

# Mortar Board Chapter Leader Checklist<sup>®</sup>



## Important chapter dates to schedule NOW

- First executive board meeting, meeting of individual committees and general membership meeting  
*(Tip: at the first meeting, have members bring their class and work schedules and schedule all meetings for the upcoming year – the entire year if possible)*
- First chapter meeting  
*(Be sure to share conference information with your chapter advisor and all chapter members!)*
- Advisor meeting
- Selection training session and official selection meeting
- Approval to tap received from National Office
- Tapping
- New member orientation
- New member initiation
- New officer election
- New member chapter and officer transition
- All existing chapter traditions
- Mortar Board Week events *(Week containing February 15)*

## Important deadlines for your chapter to meet

### Required chapter reports:

*Each of these forms must be completed by the deadline for your chapter to remain in good standing nationally and be eligible for national awards.*

- Chapter Action Plan - October 15 (Person responsible: *president and membership chair*)
- Official Membership Report (OMR) – two weeks **BEFORE** tapping! (*membership chair and president*)
- Final OMR and all fees, including conference fee – immediately after initiation but no later than May 15  
*(membership chair, president and treasurer)*
- Chapter Finance Report - May 15 (*treasurer*)
- Chapter Annual Report - May 15 (*president*)
- Advisor Annual Report - May 15 (*advisor*)
- National Conference registration - May 15 (*president*)
- New Officer Report Form - May 15 (*president*)

### Optional chapter opportunities:

- Chapter Project Grant application - October 15 (*president or treasurer*)
- Alumni Award Nomination form - November 15 (*any member*)
- Mortar Board National Fellowship application - January 31 (*any member*)
- Excellence in Advising Nomination form - March 15 (*any member*)
- Golden Torch Award Nomination form - May 15 (*president or advisor*)
- Project Excellence Award Nomination form - May 15 (*president or advisor*)
- Most Improved Chapter Award Nomination form - May 15 (*president or advisor*)
- Winter Mortar Board Forum Submissions - December 1 (*director of communications or secretary*)
- Spring Mortar Board Forum Submissions - April 1 (*director of communications or secretary*)
- Spring/Summer Mortar Board Forum Submissions - August 15 (*director of communications or secretary*)