for managing your books

Review the chapter financial records

At the beginning of your term, review your chapter's bank statements, prior budget, any relevant IRS forms and previous Chapter Finance Reports. Make sure you have forms (and create them, if needed) for transactions like reimbursements and receipts.

Both you and the chapter advisor should be signatories on your accounts. Always keep the chapter finances and the checkbook balanced.

How you can spend your money

Because Mortar Board is a nonprofit, tax-exempt charitable organization, there are rules about how your chapter monies can be spent. Remember that your spending must benefit the organization as a whole and not any individual member.

In debt?

If your chapter is in a deficit position or owes money from the previous year, immediately contact the National Office and your section coordinator.

Minding our 501(c)(3)'s

Mortar Board, Inc. is considered a charitable organization by virtue of its classification as a tax-exempt organization under section 501(c)(3) of the Internal Revenue Code. Because of its connection with Mortar Board, Inc., your chapter is considered a charitable organization as well; and your chapter has a federal tax identification number (if you need it, please call the Mortar Board National Office). As a charitable organization, your chapter is eligible to receive tax-deductible donations so long as no goods or services are received by the donor in return for the donation.

Status as a charitable organization may mean that, in your state, your organization is exempt from the payment of state sales tax. Your chapter may be required to file a report with your state auditor annually verifying your status as a charitable organization. Sales tax exemptions usually mean that your chapter need not pay sales tax on items purchased for the good of the organization (e.g., copies of the printed program for your fundraiser) but must pay sales tax on items that will be used by individual participants or members solely for their personal benefit (like a leather portfolio that the member buys through the chapter for use during or after the event). Each state has its own policies.

The completed Official Membership Report (OMR)

You need to verify the status of each candidate and whether or not he or she is paid, refused, honorary or abroad – and submit this information to the National Office.

For each candidate, the treasurer needs to designate the following on the Official Membership Report (OMR):

1. Check that the candidate has paid the national membership fee of \$75 and then was initiated in the ceremony; ***under no circumstances may a candidate be initiated before the membership fee has been paid.***
2. Account for any candidate who refuses membership (a rare occurrence).
3. Indicate if the chapter is using the Coral Vanstrum Stevens gift membership. Only one gift membership may be awarded to your chapter each year, although the gift amount may be divided between more than one candidate. A candidate receiving the gift membership should be initiated and considered “paid” in the OMR. The treasurer will be notified by the chapter president and senior advisor or administrative liaison, if any candidate(s) will be awarded the gift membership
4. Indicate if a candidate is studying abroad, so that she or he may be initiated upon return to the campus next fall.
5. Report the names of continuing seniors. There is a \$25 fee for each member continuing as an active member.
6. Submit the \$250 chapter conference fee.

When you have designated the status of every candidate on the list, print a copy of the submitted Official Membership Report. Resubmit it if there have been any changes. Make sure that all fees have been submitted to the Mortar Board National Office to remain in good standing.

MEMBERSHIP CHAIR

Membership chairs are charged with overseeing the new member selection process, one of the most important roles a Mortar Board chapter fulfills throughout the year. As a membership chair, you must make yourself and your chapter very familiar with national selection guidelines and procedures. ***Tip: You must download and thoroughly read the Membership Selection Handbook, available at www.mortarboard.org/membership.***

Responsibilities to your chapter

- Become thoroughly familiar with the membership selection process outlined in the Membership Selection Handbook
- Orient and discuss membership selection procedures with chapter and advisors
- Conduct membership selection
- With the chapter president and other officers, plan and conduct tapping and initiation
- With president and other officers, conduct orientation session at a time prior to chapter initiation ceremony
- Orient and turn over all material to your successor

CHAPTER WEBSITES

A chapter website is a great way for you to communicate with your members as well as your campus community. If you plan to have a website, it is important to keep it up to date!

If you don't have the time or resources to update a website frequently, you may only want to include basic information about your chapter. These basics should include:

- College/university name and link to college/university's home page
- Local chapter name
- Mortar Board's name (Mortar Board, Inc., National College Senior Honor Society)
- Mortar Board, Inc., official logo
- Link to national Website: www.mortarboard.org.
- Brief description of the national organization (can be taken from information found in the Member Guide)
- Local chapter name and history (the year the individual Mortar Board chapter was founded is given in the Member Guide)
- Mortar Board ideals: scholarship, leadership and service; include what the chapter does in each of these areas.
- Contact information (current chapter president, advisor or communications chair)

If you do have a communications or technology chair who can devote time to keeping your site up to date, some additional information to add is:

- List of chapter officers and advisors with contact information
- Calendar of events with contact information for activities sponsored by the chapter, including Mortar Board Week and national project activities
- Quotes from active members
- Notable alumni
- Selection procedure - include criteria for GPA (3.0 minimum or top 35 percent of junior class); important dates for submission of information sheets, selection, tapping, orientation and initiation; and, perhaps, an information sheet
- Photos of recent chapter activities

Any Mortar Board chapter in good standing has the right to download or to reproduce within its chapter Website any images, logos and forms available on the national website. Individual members must obtain permission in written or electronic form from the National Office to use this information.

National responsibilities

- Help the president complete the Chapter Action Plan (CAP, formerly the Chapter Planning Calendar and Membership Recruitment and Selection Plan) in the fall prior to its October 15 deadline
- Carefully complete the Official Membership Report (OMR) for approval after selection of new members, then passes the approved Official Membership Report (OMR) to the treasurer to verify that membership fees have been paid

Tips for managing the membership process

- Use the Membership Selection Handbook to make selection a thorough yet pleasant experience for your chapter. This handbook, available online, contains thorough information on how to prepare for and conduct membership selection, tapping, initiation, and new member orientation
- Stay in close contact with university personnel and your advisor in order to obtain necessary GPA data on potential members.
- Use the help of a membership selection committee to help you spread the word about membership, gather applications and nominations, and make arrangements for the selection meeting
- Become thoroughly familiar with the selection principles outlined in the Membership Selection Handbook so that you can answer questions from other chapter members
- Conduct a practice membership selection session with your chapter before the real thing. This will allow members to become familiar with the process and also work out any questions that may arise so that the real selection meeting goes as smoothly as possible

DIRECTOR OF COMMUNICATIONS

As your chapter's director of communications, you have the responsibility of making sure your chapter's activities are publicized — both locally and nationally. To make Mortar Board's activities stand out, you will have to be creative in your resources and be prepared through advance planning. As soon as you are elected, you should begin planning your public relations strategy for the next year. Touch base with the previous director of communications to get her or his notes and personal insights into the job.

Responsibilities to your chapter

- Establish good relations with campus/community media and submit newsworthy items about your chapter activities to them
- Keep a notebook of activities, deadlines and resources
- Orient successor and turns over all material to same
- Maintain content on the chapter Website or oversee its production

National responsibilities

- Submit contributions for publication in the *Mortar Board Forum* on or before October 15 for the fall/winter edition and March 15 for the spring/summer edition

Tips for sharing your story

Having a thorough publicity plan will help you maximize your opportunities to get the word out about your chapter. Defining your objectives is the first step. Do you want to increase participation in your campus events? Do you want to generate the support and recognition of your campus administration? Work with other officers to establish your visibility goals and then make a plan to achieve them.

When you want to involve your campus or local media in your publicity efforts, you should make sure your news content is:

Timely: Things that are new, current and up-to-date are attractive to the media. In addition, the media needs to be made aware of an event in good time. Find out how much lead time the news organization needs.

Significant: The more people your story or event will impact, the greater its significance to a news organization. Also, proximity plays a role--the closer the story to home, the more newsworthy it is. Finally, if your news includes well-known people or a prominent local figure, it instantly becomes more interesting to the media.

In addition, a human-interest story can help your chapter gain publicity. Did someone in your chapter do something great? Is she or he getting some sort of special recognition? Send out a press release from Mortar Board about these accomplishments along with contact information and interesting bits of the story that could make for a great human-interest piece.

Whom to contact

Take note of the local and campus media. Get to know appropriate contacts on a first-name basis. Find out how much lead time they need before an event, whether or not you need to supply your own photographs, what kind of stories make good features, and how they prefer to be contacted.

Other tips

- Always follow the Associated Press (AP) Stylebook for anything you send to the media. You can buy one at a local bookstore or online at www.apstylebook.com.
- Proofread your work, or have someone else take a look at it. Mistakes can make you look unprofessional, so take the time to check for spelling, grammatical or factual errors!
- Always include your contact information on the news release, as well as the information of who can answer any questions the media may have.
- Members of the media like to receive their press releases in different ways. Many prefer email copies of the press releases, especially if the station or paper has a smaller staff.
- If you are sending your press release via email, remember you have to sell it in the subject line.
- Be sure you are getting in touch with the right people. Send press releases to local radio stations, television stations, magazines, newspapers, free publications and even news organizations like the Associated Press.
- Don't be afraid to pitch to national media if you think your story is newsworthy. Go big and try to get in touch with Fox, CNN, ESPN or national affiliates of ABC, CBS and NBC.
- Seek assistance from chapter members who are journalism or communications majors; consider forming a communications committee for your chapter
- Find out if the student activities office on your campus assists with graphic design, printing or copying
- Keep copies, in chronological order, of any communications or marketing pieces you develop (this will help you keep track of what you have done and serve as a great example for future chapters)

- Be sure to share important materials with your chapter's historian
- Contact the national communications manager at mbforum@mortarboard.org if you have questions

HISTORIAN

As chapter historian, you are vital to keeping Mortar Board's torch burning. The historian's role is important to Mortar Board because of the annual turnover of each chapter's membership.

The records and scrapbook are treasures to be passed on to the next chapter, serving as touchstones to its past and aids to its future development. This information is a record of the chapter's past service to the campus, a connection to chapter alumni and a testimony to the commitment of the members to scholarship, leadership and service.

Responsibilities to your chapter

- Compile chapter history as it is made through the year
- Review Mortar Board's history in your Member Guide
- Maintain chapter archives
- Take pictures and if possible record chapter events with video technology (share these materials with both the chapter and national communications manager)
- Collect newspaper clippings, videos and important correspondence
- Prepare a scrapbook detailing events of the year (this could be a separate book for each year or one, ongoing scrapbook)
- Send required and requested information to the National Office for the Mortar Board archives
- Locate the chapter's charter on campus
- Read the chapter history at initiation; note that if there is not one compiled, the historian will need to research and write this information for presentation
- Orient your successor and turn over all materials
- Provide a historical summary for your chapter Website
- Some chapters combine the historian position with other offices or chairmanships, and details on those responsibilities can be found in your chapter bylaws or records

National responsibilities

- Serve as a liaison to the Historical Publication Committee, which can be contacted at history@mortarboard.org
- Share chapter history with the National Office
- Submit Historian Annual Report on or before May 15

Tips for making history

Remember that the historian is noting history in the making. Keep a listing of meeting dates, activities, speakers, etc. for the development of the chapter history summary. Take photographs at meetings, activities and of people who helped the chapter during the year.

Start accumulating information very early in the year and work

HISTORICAL PUBLICATION

Mortar Board will celebrate its 100th anniversary on February 15, 2018!

In anticipation of that, the National Council has embarked on a journey to document our rich history. We are planning to publish a commemorative book illustrating Mortar Board's founding, its collegiate and alumni chapters, the role of its national leadership and the historical times that influenced changes in the organization throughout its many years.

The Mortar Board Historical Publication Committee was created to work on this project. Every collegiate chapter is encouraged to submit the following materials:

- A copy of your local chapter's history (for example, the history used in your chapter's initiation ceremony)
- The name and contact information of a person who can serve as a permanent contact person for your chapter's role in the national history project, such as an advisor or university faculty or staff member
- The Historian Annual Report, an update of the chapter's activities throughout the year, with photos (due on or before May 15)

Call the National Office at 800-989-6266 or contact the committee by email at history@mortarboard.org. Learn more about the project at www.mortarboard.org/history.

on the chapter scrapbook as the year progresses so you are not overwhelmed at the year's end.

Another great idea is recording chapter events electronically and creating an end-of-year video or DVD. This video can be distributed to graduating seniors, used as an orientation guide for new members or played at a year-end party or initiation.

Other ways to share your history:

Anniversary celebrations: You will probably be the first one to note the age of the chapter. Anniversary dates should be noted and celebrated (such as the 10th, 20th, centennial, etc.) It is a great idea to celebrate your chapter's anniversaries during Mortar Board Week, at Homecoming, initiation or all of the above! Be sure to include alumni and university officials in these landmark celebrations.

Bringing the past to today's meetings: Bring old scrapbooks to your chapter meetings or include a historical segment such as, "In this month 50 years ago, our chapter...." Scrapbooks could also be used during chapter orientation to share your history and heritage with new members.

Researching chapter history

If a written account of the chapter's history does not exist, here are some tips to aid in its preparation:

- Begin by looking up the charter year of the chapter in the Member Guide
- Contact the National Office for copies of its records on your chapter's chartering
- Seek out student affairs staff for information that may be on file from previous chapters. Interview the staff or former

staff members about their knowledge of the chapter's past. Also check with your school's archivist and student government offices—you will be amazed at how much they know!

- Campus yearbooks may provide chapter activity and member listings
- The National Office can provide a mailing list of area alumni you can contact for information

Writing the local chapter history

The chapter's written history used in your initiation ceremony will periodically need updating. The historian can delegate this task to a member who loves researching and history or work with a committee and divide the work.

Review the facts as well as the presentation style. Historical facts cannot be altered, but your choices of what to emphasize, what to omit and what sequence to use in presentation make a vital difference in what people will learn about the chapter long after you are gone. Be sure to annually send a copy to the National Office for the archives.

In considering the need for revision, take into consideration the following:

- Age of the chapter
- Whether or not you want to write a complete history with full records and use a summary of it at the initiation
- Does the written history follow straight chronological order, or does it use the flashback method
- Name of the person or people who were the impetus and motivator behind the starting of the chapter
- Name of the president or other administration officials who were in office at the time the chapter was started
- Name of the local organization that was transformed into Mortar Board. Note why was it named that and if the name became your chapter's name
- Date of installation of chapter plus name of installing officer
- Name of first advisors and of the first chapter president

ALUMNI CHAIR

Your work is vital to the national organization in locating your chapter's alumni and in fostering relationships with your local alumni. It is up to you to maintain (or to start, if necessary) an ongoing relationship with your former collegiate members. Just as they are alumni of your college or university, they are alumni of your chapter of Mortar Board. Think about the importance of your institution's alumni. What do they do for your institution and how do they stay in contact with each other and with their alma mater?

Mortar Board, Inc. has established the Alumni Sustaining Membership program, which gives \$5 out of every annual Alumni Sustaining Membership fee (the total fee is \$25) back to the collegiate chapter. Enrolling in the Alumni Sustaining Membership program is a great way to continue involvement in Mortar Board in addition to giving back to your collegiate chapter after graduation. Please encourage all graduating seniors to join the Alumni Sustaining Membership program.

Also, think about how to keep the spirit going among your

members after graduation and how to find local Mortar Board alumni who live nearby or work on campus. There may even be a Mortar Board alumni chapter in your area that can work with your collegiate chapter.

This job is for a "people person" who wants to be creative and have fun. Think in terms of getting in touch with local alumni and staying in touch with your own members from this year; most of the work is done if you enjoy meeting new people and keeping college friendships through the years to come. This means that you will be learning to motivate other people — something that will come in handy as you continue to be a leader in the world beyond college.

Responsibilities to your chapter

- Act as liaison with area and chapter alumni
- Establish and maintain a mailing list of chapter alumni for both local and National Office records
- Inform the National Office of alumni address changes—this can be done online on the Website
- Use mailing list to keep alumni informed of chapter activities
- Network with local alumni
- Develop your chapter's sense of national Mortar Board spirit
- Notify the National Office of famous alumni from your chapter

National responsibilities

- Informs the National Office of any permanent address or name changes
- Submits nominations for Alumni Achievement and Distinguished Lifetime Member Awards (due November 15)

Tips on connecting with alumni

- The Mortar Board National Office can assist with putting you in touch with area or chapter alumni.
- Local alumni in your area are often quite happy to help you organize joint events, especially when encouraged to attend special events like initiation and banquets.
- The alumni association at your college or university can help. If they have kept records of Mortar Board members through the years, they could be another great resource for locating alumni.
- Be sure to share any information you've been able to obtain for area alumni with the National Office (by doing this, you are ensuring that all records are up to date and that there is a back-up for them)
- Consider creating an area alumni newsletter, complete with information on upcoming events

Creating an alumni development plan

- Contact the local Mortar Board alumni chapter if one exists (for a list of alumni chapters, please visit www.mortarboard.org/alumni).
- If an alumni chapter does not exist in your area, announce that your chapter is looking for local alumni (you can do this by submitting information to your university's alumni

publication, student newspaper, or creating a Public Service Announcement for local television and radio media)

- For interested alumni who respond, add them to your mailing list and personally contact by phone or with a short note
- Encourage alumni to sign up for email newsletters on the national website, www.mortarboard.org
- Plan a combined collegiate-alumni event, possibly during Mortar Board Week or initiation
- Request help from your university's alumni association or development office in locating past members. You can also check chapter or national records for names of earlier chapter members
- Send updated alumni addresses to the National Office as you receive them; don't wait just because you don't get many at first
- Get ready for continued contact with current chapter members after graduation, when all of you will become alumni

Use alumni as a helpful resource

Mortar Board alumni have a wealth of experience and can enhance the chapter's year in Mortar Board. Here are some ways to utilize alumni in your area:

- Involve them in social events and service projects
- Encourage their participation in chapter tapping, orientation and initiation
- Invite them to speak at events or meetings
- Recruit them as advisors
- Consult with them to select community leaders as honorary members of Mortar Board
- Collaborate on selection of Alumni Achievement Award nominees. Nominate outstanding alumni for Distinguished Lifetime Membership or Alumni Achievement Awards using the nomination forms available online
- Celebrate significant chapter anniversaries together by inviting all chapter alumni to participate; begin plans at least two years in advance to reach all possible alumni and make all appropriate arrangements
- Keep them informed with an annual chapter newsletter

Making contact

First, find out if there is an alumni chapter in your area by checking the list at www.mortarboard.org/alumni. If there is, call the listed representative to arrange a meeting to share information. Alumni usually like to be on the mailing list and informed of chapter events, such as Mortar Board Week programming and initiation. Additionally, the Mortar Board National Foundation offers small grants for alumni relations projects. If you choose to apply for these grants, alumni may be able to help you develop the proposal.

This initial contact will make a real difference for your chapter because some alumni chapters provide financial and other support to local collegiate chapters. Be sure to remember that all the alumni members may not be from your collegiate chapter, but they are helpful additions to the mix that makes for exciting involvement.

Finding the lost ones

Locating alumni can be as easy as placing an announcement or a letter to the editor in your school's alumni publication. Most people will respond quickly if you set up a form for name, current address and phone. Remember to include space for women's maiden names. Include the chapter's return address and your name or the name of a contact person on the form.

Because Mortar Board did not receive addresses of initiated members before the early 1980s, there are literally thousands of "lost" alumni nationwide. This situation is complicated by the fact that the women most often were initiated under their maiden names. Therefore, not only addresses but also names have changed. Old chapter rosters, either in your chapter's records or in our national Mortar Board archives, have names. Your alumni and development offices will list current names and addresses of former collegiate members. Contacting these people will be good for the alumni and development offices as well as for Mortar Board. When you get updated addresses, be sure to send them to the National Office.

CHAPTER RECORDS

It is so important for you to record your chapter's activities through the year and pass on that vital information. Imagine how cool it will be when the Mortar Board class of 2050 can look back and see how much you did! The following records should be maintained and included in your chapter archives:

- Official membership records with required signatures, and your initiation roll book
- List of honorary members and related membership petitions
- List of advisors with dates of service noted
- List of area alumni
- Copies of the Chapter Planning Calendar, Annual Report, financial reports and IRS 990 reports (if applicable)
- Chapter and executive committee minutes
- Chapter history, to be updated every year
- Photos and clippings recording the chapter's activities, preferably in a scrapbook format

Store historical records in a safe, permanent (if possible) place versus passing a box around from advisor to advisor or officer to officer so the records are protected and always available.

ADVISOR/ADMINISTRATIVE LIAISON GUIDE

As a Mortar Board advisor, you will be working with the best and brightest on your campus. You will help channel the energy and creativity of these talented students to benefit your campus community.

Under your guidance, the students will be able to fulfill the high expectations of Mortar Board. Ultimately, you will help these bright members develop even stronger leadership skills and will help your chapter promote the Society's ideals of scholarship, leadership and service.

You might find that advising a Mortar Board chapter is different from working with other student groups. No doubt there will be some trouble-shooting along the way. That's what happens when great minds get together!

This Officer & Advisor Handbook is designed to give you a complete overview of Mortar Board, as well as specifics about your role as advisor. If you have any questions or would like clarification, feel free to contact the National Office. We're here to help you make the most of your role and your experience!

MORTAR BOARD ADVISOR EXPECTATIONS

Collegiate Mortar Board members are able, competent and imaginative. However, they bring no previous Mortar Board experience to their chapters. Advisors bring great individual contributions to the group and, if alums, are quite familiar with how Mortar Board functions. While being a member of Mortar Board is not a requirement to be an advisor, many chapters seeking advisors begin their search by contacting local alumni.

Active interest and participation by the advisors in the group functioning is necessary and desired by the chapters. The advisor's experience, knowledge of the institution and the community and commitment to education are the qualities brought to the group. These qualities are indispensable to whatever programs the chapters may decide to undertake.

Each chapter is unique. Understanding and fostering this uniqueness is an important role of the chapter advisor. Advisors are encouraged to meet with the chapter as a whole and chapter officers as regularly as possible so they may become acquainted with the members and be familiar with the chapter's goals in order to give helpful ideas and to assist in evaluating.

Advisors are not, of course, expected to direct the chapter's program or work, but the strongest Mortar Board chapters are invariably those whose advisors are genuinely interested and who are sufficiently close to the group to give suggestions and advice. Often these advisor-student relationships become some of the most meaningful experiences of the members and advisors. Chapters may nominate an outstanding advisor for the Excellence in Advising award each spring.

Advisors have responsibilities in the following areas (some of which are specifically addressed in *Bylaws*, Article VI, Sections 1.29 and 1.30).

- Attend as many meetings as possible (at least one advisor should be present at each executive board and chapter meeting)
- Attend all new member selection meeting and any meetings

prior to selection at which new member selection is discussed

- Contact the National Office via email, fax, or letter to attest that the selection followed Mortar Board procedures
- Assist in a thorough orientation for new members by providing information and support and ensuring that all pertinent information is communicated
- Encourage use of parliamentary procedure and meetings that are run in an orderly, efficient manner
- Assist in chapter programming
- Review the chapter budget
- Communicate campus policies and procedures and assist in cutting through the "red tape" when necessary
- Serve as a sounding board for chapter officers and members
- Be a resource for members especially in regard to college/university policies, regulations and services
- Aid in preserving the continuity of the chapter through minutes, files and traditions
- Be generally available to assist the organization
- Keep current with Mortar Board news by reading the *Mortar Board Forum* magazine as well as our e-newsletters
- Stay in touch with your section coordinator
- Maintain contact with the National Office
- Complete an Advisor Annual Chapter Report and submit by the deadline each spring (only one advisor from each chapter is required to complete this report)
- Aid chapters in identifying future advisors
- Confer as an advisory board periodically to provide the best continuity for the chapter
- Make sure that your Mortar Board chapter is current with its registration as a student organization with your student activities or dean of students office. Advisors provide continuity and there are few better ways to provide continuity than by being a registered student organization in good standing with the respective campus
- Remind the chapter of deadlines for reports and other paperwork that are due to the National Office
- Help facilitate officer transitions
- Assist the chapter in finding funding sources on their campus, through avenues such as student government
- Encourage the chapter to use its campus (student activities or student government) and national resources (National Office or section coordinators)

TERMS OF ADVISORS/DIVISION OF DUTIES

While chapters are only required to have one advisor, Mortar Board recommends that each chapter use three advisors and one administrative liaison (who could be one of the chapter advisors, as long as that person is a campus faculty or staff member). This guarantees a shared responsibility among the advisors as well as the chapter members and officers. Advisors could rotate terms in office by having a sophomore, junior and senior advisor designated with each term extending for no more than three years. Many

chapters find this model highly effective in rotating many interested parties through the role of advising the Mortar Board chapter, and a former advisor may be reelected by the current chapter membership for another term.

Alternately, many chapters retain the same advisor for many years of service. This could be because the advisor has "chapter advisor" in their job description with the institution, or are highly committed to the Mortar Board chapter on their campus. Different models work in different ways, depending on your campus culture and chapter precedents. If you have questions about how your current advising model is working on your campus, contact the National Office.

Many chapter advisors have split the duties of advising the various functions of the Mortar Board chapter among themselves. This method is flexible to encompass the particular chapter programming needs and will not overburden any one advisor. It also allows the sophomore advisor to go through a training period before assuming the responsibility of senior advisor.

INFORMATION AND RESPONSIBILITIES

General chapter operations

Each Mortar Board chapter is charged with the commitment to leadership and service to the campus and community under the name of Mortar Board. This commitment to active service in the chapter distinguishes those members accepting active membership from those who refuse. How the chapter chooses to fulfill this charge differs from chapter to chapter, from year to year. Advisor guidance in this area can be critical to the success of the chapter.

As noted in the *Bylaws*, advisors are required to review the chapter budget. Proper budgeting and planning to fund that budget can make or break a chapter in any given year. At the conclusion of the academic year, a Chapter Finance Form must be filed and sent to the National Office, as well as an IRS Form 990 for any chapters with income of over \$25,000. Copies of these forms can be located on the Mortar Board Website or by contacting the National Office. One of the most helpful legacies a chapter can leave behind is a clear, consistent record of its operations, successes and even failures. Taking time to write a summary report after an event (even an unsuccessful one), while not necessarily an anticipated joy, will greatly benefit future chapters, to help keep them from "reinventing the wheel."

A Chapter Action Plan (CAP, formerly the Chapter Planning Calendar and Membership Recruitment and Selection Plan) is required each fall to help the chapter plan its year. This form is very helpful in planning out timelines for programming, social activities, community service projects and membership selection. At the conclusion of the year, the chapter submits a Chapter Annual Report, revisiting goals and objectives from the Chapter Action Plan and evaluating successes and failures.

The National Office collects project ideas and programming events to share with chapters. Please be aware of the celebrations during annual Mortar Board Week, which occurs each year during February 15, the date of the founding of Mortar Board as a national honor society. Encourage your chapter to submit this information to the National Office via email or a formal submission to the *Mortar Board Forum*.

Forms/paperwork/mail

As mentioned in the previous section, certain forms are required to be filed by each chapter. These forms are critical to maintain national files and to assist the National Council in planning future conferences and goals. All forms are available to either submit online or complete electronically and submit via email. Forms are also accepted via mail and fax. The Advisor Annual Report is one that assists in development of recommendations for chapter operations and the formulation of suggestions for the delegates to the national conference. The frank appraisal of Mortar Board locally and nationally is of great assistance in these deliberations.

A consistent on-campus address for the Mortar Board chapter is required. Mailings can be quickly delivered to a chapter at a campus office address and then be distributed to the chapter accordingly.

Membership selection

The advisor also plays a critical role in the membership selection process by securing of grade point averages of prospective members and by ensuring the confidentiality of this information. Confidentiality is an important aspect of the membership selection process and includes not only grade point averages but also all discussions held on candidate qualifications.

Orientation

The best way to assure a successful chapter is to spend time and energy on a good orientation process. If the candidates are fully informed of Mortar Board's goals and purposes (both nationally and locally) before active commitment, they will be better prepared to fulfill those obligations.

While a great deal of emphasis is placed on a thorough orientation for the new members, it is critical to have the retiring chapter officers fully orient their successors. The advisor's responsibility, as noted in the *Bylaws*, is to cooperate in the planning of this officer orientation. Some chapters distribute a copy of guidelines for chapter officers before electing officers so that all chapter members are familiar with the commitment which must be made by a Mortar Board chapter officer. These guidelines are also appropriate for use in the officer training/orientation meetings and are adaptable for individual chapter use.

Dismissal of members

One particularly sensitive issue addressed in the *Bylaws* (Article III, Sections 1.11 - 1.13) is the dismissal of members for nonparticipation or other reasonable cause. The specific procedure for membership dismissal is outlined in these sections. Any questions you may have about participation policies or the actual dismissal procedure should be initially addressed to the section coordinator or to the National Office. Mortar Board encourages that a very strong participation policy be established and monitored on a regular basis, so that noncompliance can be addressed very quickly and effectively. Dismissal of members is a very serious action.

Develop your own style

An advisor is an individual who uses a form of leadership behavior to act as a measure of influence within the student group to stimulate it, interject new ideas or perspectives into it, and encourage its members. No one style of advising will work for

everyone. The advisor should decide to what extent he/she intends to use his/her influence within the group and should mutually agree with the student group as to the role and expectations of the advisor.

In practice, the advisor should perform maintenance, growth and content functions as appropriate to specific activities. However, it is precisely at these times, along with the three functions mentioned, that the advisor should bring in to play her or his experience, coupled with professional judgment and imagination, to make membership in the organization an educationally meaningful experience. The student organization advisor should go beyond the role of the passive bystander and be prepared to provide active and ongoing academic leadership to the student group when needed.

Connect with the National Office

Your Mortar Board chapter likely has—or has started making—rich traditions of its own. At the same time, each chapter is a member of a large, national organization. We can learn so much from each other! In order for us to continue to grow and improve as an honor society, we need your help.

There are several ways you can help ensure that your chapter maintains its national connections:

- Encourage your chapter officers to submit national reports in a timely manner.
- If you do not already receive our e-newsletters, send a quick note to mbforum@mortarboard.org so we can add you to the mailing list. These newsletters provide timely reminders and tips for you.
- Let your students know about the national conference. It is a great way to learn from other chapters and to get a national perspective!
- Join our online communities to find out what is happening in Mortar Board. Your online sources for news are:
 - www.mortarboard.org/news
 - www.facebook.com/MortarBoard
 - www.mortarboard.org/LinkedIn
 - www.twitter.com/MortarBoard
 - <http://blog.mortarboard.org>

Encourage outgoing members to stay connected

Mortar Board is forever! Over the course of the year you will guide your students through experiences that they will remember for the rest of their lives. Don't forget to help them understand the importance of keeping their Mortar Board connections after they graduate.

USEFUL RESOURCES

1. Dunkel, N.W. and Schuh, J.H. (1998). *Advising student groups and organizations*. San Francisco, CA: Jossey-Bass.
2. Local and national professional organizations supporting student affairs professionals and those working with student groups (*i.e.*, ACPA, ACUI, NACA) and literature from these organizations
3. Advisor training or information provided by your institution
4. The National Office—we are always ready and willing to support our chapter advisors

LEAD CERTIFICATION PROGRAM

Advisors are the guides on the side of every student organization; there is a tremendous need for strong advisors who exemplify the leadership traits that chapter leaders must exhibit to grow and strengthen their student organization or honor society on campus.

In a recent study, the American College Honor Societies (ACHS) found that the greatest challenge mentioned by member societies was advisors. Retaining advisors, building satisfactory advisory teams, acquisition of and support for advisors and maintaining good connections between advisors and university administrators were all opportunity areas.

Advisors need not “go it alone.” Mortar Board wants to show support for the important role of advising and help give advisors the tools to make their advising experience a rich and rewarding one.

Enter LEAD. Mortar Board has developed the Leadership Excellence and Advisor Development certification program to provide you with the tools and resources you need to:

- Effectively advise your collegiate chapter's leadership team
- Cultivate relationships among a diverse group of students; after all, Mortar Board is about networking and about building lasting relationships, something that distinguishes it from other organizations
- Enhance students' cocurricular education through many opportunities for teaching and interacting outside of the classroom
- Help chapter leaders apply their existing skills to the one-of-a-kind leadership situations that they face
- Enhance your own interpersonal assets to work best with millennial students
- Create and maintain a strong advisor team to help your chapter and balance your workload
- Understand best practices in student organization advisement with topics including fundraising, member motivation, conflict resolution and risk management

LEAD certification is with a credential that will be meaningful personally as well as in the workplace.



<http://www.mortarboard.org/LEAD/index.html>

FREQUENTLY ASKED QUESTIONS (FAQ)

What is my chapter's passcode/password?

Please contact the National Office at 800-989-6266 for your password.

How do I locate all of our members?

With hope, your predecessor left you that information. If not, you can always check to find members' information on the Official Membership Report and cross-reference these with campus address lists. Remember, you don't have to do this alone. As soon as possible, get a message to all members for the first meeting or maybe a social gathering to start off the year. If no one with your chapter seems to know the answer, you can call the National Office to help you access these records.

Who is my section coordinator and how can he or she help me?

Your section coordinator (SC) is a Mortar Board volunteer dedicated to helping your chapter succeed. A list of SCs and contact information is provided on page 29 of this handbook. Reach out to your SC throughout the year with questions, concerns or to share good news!

How do we find the Mortar Board alumni in our area?

Locating alumni will require a dedicated effort. The alumni chairperson information on page 22 of this handbook gives suggestions for finding alumni. The National Office is also able to complete ZIP code searches and provide you with the contact information of alumni either from your chapter or who live in your area (or both). Please contact the National Office by phone or email mortarboard@mortarboard.org with the ZIP codes for which you would like lists.

Does each chapter have to send someone to the conference?

Who should it be?

Attendance at the conference is essential not only for getting your chapter started in the right direction, but for determining the future of Mortar Board as the governing body. Each chapter is required to send one official chapter delegate in order to meet chapter minimum standards, and is welcome to send additional members for a small fee. The official delegate should be the chapter president or another chapter officer in her or his absence. If the chapter has not yet elected officers, a representative should still be sent.

How do I find out what my chapter's tax exempt status is?

All Mortar Board chapters are tax exempt from paying federal income tax. Most states accept this status and exempt chapters from state tax as well. If you need specific proof of your chapter's tax exempt status, including your federal tax ID number (EIN), please contact the National Office.

We know that our chapter is going to be late turning in a form, or we're going to miss a deadline. Should we still complete the form?

Yes! Mortar Board requires this information to fully evaluate the national organization. Some reports, like the Financial Report, are required for Mortar Board to maintain its federal tax status as a charitable organization. Reports, when received by the appropriate deadlines, are also used for award determination. One of the most valuable benefits of reports for either the chapter or the national

organization is that of historical information. The National Office retains these reports and can share them with a chapter when a chapter needs them.

We can't find a time to meet. What can I do?

Ideally the chapter members can find a day and time that will work for just about everyone. If they know and can plan on a meeting generally not lasting more than an hour, just about everyone can find the time. If you have a member who cannot meet then, see if there is a time that an officer or another member can meet with that person and fill them in. Maybe you can find a rotating schedule for the chapter, one meeting in the evening, the next at lunch. Try to encourage all to stay in communication with each other and have the chapter secretary send minutes to members (especially anyone who was absent).

How do you find an advisor?

Your campus may have a staff member whose job it is to work with student organizations. If so, approach that person first for suggestions. Next, talk to the student affairs or programming staff members about ideas. There are guidelines in the Mortar Board *Bylaws* concerning advisors, too. Generally, an advisor should be someone who is willing to give the time and energy needed for the chapter. If she or he is also an alumna or alumnus of Mortar Board, all the better!

Can I have a sample of ____?

The National Office provides templates and examples of many different documents that might be useful for your chapter. Visit the handbooks and guides portion of the Website to see all of Mortar Board's publications, many of which contain sample documents, or request templates by emailing mbforum@mortarboard.org.

Where can I find official governing documents or *Bylaws*?

All official governing documents are made available online at www.mortarboard.org/publications/GoverningDocuments.pdf.

Where can we find new programming and fundraising ideas?

Visit the chapter resources section on www.mortarboard.org to see extensive listings of programming information for a variety of chapter activities including service and fundraising. Additionally, you can refer to ideas in the "On Campus" section of the *Mortar Board Forum*. You may also contact the National Office staff for assistance.

We cannot seem to agree on a program. What now?

Who says you have to have any one program? Why not have several smaller programs? Members are generally very busy people, so participation in several programs with a smaller amount of time each (as opposed to one immense program that demands everyone's attendance for a large amount of time) may be a good idea. Try to be flexible. Each chapter is unique and cannot/will not/should not fit into any mold.

I don't understand the membership procedures. It all looks too complicated! Do I need to know all of this?

The Membership Selection Handbook, available online or by contacting the National Office, is a comprehensive document that covers everything you'll need to know about Mortar Board selection and membership. Although the area of membership is overseen by a specific officer, it is also one in which the entire chapter takes part, and all officers should be familiar with the procedures. The Chapter Action Plan is due on or before October 15

and serves as a planning guide for the chapter. The plan is reviewed to help you find strengths and weaknesses in your process and to help all chapters be as successful as possible in selection. Your chapter should also hold a practice selection meeting in order to familiarize everyone with the process.

How can we determine the upper 35 percent GPA of our junior class and establish our chapter's GPA standard?

In order to obtain the upper 35 percent of your junior class (the cut-off number your chapter should be using for membership), you need to contact the registrar at your college or university. This official is in charge of keeping all student records and should be able to release this number to you. While some schools will also assist you by giving you the names of all students who meet that GPA or even sending out emails on behalf of your chapter, some will not due to privacy laws. If you are having difficulty with your school releasing this number to you, please contact the National Office. Please note that Mortar Board's governing documents require that you use the GPA figure that represents the top 35 percent of the junior class or a 3.0 for your chapter GPA standard, whichever figure is *higher*.

How can we possibly consider for membership everyone who meets the academic standards? The numbers and costs are too great!

It is unrealistic to expect a chapter to bear the expense of a 1,000+ piece mailing. However, the chapter does have the responsibility to get the membership information distributed in the campus community. The key, however, is to begin the process early (before the winter break). Use of mass email to prospective candidates is free as are posters around main campus buildings. Use of free on-campus mail service is also sometimes possible. Call the registrar's office to see if they will send out an application on your behalf. Consider accepting nominations to assist with your decision-making process.

I am having problems with a report form. HELP!

If you encounter a problem while submitting your any report, please call the National Office at 800-989-6266 so that we may assist you.

We have a chapter member who never shows up or is not pulling her or his weight, and we feel it is unfair to our other chapter members who work very hard. What can we do?

It is unfortunate when any member of an organization chooses to not participate fully. First, try to talk with the member about why he or she is not participating. If your chapter cannot establish contact with the member or he or she does not have a valid excuse for not participating, and your chapter feels strongly enough about taking action, you have two options. First, you could ask the member to resign. Or, you could go through the process of removing the member from the chapter. Both of these policies are outlined in our *Bylaws*.

What is a Chapter Citation?

Chapter Citations are given to staff members on campus or people in the community whom a chapter wishes to honor for a specific reason. Often, these people have generously supported a chapter in some way. If you would like to present someone with a chapter citation, please contact the National Office.

What does it mean to have a "cleared account"? Why is it important?

The status of a "cleared account" means that a chapter has submitted required materials and all necessary fees, and is therefore in good standing nationally. It is vital for chapters to have cleared accounts in order to maintain their charter and ability to vote on important issues at the annual national conference.

What is the conference fee?

Each chapter is required to pay the conference fee, which is \$250. The fee, announced each year six months prior to the conference, helps defray a portion of the annual Mortar Board National Conference expenses. This fee, along with donations, partnerships and support from the Mortar Board National Foundation cover transportation, meal, hotel and programming costs for one official delegate from each chapter. The fee covers less than half of the total expenses associated with sending a member to the conference.

Don't see your answer here? Contact the Mortar Board National Office by phone at 800-989-6266 or by email at mortarboard@mortarboard.org.

ABOUT MORTAR BOARD'S NATIONAL STRUCTURE

Leadership from the students

Mortar Board is unique in that the active student members participate in its governance. Active members annually attend the national conference, with one delegate from each collegiate chapter serving as a voting member of the Society, a responsibility restricted to active student members. These voting delegates determine the national dues and direct the organization, as well as elect the National Council from the ranks of Mortar Board's alumni and collegiate members. The structure of Mortar Board, its purposes and *Bylaws* are reviewed annually at the national conference.

National Office

The national headquarters for Mortar Board is located in Columbus, Ohio. The National Office is the source of records and information related to membership, chapter operations, national conferences, alumni, the Mortar Board National Foundation and the historical archives of Mortar Board. The professional staff carries out the policies established by the governing body, provides chapter support, answers questions regarding membership and alumni, approves selected candidates to become members before they are tapped, and provides valuable resources for chapter and alumni programs.

National Council

The National Council, elected by collegiate delegates, is charged with planning the long-term future of the organization. It establishes policies for national operations, appoints section coordinators to serve as liaisons to specified regional areas and serves as the governing body between national conferences.

National Council members volunteer to serve a two-year term (with a maximum of two consecutive terms in any one office, with the positions of president, president-elect and student representative being limited to one term). The National Council is made up of ten members: a president, president-elect, vice president, secretary-treasurer, two alumni representatives and two student representatives.

Mortar Board National Foundation

The National Foundation was established in 1955 as the Society's fundraising arm and to serve the educational aims of Mortar Board. Its mission is to support Mortar Board, Inc. in furthering its ideals of scholarship, leadership and service. Its primary goals are to provide fellowships to Mortar Board members pursuing graduate and professional degrees, grant funds to collegiate chapters for special projects that will enhance their contributions to their campus and community, and raise funds to support leadership and service initiatives through grants to Mortar Board.

A board of trustees governs the National Foundation. The trustees are volunteers who coordinate the fundraising efforts in collaboration with the staff at the National Office, oversee the investment of the funds and administer the fellowships, chapter project grants and other programs. Fundraising sources include contributions from Mortar Board members, alumni and chapters,

along with royalties and donations from corporate partnerships.

Section coordinators

Section coordinators volunteer to work directly with chapters, serving as close primary contacts for chapters within a specified geographic region.

Each section coordinator is available to assist specified chapters with a variety of tasks, including the completion of forms and execution of events. Section coordinators communicate, facilitate and establish continuity within the Society.

Each chapter belongs to a numbered section, listed below. Section coordinators are appointed by the National Council.

MORTAR BOARD SECTIONS

Section 1 (Diana Smithens, section1@mortarboard.org)

The University of Connecticut, Cornell University, Endicott College, The State University of New York at Buffalo, The University of Vermont, Western New England College

Section 2 (Katie Chick, section2@mortarboard.org)

Bucknell University, Carnegie Mellon University, Chatham University, University of Delaware, Duquesne University, Grove City College, Hood College, Indiana University of Pennsylvania, University of Maryland, The University of Pennsylvania, The Pennsylvania State University, University of Pittsburgh, Rowan University, Westminster College, West Virginia University, West Virginia Wesleyan College

Section 3 (Molly-Armine Holston, section3@mortarboard.org)

James Madison University, Longwood University, University of Mary Washington, University of Richmond, College of William and Mary

Section 4 (Sonja Ardoin, section4@mortarboard.org)

Clemson University, Converse College, Lenoir-Rhyne University, Queens University of Charlotte, Salem College, University of South Carolina, Wake Forest University, Western Carolina University

Section 5 (Michelle Dahnke, section5@mortarboard.org)

University of Florida, Florida State University, The University of Miami, University of South Florida

Section 6 (Glenda Guyton, section6@mortarboard.org)

Agnes Scott College, University of Alabama, Auburn University, Birmingham-Southern College, Emory University, University of South Alabama, Troy University, Wesleyan College

Section 7 (Rishi Kumar, section7@mortarboard.org)

Louisiana State University, University of Louisiana at Monroe, Mississippi College, Mississippi State University, University of Mississippi, Mississippi University for Women, Tulane University

Sections 8 and 9 (Jessica Heath Geist, section8-9@mortarboard.org)

Section 8: Carson-Newman College, Rhodes College, University of Tennessee at Chattanooga, University of Tennessee at Knoxville, Tennessee Tech University, Vanderbilt University
Section 9: Berea College, Eastern Kentucky University, University of Louisville

Sections 10 and 11 (Laura Bockbrader, section10-11@mortarboard.org)

Section 10: University of Cincinnati, Denison University, Miami

University, Ohio University, The Ohio State University, Ohio Wesleyan University, Otterbein College, Wittenberg University, Xavier University
Section 11: The University of Akron, Bowling Green State University, Case Western Reserve University, The University of Findlay, Kent State University, Lake Erie University, Ohio Northern University, The University of Toledo

Section 12 (Sarra Nazem, section12@mortarboard.org)

Adrian College, Albion College, Central Michigan University, Hope College, The University of Michigan, Michigan State University, Northern Michigan University

Section 13 (Beth Geryak, section13@mortarboard.org)

Ball State University, Butler University, Depauw University, University of Evansville, Hanover College, Indiana State University, Indiana University, Purdue University, Valparaiso University

Section 14 (Julie Edmunds, section14@mortarboard.org)

Augustana College, Bradley University, Eastern Illinois University, University of Illinois, Illinois State University, Illinois Wesleyan University, Knox College, MacMurray College, Monmouth College, Northern Illinois University, Northwestern University, Western Illinois University

Section 15 (Brian Bock, section15@mortarboard.org)

Beloit College, Lakeland College, Lawrence University, University of Wisconsin at Eau Claire, University of Minnesota - Twin Cities, University of Minnesota - Duluth, University of Wisconsin at Milwaukee, Carleton College

Section 16 (Kristi Okerlund, section16@mortarboard.org)

Coe College, Cornell College, Drake University, Grinnell College, The University of Iowa, Iowa State University, University of Nebraska at Kearney, University of Nebraska at Lincoln, University of North Dakota, North Dakota State University, The University of South Dakota, South Dakota State University

Section 17 (Victoria Luhrs, section17@mortarboard.org)

Fort Hays State University, The University of Kansas, Kansas State University, Northwest Missouri State University, University of Missouri at Columbia, University of Missouri at Kansas City, Stephens College, Washburn University, Washington University, Wichita State University, William Jewell College

Section 18 (Angie Schrader, section18@mortarboard.org)

University of Arkansas, University of Central Oklahoma, Drury University, Lyon College, The University of Oklahoma, Oklahoma Baptist University, Oklahoma State University, Southern Nazarene University, The University of Tulsa

Sections 19 and 20 (Joseph Rodriguez, section19-20@mortarboard.org)

Section 19: Midwestern State University, University of North Texas, Southern Methodist University, Texas Christian University, Texas Tech University, Texas Wesleyan University, West Texas A & M University
Section 20: Baylor University, The University of Texas at Austin, The University of Texas at San Antonio, Trinity University

Section 21 (Angie Schrader, section21@mortarboard.org)

University of Arizona, Embry-Riddle Aeronautical University, The University of New Mexico, Northern Arizona University, The University of Texas at El Paso

Section 22 (Dave Whitman, section22@mortarboard.org)

Colorado College, University of Colorado, Colorado State University, The University of Denver, The University of Northern

Colorado, University of Utah, The University of Wyoming

Section 23 and 24 (Katie Verschelden, section23-24@mortarboard.org)

Section 23: Idaho State University, University of Montana, Montana State University, Washington State University
Section 24: University of Oregon, Oregon State University, University of Puget Sound, Seattle Pacific University, University of Washington, Willamette University

Section 25 (Mohammed Hill, section25@mortarboard.org)

University of California at Berkeley, University of California at Los Angeles, University of California at Santa Barbara, California Polytechnic State University, California State University Channel Islands, Chapman University, University of Hawaii, Occidental College, University of the Pacific, Pomona College, University of Redlands, University of San Diego, San Diego State University, University of Southern California

NATIONAL OFFICE SERVICES

The Mortar Board National Office staff is here to help with anything you may need. Inquire about services by phone at 800-989-6266 or email at mortarboard@mortarboard.org. Some services offered are:

- Templates for chapter projects
- Design services for chapter T-shirts, posters or other novelties
- Programming resources and ideas
- Official Mortar Board logo in electronic format (available online at www.mortarboard.org or by email request to mbforum@mortarboard.org)
- Membership materials (pins, certificates, membership booklets)
- Free general Mortar Board brochures
- Area chapter/alumni lists
- Handbooks and guides
- Scholarship search engine
- Official Mortar Board training video on DVD
- Merchandise such as honor cords, medallions, gift items, T-shirts and more
- Recognition certificates
- Complimentary business card designs for chapters, individual members and advisors
- Personalized press releases announcing membership to be sent to the member's hometown newspaper(s) and any organizations of their choice

MODEL YEAR IN MORTAR BOARD

AND, MAKING AN ENCORE APPEARANCE: CHAPTER DEADLINES

October 15

- Chapter Action Plan (formerly the Chapter Planning Calendar and Membership Recruitment and Selection Plan)
- Chapter Project Grant application 1
- Forum submissions

November 15

- Alumni award nominations

December 15

- Mortar Board Week Visibility Grant application

January 31

- Mortar Board Fellowship application

March 15

- Excellence in Advising Award nominations:
- Conference registration opens
- Conference Assistant application
- Forum submissions

May 15

- Chapter Annual Report
- Chapter Finance Form
- Advisor Annual Report
- Final Official Membership Report (OMR)
- Historian Annual Report
- All fees due
- Officer Address Information Form
- Annual chapter award nominations
- Chapter Project Grant application 2
- Conference registration closes

TYPICAL CHAPTER YEAR*

Summer - Fall

- Chapter president attends the annual Mortar Board National Conference July 20 - 22, 2012, in Chicago, Ill.
- Begin general membership meetings (held at least monthly) and officer meetings once school begins in the fall
- Plan early for all scholarship, leadership, service and fundraising projects that will occur throughout the school year
- Participate in fall campus activities
- Create a plan for membership selection
- Meet all fall deadlines

After winter break

- Begin the membership selection process
- Celebrate national Mortar Board Week February 12 - 18, 2012
- Participate in winter campus activities
- Complete the Official Membership Report (OMR) for the National Office
- Tap new members
- Hold orientation for new members, and transition sessions for new officers
- Initiate new members
- Participate in spring campus activities
- Meet all winter and spring deadlines

*Please note the typical year may vary from one campus to the next.

TALK TO US

Communication with the Mortar Board National Office is essential! Many Mortar Board chapters have strong local traditions and obligations to fulfill. At the same time, each chapter is a member of a large, national organization. In order for us to continue to grow and improve as an honor society, we need your help.

Following the timelines and suggestions in this handbook will help you maintain great connections with the National Office. Remember these key tips:

Tips for communication success

- **Make sure all chapter members realize they are a part of a national organization.** Surprisingly, some candidates do not realize that Mortar Board is a national organization with thousands of members and dozens of resources.
- **Know the "chain of help."** Each chapter is given a section coordinator to serve as their go-to resource for everything Mortar Board. These volunteers have years of experience with Mortar Board, and can help solve most problems. If you are unable to reach your section coordinator or are looking for a copy of an important national document, National Office staff members may be able to promptly provide assistance.
- **Share your accomplishments by submitting articles to the *Mortar Board Forum*, applying for national awards or simply by sending an email.** The National Office loves to hear how chapters are doing, and we enjoy honoring these achievements with awards.
- **Pay close attention to reports and important dates and submit all completed reports on time.** The deadlines are repeated frequently throughout this book.
- **Be sure that you fully understand the fee structure and monitor payment of chapter and membership fees.** Each new member must pay a national membership fee. Additionally, many chapters charge a small fee for local dues. Finally, every chapter is required to pay a minimal fee to cover the national conference expenses. All of these fees should be submitted to the National Office immediately after initiation, and no later than May 15.
- **Know how to contact Mortar Board.** Contact information for Mortar Board's national leaders is listed throughout this guide.
- **Find our social media communities** to find out what is happening in Mortar Board on the national level.



<http://blog.mortarboard.org>
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