

# MEMBERSHIP SELECTION HANDBOOK

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## **A MESSAGE FROM THE EXECUTIVE DIRECTOR**

Selecting new members of Mortar Board is the most important internal activity of your chapter. You are the only ones who can select candidates to carry on the honor of Mortar Board membership on your campus.

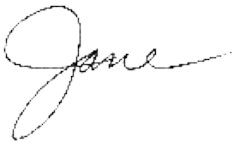
However, your candidates are not members until Mortar Board, Inc. approves them! The Candidate Request (CR) is extremely important. I can't emphasize it enough.

Once your selection meeting has ended and no later than two weeks before tapping, you must complete your CR and send it to the National Office for review and approval.

Approval comes within two weeks of submission. Be sure to provide the National Office adequate approval time. Then and only then may you tap your candidates. Please recognize the importance of your CR and filing it in a timely way.

Thank you for giving your chapter's selection of new members the attention and importance it deserves.

Yours in leadership,



Jane A. Hamblin, J.D., CAE, COA  
Executive Director

## **NATIONAL REQUIREMENTS FOR MEMBERSHIP**

Please go over these requirements each year and make sure you and the entire chapter understand them.

**Academic requirements for membership.** To be considered for membership a candidate must:

- be in good standing and enrolled at the institution;
- be in her or his junior year or hold equivalent status in units or hours depending on the institution's prolonged or accelerated curriculum for a particular academic program;
- intend to graduate no sooner than one academic term, summer not included, following initiation; and
- hold a grade point average that places her or him in the upper 35% of the student body with junior standing or at least a B average, whichever is higher.

**Ideals.** A candidate meeting the academic requirements for membership may be considered for selection to membership based on distinguished ability and achievement in scholarship, leadership and service.

**Number your chapter may select.** Each year your chapter must select the right number of members for the honor of membership in Mortar Board and to carry out the work of Mortar Board.

- You may select no more than 50 members or 1.5% of the student body with junior standing, whichever is greater. You may select no fewer than 15 members or 10% of the student body with junior standing, whichever is fewer.
- Chapters should aim to select more than their minimum selection target (MST). MST can be provided by the National Office or your section coordinator.

## **MEMBERSHIP SELECTION**

The selection of new members is the most important privilege and responsibility of a Mortar Board chapter. To manage selection well, planning is necessary. Time is not your enemy – a lack of time caused by a lack of early planning is!

This handbook is designed to guide you through each step of the membership selection process.

- Share the first few pages of this handbook with your chapter. It will help them understand Mortar Board's unique selection process.
- Use this guide as you plan your selection.
- Find this information and supplemental materials such as an initiation script, Mortar Board logos and templates at [www.mortarboard.org/collegiate/membershipselection/](http://www.mortarboard.org/collegiate/membershipselection/)

Please contact the National Office with any questions or concerns you have about membership selection.

## **MORTAR BOARD'S UNIQUE SELECTION**

Selection of members to Mortar Board is unlike that of any other organization to which you belong.

- First, your chapter must obtain approval of its selection process in the fall from your section coordinator.
- The actual selection is held in one confidential meeting with all chapter members present in the winter or second term. Selection takes place just once a year.
- Only those students with junior standing who have demonstrated academic achievement may be considered in this meeting.
- Your chapter makes all faculty, staff, and eligible students aware that nominations and applications are welcomed.
- Membership is selective. A candidate must meet all selection criteria by achievement, not potential.
- Your chapter must gain approval of its candidates from the Mortar Board National Office before tapping them.

## **SELECTION P-E-R-F-E-C-T-I-O-N**

There are seven steps that every Mortar Board chapter follows to have selection success. You could say that these steps make for a P-E-R-F-E-C-T selection. Understand and implement these steps. Start early in the fall so you have plenty of time to achieve selection perfection.

### **1. Plan**

- Read this booklet.
- Think about it.
- Figure out what selection method you will use and sketch a timeline for your chapter's process.
- Review your chapter files from previous years.
- Talk with your Mortar Board chapter advisors about how things have been done in the past and how improvements could be made.
- Complete the Chapter Action Plan (CAP) on or before September 15.
- Engage your executive committee and your advisors as you complete the form. Secure their buy-in.
- Describe the draft of your plan confidentially with all chapter members at a couple of meetings early in the fall.
- Engage the National Office in answering your questions.
- Share the plan with your chapter's members in a meeting.

## 2. Engage

Mortar Board membership is something about which you and your chapter members share great pride. After all, membership in Mortar Board, the premier national college senior honor society, is a signal honor. Everyone in your chapter comes from a slightly different frame of reference, so engage everyone in a discussion about the significance of membership.

At the start of the autumn term, reorient the chapter to significant points in the *Member Guide*. Talk about the benefits of membership and your chapter's history. Let your advisors provide historical context about the chapter's success. Hold chapterwide conversations about the purpose of Mortar Board.

These kinds of discussions build an important foundation for the entire chapter to understand how important selection is and what it means to be selective. Actively engaged members will contribute to the success of the selection process.

## 3. Reach Out

Your chapter must establish a pool of qualified students of junior standing from whom to select. This pool doesn't develop on its own. Whether your chapter conducts a recruitment or a nomination process, and even if hundreds or thousands of students may be eligible, you must dedicate effort every year to ensure that everyone on campus—ALL students, faculty and staff—are aware of Mortar Board and the selection process.

Nearly all Mortar Board chapters obtain a list of eligible students from their registrar's office at the end of the autumn term. Occasionally a chapter will make the mistake of informing only these eligible juniors of the possibility of membership in Mortar Board. That is limiting! Instead, all student organizations, faculty, staff and eligible students should be made aware of your chapter's desire to receive nominations, applications, or both. So, reach out far and wide so that you get the deepest pool of students from whom to select. Set a goal that you will increase the number of those seriously considered by 10% over the previous year. Your advisor can help you determine this number.

Here are a few other ideas that are used by successful chapters:

- Download the brochure developed by the National Office.
- Order up to 200 free brochures.
- Place members at information tables in key locations.
- Distribute handbills at key events and locations on campus.
- Create fliers to post and distribute campuswide.
- Write a guest editorial in your campus newspaper.
- Conduct informational meetings for prospective members.
- Have members talk about Mortar Board at other meetings.
- Send letters to departments asking for nominations.
- Meet with faculty and staff to encourage nominations.
- Encourage departments to explain Mortar Board to faculty.
- Place information in faculty-staff newsletters.
- Place information on your school's website.
- Place banner ads on appropriate campus websites.
- Ask for listing to be sent out on departmental listservs.
- Create signs for campus buses.
- Chalk sidewalks.
- Send letters to staff who work with student leaders.
- Encourage self nominations from junior award winners.
- Post on social media.

Keep in mind that your chapter should maintain a comprehensive presence on campus throughout the year. This will be the single most important factor in the success of selection.

**Encouraging diversity.** Diversity and multiple perspectives are two of the great strengths of Mortar Board and have encouraged chapters to formulate a nondiscriminatory and unbiased selection process. Chapters are encouraged to promote diversity in selecting new members: Program throughout the year in ways that reflect diversity and enhance your ability to recruit a diverse group of new members in the spring.

- Notify all prospective candidates of their eligibility for membership even if their GPA is borderline. If your chapter budget does not allow for a mass mailing, use a variety of alternative publicity methods. This can be accomplished by using email to contact all juniors or seniors with another year on campus (even if they are off campus studying abroad, interning, commuting or looking after family members).
- Personally speak to eligible candidates.
- Request nominations from faculty members, academic advisors, advisors to student organizations and others who have frequent contact with potential candidates.
- Do not limit consideration for membership only to candidates who return applications or other forms. Reach out.
- Personally visit a wide variety of groups on campus and cosponsor events with different cultural or theme-related organizations; and especially encourage them to nominate their members for Mortar Board membership.

## 4. Formulate

Long before the actual date of your selection meeting, help your chapter formulate its thoughts about the type of member who is distinguished enough to be selected to Mortar Board. In January, at the latest, the chapter should develop a sense of what distinctive accomplishments will qualify candidates for membership. Your chapter must select based on Mortar Board's requirement of "distinguished ability and achievement in scholarship, leadership and service."

Talk about what kinds of new members should be in the next class that you select. Ask members to consider the importance of a diverse set of new members who represent all majors, all ethnicities, all races, cultures, religions, many types of student organizations, a wide variety of living situations, and a wide range of ages. Yes, nontraditional students want to be Mortar Boards too! What parts of campus have not been represented in the past? While you are having this discussion with the chapter, remember, as tempting as it may be, no names may be discussed until the actual selection meeting. Always avoid making comparisons between potential members and current members.

**Scholarship.** A chapterwide discussion of scholarship should be aimed at examining qualities of scholarship beyond GPA. There is a qualifying average that is required nationally, **but grades alone do not represent the quality or depth of a candidate's scholarship.**

- Is there a real intellectual curiosity and interest in ideas?
- Does the candidate take classes outside her or his major?
- Does the candidate actively support academic programs?
- Do attitudes of scholarship extend beyond the classroom?
- Has the candidate attended scholarly conferences?
- Has the candidate published any research papers or worked with professors on research or independently?
- Has the candidate gone above and beyond what is required and committed to university honors?
- Has the candidate pursued study abroad opportunities, interdisciplinary majors, double majors, or minors?

**Leadership.** Discuss with the chapter the distinction between office-holding and leadership. Mortar Board expects your chapter to look beyond leadership in a few prestigious activities and to seek out those in other leadership areas that are not so evident on the campus or in the community. Insight might be gained by answering these questions:

- Does the candidate offer an example for others by displaying humility in leadership?
- Is the candidate sincere in the cause that she or he leads?
- Does the candidate demonstrate loyalty and trustworthiness to the causes she or he leads?
- Does the candidate follow through on promises?
- Does the candidate effectively use the talents of others to enhance the leadership experience of the group?
- Does the candidate share the credit for achievement?
- Is the candidate recognized as a capable leader?
- Is the candidate able to question actions objectively?

**Service.** The desire to serve is laudable and can be hard to judge. One chapter defines service as “cooperation, generosity and responsibility.” The following questions may help in your chapter’s discussion of the Ideal of service:

- Does the candidate serve with character and integrity?
- Does the candidate seek out jobs that need doing, whether or not doing so will gain publicity or notoriety?
- Does the candidate follow through on things?
- Is the candidate sensitive to the needs of the campus?
- Does the candidate demonstrate a positive attitude?

**Selecting based on these Ideals.** A candidate must meet the three Ideals of scholarship, leadership and service qualitatively and quantitatively. The quantitative judgments will be a matter of record. During the selection meeting, members will accept many of the qualitative judgments from others who should know. Their decisions will be based on fair assessment of the campus and candidate. Impartial, unprejudiced decisions are called for, with full awareness of the honor the chapter is about to confer and the good the new members will bring to campus.

## 5. Elect

Declare a date for selection and give members and your advisors several months’ notice so they can arrange their schedules and attend this very important, and often lengthy, meeting. Make sure you allot enough time and inform members of this well in advance. Provide a private, secure location for members to review all candidate information in advance of the meeting so that they can “do their homework” before selection begins. Remember, privacy of this information is of the utmost importance. Members may not share the names of candidates with anyone before or after selection. Plan a comfortable location with suitable accommodations. Provide adequate refreshments and, while ballots are being counted, entertainment or other energizing activities.

Make every attempt to ensure a fair and just selection process based on candidates’ achievement, not potential. At the selection meeting, election of new members should be the only topic of business. The chapter president calls the meeting to order as a normal chapter meeting. Roll should be called. Minutes are not kept in the traditional sense, but a record of the candidates selected is carefully maintained by the advisors. A chapter advisor must be present for the entire selection meeting lest the process will be invalidated by the National Office. The president or selection chair must read the following out loud:

**National Principles to be Read Aloud:** This process begins our chapter’s one-and-only selection meeting. Please allow me to read these basic rules for conduct of our meeting.

- Selection of new members is a privilege. Only our chapter, at this time, may honor outstanding leaders and accord them with the distinction of membership in Mortar Board on our campus.
- Once selection has begun, all members must make every effort to remain here until the end.
- No proxy votes may be accepted.
- Candidates should be selected from all backgrounds, majors, experience and ages.
- No candidate may be discriminated against based on race, ethnicity, creed, age, sex, affiliation, marital status, sexual orientation, physical challenge, gender expression, or any other affiliation or protected class (From the *Bylaws of Mortar Board Inc.*)
- The selection process is confidential. Nothing from any selection discussion may leave the room. No member or advisor may share the results of the selection with anyone outside of the room, provide anyone with feedback, or even imply the results of the selection with anyone.
- A member may not text about selection at any time before, during or after. The use of social media to talk about this meeting or what is going on is prohibited. Please respect the secrecy and integrity of this process.
- Comments made about a candidate should relate to achieved scholarship, leadership and service. Each member should make every effort to make comments positive and constructive so that they follow the chapter’s prearranged expectations of what constitutes a candidate who is “selected for distinguished scholarship, leadership and service.” Potential is not equal to achievement.
- Members must refrain from comparing a candidate to a current member or another candidate. Each candidate should stand on her or his own accomplishments alone.
- Courtesy rules all discussion. Choose silence rather than make irrelevant or distracting commentary. Appreciate that there will be disagreement. If in favor of a candidate, state your case about the candidate positively. If not in favor, let your silence indicate this. Listen to the comments of others, even if you think you disagree.
- It is perfectly acceptable to bring up for consideration grade-eligible candidates who may not have applied or been nominated. The goal of selection is to consider every eligible candidate, not just those who applied. These candidates may be brought up at any time until the time that selection is complete.
- Our advisors are with us as guides and must be present throughout the process, but may not speak for or against any candidate. If any member has a special concern or problem, please speak with our advisor first to discuss a plan of action.
- A unanimous vote may not be required. The percentage needed to select may not be adjusted once selection starts.
- Once elected to membership, a candidate may not be reconsidered.
- No candidate may be tapped until approved by the Mortar Board National Office. The chapter will seek approval immediately after the selection meeting following Mortar Board’s prescribed methods.
- Tapping or informing of approved candidates must follow the plan approved in advance by the chapter. Please keep all tapping information private to provide our new members with the most enjoyment possible from the surprise.

## 6. Check

Be sure that all materials from your meeting are collected from the members before they leave the selection meeting. It is usual for the advisor to take these materials and destroy them appropriately. As members depart the meeting, remind them of the necessity of retaining the confidentiality of the proceedings. Be sure to discuss the plans for tapping and go over the chapter's busy calendar, including orientation of new members and initiation and, of course, graduation festivities. Immediately after the selection meeting, your chapter must supply the Mortar Board National Office, through a completed Candidate Request (CR), with the names and qualifications of the candidates and secure the National Office's approval to tap the candidates. When the National Office approves the chapter's candidates, you may begin tapping candidates. Please allow two weeks for your CR to be reviewed by the National Office and also supply an accurate and complete CR. Following this, the National Office will send you a package containing initiation certificates, membership pins, and other materials that you will use for orienting and initiating your new members. If no CR is submitted to the National Office no package will be sent.

Your chapter may want to consider ordering graduation regalia (medallions, stoles and cords) for outgoing members around this time. Regalia cost will fall on the chapter or individual. Many chapters will ceremonially present regalia to graduating chapter members who have met participation standards at the initiation ceremony of incoming members.

## 7. Tap

Tapping of new members should always be done in person, unless this is physically impossible because of the candidate's absence from campus. Please refer to the section on tapping. Honorary members should be tapped as well. Please refer to the section on tapping.

## SELECTION MODELS

Selecting a new Mortar Board class is an important and serious, yet exciting, task. Your chapter must consider how to identify viable new members, how to get the word out on campus and how to collect applications and nominations. After all of this is done, you will finally be able to hold your selection meeting. At this meeting, be thorough in your process, as there is a lot to consider. Remember that Mortar Board prides itself on being selective, but not exclusive. Focus on recognizing students for their distinguished scholarship, leadership and service, not just popularity. All chapter members must be involved in this process to ensure selection success.

### Selection by Consensus model (preferred)

The Selection by Consensus model involves several rounds of voting and requires candidates to be approved by at least 80% of the chapter. It is the method used by most chapters.

**Round One.** Round one begins with a thorough review of every candidate who has been nominated or applied for membership. Read each name and invite a review of the candidate's scholarship, leadership and service. Members may provide only explanatory commentary (for example, a member might explain what a particular organization does if other members are unfamiliar, or describe a particular award as explanation). Members take personal notes on each candidate. After the review of each candidate, a vote is taken on a printed or electronic ballot. Each member may vote for no fewer than 15 (or 10% of the student

body with junior standing, whichever is fewer) and no more than 50 (or 1.5% of the student body with junior standing, whichever is greater). After the round is completed, all candidates receiving at least 80% approval are considered selected for membership, and their names will be submitted to the National Office.

**Round Two.** After the counting of the ballots in Round One, the president announces the names of those candidates selected for membership. Their names are removed from the ballot and further discussion. Round Two begins with the reading of the name of each remaining candidate. A chapter member who wishes to advocate for a candidate may speak in support or even simply describe an important aspect of the candidate's credentials. If no member wishes to speak about a candidate, the leader of the selection moves on to the next name without commenting until all have been read a second time. When this is done, a second round of voting is conducted. The maximum number of candidates that the chapter members may vote for is reduced by the number of those already selected (see "By the Numbers" below). The minimum number is reduced by the number already selected, unless 15 or more were selected on the first ballot, in which case the minimum is met.

**Round Three and Successive Rounds.** After the counting of the ballots in Round Two, the president announces the names of those candidates selected for membership. Their names are removed from the ballot and further discussion. Round Three begins with a third reading of each candidate's name. Members who wish to speak in favor of a candidate or highlight a candidate's accomplishments may do so. The leader of the discussion should be careful to make sure that each candidate's name is read. Following the completion of reading of names, conduct a third ballot with the maximum and minimum reduced by the total number already selected. After the ballots are counted, the president announces the names of those candidates selected for membership. Their names are removed from discussion. Round Four and successive rounds begin with a reading of each remaining candidate's name again or a page-by-page review of remaining candidates.

**Conclusion of balloting.** Balloting ends when the maximum number the chapter may select is reached or after the chapter has three "dry" ballots. A dry ballot is one in which no candidate receives the 80% required to select.

### Masked selection (used rarely)

A masked selection process may work well for a few chapters, yet it does not serve the interest of others. Masked selection may eliminate personal bias and allow a candidate to be judged solely on the information contained in her or his

**By the Numbers.** Assume your chapter maximum size is 50 and minimum size is 15. On the first ballot, members must vote for at least 15 and no more than 50. After the Round One ballots are counted, nine candidates are selected. Their names are removed from the printed ballot. On the second ballot, members can vote for no more than 41 [50 minus 9 = 41] and no fewer than 6 [15 minus 9 = 6]. After the second ballot, the chapter selected 11 additional candidates. Members may vote for no more than 30 [41 minus 11 = 30] and as few as desired because the 20 have been selected and the minimum has been met. This continues through three consecutive "dry" ballots.

application. However, masked selection can also give undue advantage to a student who excels at representing herself or himself on paper. Also, a chapter cannot know which candidates have not been considered unless they know which candidates HAVE been considered, so a masked selection process negates the effectiveness of a nominations process.

## **GENERAL INFORMATION**

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### **Nominations**

Nominations are quite an elegant way to include the entire campus (and even the community) in naming candidates for consideration for membership in Mortar Board.

One big difference between operating on the nominations process is that year-in and year-out, faculty and staff members on campus become acquainted with the “ritual” of nominating their select students as candidates for Mortar Board. With the application process, a chapter has to inform a new set of people every year. Faculty and staff probably have better access to their nominees’ GPAs (or at least would come close!), so you usually will get accurate information there.

Nominations are invited by sending a web link to a nomination form to deans, directors and department chairs; the presidents and advisors of all student organizations; as well as nominators from previous years. Be sure that you send a courtesy email or letter to all student affairs officials, especially the chief student affairs officer and the president of your institution. Allow plenty of lead time — at least eight weeks, and send reminders. You will be impressed how the number of nominations grows over time — that is, the first year you will probably have fewer than the second year, and so on.

What if someone “flies under the radar” of all nominators? You should always allow for self-nomination. There might be a student who is very worthy of consideration for Mortar Board but is not known well.

After every approved candidate has been tapped, and tapping has ended, be sure to send a list of new Mortar Board members to all nominators along with the chapter’s sincere thanks for their participation in the nomination process.

### **Length of time for selection**

The selection process can be time-consuming. Be as efficient as possible by being organized and determined. Consider a practice session with all of your members before the actual selection meeting, and be sure that all members have read all applications and nominations up for consideration prior to the meeting. Your chapter may have only one selection meeting.

In addition to being organized, be prepared for these considerations:

- Make sure members understand all rules of selection.
- In advance, stipulate a cap on the amount of time allowed for discussion of each candidate.
- Request members table discussion of controversial candidates.
- Emphasize that everyone does not need to voice an opinion about every candidate.
- Maintain fairness throughout the process so that every candidate is treated equally. Reviewing candidates in reverse alphabetical order in round three or four can be useful to this end. Taking a break for five minutes may help everyone refresh and refocus.
- Strive to meet your maximum membership number.

### **Membership Committee**

Many chapters organize a membership committee to spearhead their selection process. To begin the planning process, inform your chapter of how membership selection occurs, from gathering candidates’ information to orienting the new members. Walk the chapter step-by-step through the process; this will help keep everyone informed and will help to create an interest in the membership selection process. The committee will need to create a timeline and action plan for garnering interest among potential members, organize the application process, coordinate the tapping of each new member, and plan the initiation ceremony.

The membership committee should be unbiased and dedicated to selecting a strong new chapter. You may choose to appoint the membership selection committee randomly in order to accomplish this purpose. It is recommended that the committee be composed of 10% of your chapter.

In addition to coordinating the overall membership selection process, the membership committee should help ensure that selection meetings, initiation and orientation for new members are mandatory events for everyone in your chapter. Remember, while the committee is the coordinating body for selection, led by the chapter’s membership chair, each and every chapter member must be involved in the selection of the new class.

## **CHAPTER ACTION PLAN (CAP)**

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Each chapter must submit a Chapter Action Plan (CAP) to the National Office on or before September 15. This allows the National Office to maintain the integrity of the Mortar Board selection process nationwide and offer suggestions to chapters as needed. Use the Membership Selection Timeline as a resource when completing the dates in your CAP. Although your school may not be on a traditional semester system, it is important to both complete the CAP before the September 15 deadline and to keep the guidelines for tapping and initiation in mind. If you need help with your CAP, contact your section coordinator or the National Office.

### **Special membership considerations**

Your chapter will likely come across some special situations when dealing with membership selection. Here are some guidelines for how to handle the most common situations.

**Students abroad or away from campus.** Remember to inform students studying away from campus about Mortar Board. This group can be defined as students verified by the institution for study abroad or for study at another institution in the United States (verification is a statement from the registrar’s office stating that a particular student is officially enrolled in an off-campus study program).

**Transfer students.** The *Bylaws of Mortar Board, Inc.* (Article VI, Section 1.9) state that an active member of Mortar Board, Inc. who transfers must be accepted on the campus to which she/he transfers and given privileges of an active member. Please make a special effort to obtain information about previous college records of transfer students. It is the responsibility of each chapter to obtain all transfer and grade records within reason to make a true and accurate judgment of a candidate’s eligibility. Enlist your advisor’s support to make sure you are getting the information you need from the registrar.

**Other exceptions.** Exceptions may also sometimes be made regarding candidate GPA and chapter size.

**Scholarship** - Your chapter is encouraged to select candidates whose GPAs fall below your grade threshold if they demonstrate true academic achievement but extenuating circumstances or a demanding curriculum have caused grades to be depressed. This is a decision your chapter may make at selection without further approval from the National Office. You **MUST** submit a Petition for Scholarship Exception to the National Office if you are considering any candidate with a GPA below a 3.0.

**Special selection** - This occurs when a candidate is eligible for a selection exception for an unusual situation that seems reasonable but is not covered in the *Bylaws*. Exceptions will be considered by the National Office on a case-by-case basis.

**Chapter size** - A chapter that plans to select a number of candidates larger than 50 (or 1.5% of the student body with junior standing), may petition the National Office to do so well in advance of selection. The National Office will determine if the increased number of members is "right sized" for the campus community.

Chapters are not permitted to select fewer than 15 candidates (or 10 percent of the student body with a junior standing, whichever is less). Chapters must ensure they have enough nominations and applications for membership to meet this requirement **BEFORE** holding a selection meeting.

**Honorary membership.** Honorary membership, as granted by the *Bylaws* (Article III, Section 3) is a unique recognition reserved for those who have made a notable contribution over a period of years and whose influence has extended beyond the college or university. Candidates for honorary membership must be approved by the National Office before they are tapped. Petitions and supporting documentation must be submitted to the National Office at least two weeks before tapping. Names of persons being considered should be kept confidential (*i.e.*, the nominees especially should not know of the nomination.) The honorary member is considered a regular member and should participate in chapter activities as an active member. At initiation, honorary members will receive a certificate and pin. The membership fee for an honorary member approved in advance of tapping is complimented by Mortar Board, Inc.

Consider the following when trying to determine if the person(s) you are looking at for honorary membership is (are) the right choice.

- Have you determined that the candidate is not already a member of our Society? Ask the National Office for help.
- Does the candidate hold at least a baccalaureate degree?
- Have the candidate's contributions been above the expectations of the position she/he occupies?
- Has the candidate's impact extended beyond campus?
- Is the chapter considering the candidate because of objective reasons that make her/him qualified for honorary membership or because of an emotional tie the chapter has to the person?

Many chapters form relationships with members of the campus community who do not meet the criteria of honorary membership. Please consider awarding a Chapter Citation to those outstanding persons whom your chapter wishes to

recognize. Contact the National Office. This is a great way to provide recognition.

**Gift memberships.** Your chapter should have a gift membership fund to help candidates with financial need. If necessary, chapters may request one gift membership from the National Office. The gift membership may be awarded to one or divided among several members. The recipients are to be selected confidentially by the chapter president and administrative officer of the school or chapter advisor. Chapters are strongly encouraged to contribute to the Jane K. Smith Gift Membership fund to support national gift memberships.

## **CANDIDATE REQUEST (CR) AND OFFICIAL MEMBERSHIP REPORT (OMR)**

The Candidate Request (CR) and Official Membership Report (OMR) are the most important Mortar Board reports of the year. They provide Mortar Board with vital demographic information about new members so their eligibility can be reviewed and approved by the National Office and membership can be recorded on the official roll of the Society. Although they may have been selected, members may not be tapped or initiated until they have been submitted on the CR and subsequently approved by the Mortar Board National Office. Please submit the CR immediately following the selection process and two weeks before tapping. Be sure to spell names correctly, as all membership certificates are issued using the information provided. Once the CR is received, candidates can be approved and your chapter will be mailed a package with important materials needed for tapping, initiation and orientation.

### **Information to report to the National Office on the CR**

- Name of school and chapter
- Date of tapping (or range of dates, if applicable)
- Date of initiation
- Date of officer transition
- Campus mailing address for the person (preferably the advisor who will receive the membership pins and certificates)
- Certified candidate list including demographic information, to be approved by the National Office
- A Petition for Maximum Chapter Size Exception if selecting more than 50 (or 1.5 percent of the student body with junior standing, whichever is greater) - chapters may not select fewer than 15 (or 10% of the student body with junior standing, whichever is fewer)
- A Petition for Scholarship Exception for any candidate whose GPA is below 3.0, but who is deserving of membership
- Contact information of the person submitting the report, the chapter president, and the chapter advisor so that they can be reached in the case of questions

### **Submitting the OMR and all required fees**

Once initiation is complete, the OMR must be submitted to the National Office to confirm the paid status of each new member. Along with the OMR, all fees must be submitted either through the online payment portal or by chapter check. Without payment of all national fees, your chapter is ineligible to vote in national governance. Complete payment must be submitted online or by chapter check to the National Office no later than seven days after initiation. There are three types of fees required by Mortar Board:

- Membership fee - This is the fee to be paid by all newly-initiated members, not including any local dues your chapter may require.
- Continuing senior fee - Members who are not yet

graduating and would like to continue their active Mortar Board membership for an additional year must pay a continuing member fee.

- Conference fee - Each year, representatives from every Mortar Board chapter attend the national conference. Each chapter is required to pay the conference fee. This fee covers less than half of the actual cost. The conference fee may be paid online, submitted via chapter check or by calling the National Office.

Finance charges and late penalty fees may apply when fees are submitted after the legislated deadlines.

## TAPPING

Mortar Board's tradition of tapping dates back further than the birth of the national organization, beginning as long ago as 1892 when the Der Hexenkreis chapter at Cornell University was founded as a secret society for women. Then, new members were tapped in the middle of the night. Chapter members dressed entirely in black, complete with hoods covering all but their eyes, surrounded the bed of a selected member. They awakened the new member by uttering a Latin invitation in unison, and then they initiated her. When Cornell joined with the University of Michigan, Swarthmore College and The Ohio State University to create Mortar Board, the university's rich tapping traditions passed on to the other chapters. Each chapter had its own unique methods and adaptations, which have evolved greatly over the years. Ohio State continued the late-night method well into the 1950s, sending black-robed members by candlelight into the homes of surprised candidates. Many chapters passed physical items, such as flowers or candles, to new initiates as a part of their tapping ceremony. For instance, Florida State University's members bore lighted torches, presenting them to newly chosen members, while Northern Arizona University chose the less dangerous option of red roses. Many chapters continued to hold their tappings in secret, while others opted for public places where all could see. Some were held during banquets or large meetings, while others were held during classes. Some schools, such as Indiana University, recognized their new members at both a secret and a public tapping.

Today, tapping ceremonies vary significantly from one campus to the next. Most chapters tap members at a public place among peers (such as in a classroom), while some chapters prefer a more personal notification. As recently as 1996, Cornell University still practiced a version of their traditional tapping ceremony, waking members sometime after midnight and taking them to a special meeting place for fellowship and a brief orientation. Some of the most vivid memories members have are how they were tapped, illustrating how this meaningful tradition has shaped a century of members, and will continue to create profound memories for years to come.

### How to make tapping memorable on your campus

Tapping must always be done in person, unless physically impossible. Letters, emails and phone calls tend to be impersonal, especially for an honor as high as Mortar Board. Tapping happens differently on each campus, but one common thread is that it is a very memorable, visible event.

Today, some chapters tap members in their classes or during meetings for cocurricular organizations, and others gather their new members in the middle of the night for a special welcome meeting. Dressing in caps and gowns and carrying lighted

candles, chapter members "tap" new members in numerous places, often providing them with a scroll including information about a formal orientation meeting. Some chapters have even gotten creative, tapping students studying abroad using YouTube videos.

Official tapping should be done by physically "tapping" the members with a slight tap on the head or shoulder with a mortarboard. Be sure to check with your campus administration or faculty before you make any plans for tapping – respect for university policies is of the utmost importance.

### Tapping tips

If you hope to tap during a class, contact the instructor for approval prior to tapping. If you are unable to enter a new member's classroom to tap them, coordinate the tapping for a meeting of another student organization. Often, it is useful for an advisor or alumni member to go with your tapping team into the classroom. Even if you have prepared the faculty member ahead of time that her/his class might be interrupted, you may find that the presence of an older campus or community figure will lend credibility and significance. On one Mortar Board campus, the university president participates in tapping!

On the membership application, have Mortar Board candidates write their own 200-word biographies (later, these biographies can be read during each candidate's tapping and initiation) and include a class schedule to help facilitate tapping.

Clearly coordinate the tapping process with your chapter members; assign current members to new members to be certain that no candidate gets overlooked or tapped twice. Allow for a one-week period to tap new members to ensure that you will have plenty of time to tap everyone. Keep a master tapping list in a private area on campus, such as a chapter mailbox or Google Drive, that current members can mark once they have tapped each member—this way everyone is aware of who has and has not been tapped to prevent duplicate tappings and early congratulations (if you wish to congratulate a new member, be sure to check the tapping master list first; you don't want to spoil the surprise).

Some chapters, such as the one at Purdue University, sing a special song as they tap a newly-selected candidate. To learn the song, search for Purdue Mortar Board tapping on YouTube. Add a special touch to the tapping by giving new members congratulatory tokens such as flowers, candles, medallions or scrolled information on the orientation or initiation. Present the new member being tapped with a "tapping packet" containing all the information she or he needs to know about Mortar Board (this should include orientation information, an initiation invitation, chapter history, and a list of chapter events through the end of the year). Dress in cap and gown when tapping new members. If a gown is unavailable, try to at least wear a mortarboard cap so you can use it to lightly "tap" the new member on the shoulder.

For a candidate who is studying abroad, instead of sending an email, consider virtual tapping by uploading a short tapping video to YouTube and asking the candidate to watch it.

### The tapping packet

A tapping packet is a great tool for providing members with everything they need to know immediately following tapping. Here are some ideas for materials to include:



- A link to the online Member Guide
- Fliers/brochure sent with the pin/certificate mailing
- Orientation flier or information sheet
- General brochure about national Mortar Board
- Initiation invitation or information sheet
- History of your local chapter of Mortar Board
- List of notable members of Mortar Board
- Calendar of chapter activities through the end of the year
- Chapter Participation Policy
- Contact information for the current officers and advisors
- List of current members

### Sample script for classroom tapping

Hello, I'm Jane Smith, a member of the Gold and Silver chapter of Mortar Board at Blank University. Mortar Board is the premier national college senior honor society whose members are selected for excellence in scholarship, leadership and service. I am pleased to announce that a member of your class has been selected for membership in Mortar Board: Lacey Hamilton. Lacey, will you please come to the front of the classroom? Lacey is a junior from Lakeland, Wisconsin, majoring in chemical engineering. She is vice president of the Campus Equestrian Club, secretary of Campus Democrats, and a leader in the Chemical Engineering Society. We wish to tap Lacey to Mortar Board on the basis of her high achievement and dedication to her campus and community. Please join me in congratulating Lacey on her invitation to be a part of Mortar Board. Thank you.

## ORIENTATION

Familiarizing your new members with Mortar Board by way of an orientation is vital to the success of your chapter as well as the national organization. Not only is it helpful, but it is also required. According to the *Bylaws of Mortar Board Inc.* and Chapter Minimum Standards, each chapter must hold an orientation prior to initiation.

### Who is responsible for orientation?

The outgoing president is responsible for seeing that orientation occurs. However, many chapters delegate this responsibility to a membership chair or committee, which coordinates selection, tapping, orientation, initiation, officer elections and chapter transition. Each of these facets is equally important. The Officer & Advisor Handbook has additional details on all of these activities.

### Goals of orientation

- To inspire and motivate new members, helping them to develop pride in being part of Mortar Board.
- To build a team out of the group of new members.
- To share information about Mortar Board as a national organization as well as Mortar Board's Ideals of scholarship, leadership and service.
- To familiarize candidates with information about the local chapter's projects, tradition and structure.
- To develop a commitment to active membership in and loyalty toward Mortar Board.

### Orientation formats

There are plenty of methods that may work for your chapter, such as a retreat, session at the home of advisors or alumni, or meeting on your campus accompanied by a meal, refreshments or group outing. Be sure to refrain from quick meetings with no group interaction, meetings with a lecture format or a lack of information provided to tapped candidates, who have little time to prepare and ask questions or get familiar with Mortar Board.

**Make it unique.** Each chapter of Mortar Board is different, as is each member of each chapter. These differences and unique talents can make for an amazing orientation.

**Set goals.** Each orientation should serve a purpose, so be sure to outline your goals as one of the first steps of planning.

**Inspire.** Motivate members to be active in the chapter and community for the upcoming year. Tell anecdotes or show a slide show about the wonderful memories you and other members made with your time in Mortar Board. Be sure to invite outgoing members to share their experiences firsthand.

**Instill pride in new members.** Teach them about your chapter's local projects, tradition and structure, and allow them to take pride in knowing that they are the future of these traditions. Their ideas will help your chapter to grow year after year. Also be sure to remind them that they are part

## TIPS FOR ADVISORS

- Review this handbook and make sure you are well-versed in the selection model your chapter will use.
- Practice with your membership chair and other officers to assure a smooth meeting.
- Attend the selection meeting. It is required. Your presence helps the chapter meet chapter minimum standards and provides continuity and gravity.
- At a meeting sometime before selection, make sure that the National Principles are discussed by the chapter. At the selection, make sure that the National Principles are read aloud.
- Refrain from participating in discussion about candidates. The debate is for collegiate members and may not be influenced by advisors.
- Sometimes advisors will be in a position to know confidential information about a candidate (i.e., disciplinary action, academic misconduct, etc.). This must be handled very carefully so as not to violate a student's rights under campus privacy rules. Please contact the National Office before the selection meeting to discuss your concerns and a strategy.
- Likewise, a member may come to you during a selection meeting with a concern about the way a candidate has represented herself/himself. This too must be handled carefully with respect for the process and the candidate's privacy. It must not disrupt the selection meeting. Contact your section coordinator or the National Office immediately to discuss a strategy. Having another advisor present to help you handle these kinds of things is ideal.
- Maintain an atmosphere of positive commentary on all candidates. If discussion turns negative, encourage your membership chair to change topics to prevent biases.
- Make sure your officers follow up by submitting the CR to the National Office as soon as possible.
- Be an active participant after selection in new member orientation and initiation. You are a source of continuity in a chapter whose members change each year. Get to know new members early.
- Provide guidelines and structure during transition so the new class gets off to a good start.

of a national tradition that has lasted nearly a century and continues to expand each year.

**Build a team.** When the members arrive at orientation, they could likely be a diverse group of strangers. Use icebreakers and team-building exercises to transform this group of individuals into a team.

### Suggested orientation agenda

- Provide a link to the Member Guide to members at the start of the orientation. Use it as a workbook and resource throughout the meeting, so that they can follow along to learn about the national organization.
- Icebreaker - Play team-building and “get-to-know-you” exercises to bring the group together. Check out the chapter section on our website for icebreaker ideas and other meeting resources.
- National orientation
  - Purpose - Review the purpose of the organization as found in Article II of the *Bylaws*.
  - History - Refer to the Member Guide and tell the story of how Mortar Board began and has evolved. Mortar Board will celebrate its centennial in 2018!
  - We are student-governed. Explain the organizational chart for Mortar Board as seen in the Member Guide and cover the *Bylaws* and National Conference.
  - Duties of National Council and section coordinators
  - National Office and available services, including official merchandise items
  - National project - “Reading is Leading”
  - National Foundation - purpose and fellowships
  - Publications: *Forum*, *Leading Leaders*, *Officer & Advisor Handbook*, *Membership Selection Handbook*
- Local chapter
  - History and traditions
  - Activities and programs
  - Job descriptions of officers
  - Meet the advisors
  - Area alumni and alumni interaction
- Advantages of membership
  - Academic recognition by your college or university
  - Fellowships for postgraduate study
  - Free access to Portfolium
  - Access to print and electronic publications
  - Discounts on insurance and banking with Nationwide®
  - Discounts and member offers from national partners
  - Instant pay increase for federal government positions
  - Career development via Mortar Board’s LinkedIn group
  - National network through social media community
  - Discounts on recognition pieces by Church Hill Classics
  - Kaplan test preparation discounts
  - Scholarship from the Washington Internship Institute
  - A Washington Center internship housing scholarship
  - Scholarship for The Fund for American Studies Summer Institute or Capital Semester
  - The opportunity to apply for the NIH-Oxford-Cambridge Scholars Program, a fully-funded Ph.D. program in biomedical research
- Expectations of membership
  - Commitment to active participation
  - Support of chapter achievement of its goals
  - Adherence to local and national constitutions and other policies, including the *Bylaws*
  - Financial obligations: membership fee paid prior to initiation and local dues, if applicable

- Obtain current contact information
  - Be sure to get all contact information (summer, permanent and fall mailing addresses; email address; phone; etc.) for each member, especially chapter officers
- Initiation procedures
  - Date, time and place
  - Guests invited and welcomed

## INITIATION

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When Mortar Board was formed as a national society in 1918, representatives from the founding chapters explicitly selected a special set of events to make up the initiation ceremony. While it is important to make your own chapter ceremony unique, it is also important to follow the rich traditions of Mortar Board when initiating newly-selected members. The complete text for the ceremony is included in the Initiation Ceremony booklet.

### Preparation

- Locate caps and gowns.
- Distribute copies of the initiation ceremony to all those with speaking parts.
- Practice the ceremony, the songs and the speaking parts.
- Make rain plans if you are having an outdoor event.
- Invite faculty, administrators and families.
- Consider having a special speaker, such as a local alum, honorary member or university administrator.
- Invite your section coordinator or other National Leaders.
- Invite local alumni and have an alum initiate the outgoing members as alumni.
- Prepare refreshments to be served following the ceremony.

## CHAPTER AND OFFICER TRANSITIONS

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Chapter transition is essential for getting the new class of Mortar Boards off to a great start! The active participation of both outgoing and incoming members is vital to a good handoff. There will be a group transition, where all members of both classes meet to discuss the past year--both the successes and the challenges--and talk about a vision and goals for the upcoming year.

We can’t over emphasize the importance of one-on-one officer transition, where each outgoing officer meets in person with the incoming officer. Leading a Mortar Board chapter is unlike other student groups, and new officers will need the direction and counsel of the outgoing officer. This will be the time to review reporting requirements and past records and for the new officer to ask questions. The outgoing officer should also hand chapter records, organized in a binder or a flash drive, to the new officer. Since officers take the lead in transitioning the chapter, this topic is covered in great detail in the *Officer & Advisor Handbook*. Please read that handbook thoroughly to make sure you understand the responsibilities of each officer.

## FREQUENTLY ASKED QUESTIONS

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### Must my chapter use the Selection by Consensus model?

It is the preferred model. Other models may be practiced with the section coordinator’s approval. Your chapter will need to outline how you plan to conduct selection using your Chapter Action Plan (CAP) and submit it to the National Office on or before September 15. Remember to adhere to the selection principles and Mortar Board Ideals when deciding how to conduct your selection process.

**Must all candidates submit an “application” or nomination form to be considered for membership?** No. Many chapters use nomination forms and applications to aid in evaluating and selecting members. Because selection to Mortar Board is an honor, the lack of a nomination form or recommendation must not be a reason for failing to consider a candidate.

**Since members are busy, should the selection process be carried out in as short a time as possible?** It takes time and care to do a thorough job of selecting new members. This handbook and other membership resources are available online so chapters can start early or work at their own pace. Your chapter should discuss the selection principles thoroughly and practice the process before holding the selection meeting.

**Is using a high grade point average as the chapter minimum standard a good way to limit the candidate eligibility pool and upgrade the quality of the chapter?** The scholarship requirement is the minimum grade point average representing the upper 35% of the junior class or a B average, whichever is higher on your campus. With the annual consent of the National Office, a chapter may raise its scholarship requirement. Limiting the candidate pool is not considered a valid reason for approving a GPA standard above the minimum. Keep in mind that raising the grade point average standard may eliminate potential members who are well-balanced in scholarship, leadership and service in favor of high academic performance. It also may systematically favor some groups or majors and work against other students.

**Is the best way to promote Mortar Board membership to mail to each academically eligible candidate?** Mailing information to eligible candidates is a good way to spread the word about Mortar Board, but since no list is completely accurate, your chapter should use several methods. Try campus media, information tables, open houses, fliers, banners, displays, faculty/staff nominations and email to announce that membership selection is approaching. Your chapter may decide that specialized approaches are needed to reach certain groups of students (for example, students abroad, commuting students, nontraditional students). The best way to promote Mortar Board is a combination of methods to be sure that all eligible students are reached. Please make special efforts to publicize to students away from campus.

**If I know a Mortar Board candidate would not be a good member or is misrepresenting herself/himself, should I say anything at the selection meeting?** In selection meeting discussion, all members are charged with confidential, affirmative appraisal of candidates. However, to maintain standards of scholarship, leadership and service, objective and constructive criticism may be allowed. First consult with your advisor during the selection meeting if this becomes an issue.

**Can candidates who can't pay the membership fee still join Mortar Board?** Yes. Mortar Board provides each chapter one gift membership in case of financial need. The gift membership may be awarded to one initiate or divided among several. The recipient(s) is (are) to be selected confidentially by the chapter president and advisor. Your chapter should have its own fund for this purpose, as well, to assist other worthy members.

**May students studying off campus (for example: those on international study programs, internships or student teaching assignments) and those who are graduating mid year be considered for Mortar Board?** Yes. Academically eligible students in these categories are part of the candidate pool and should receive consideration. This handbook, the *Bylaws* and your “people resources” (advisors, National Office and national leadership) can advise your chapter on questions related to these categories. Students who will be away from campus are discouraged from holding an office.

**Are chapters encouraged to annually select an honorary member?** Yes and no. Each chapter is allowed and encouraged to tap honorary members. Honorary membership may be conferred on a person who has made a significant contribution toward Mortar Board's goals and purposes at the college or university and in the community or region. Approval is given by the National Office. A Mortar Board member is not eligible for honorary membership. It should only be conferred upon deserving candidates and not granted just for the sake of doing so. Honorary membership can be bestowed at any time during the academic year but must be approved at least two weeks prior to tapping.

**May new members be tapped immediately after selection?** No. Your chapter's candidate list (CR) must be approved by the National Office before tapping can occur. Please allow at least two weeks for the National Office to approve your list before you plan to begin tapping. Under no circumstances may tapping proceed before approval of the candidate list.

**What are local dues and should my chapter have them?** Some chapters charge each new member local dues over and above the national membership fee to help build their treasury for the year's activities. This is not a requirement; your chapter should consider its budget and decide if a local dues amount is appropriate. The National Office offers to collect your chapter's local dues from your candidates through the online payment portal. Chapters electing to use this service must indicate this preference and supply the amount of local dues to be collected on the OMR. Chapters that utilize the local dues collection service from the National Office will be assessed a 3% processing fee. This fee will be deducted from the total amount of local dues collected by the National Office.

**What about the conference fee?** The conference fee is an annual fee assessed on all chapter to help defray the cost of the national conference. Each chapter must send at least one delegate, and the conference fee must be paid even if the chapter is not able to supply a delegate. Mortar Board pays for all of the accommodations, program costs, and meals of the official delegate on site. Each chapter is also responsible for funding its official delegate's travel to the conference. These travel costs are entirely separate from the national conference fee. Build them into your chapter's annual budget. The conference fee may be paid through the online payment portal, submitted via chapter check or by calling the National Office.

**Where can I find other resources to help my chapter with the selection process?** Visit [www.mortarboard.org](http://www.mortarboard.org) to find recruitment tools, templates and application tips to guide you through your selection process. You should also ask your section coordinator to help facilitate sharing in your section. Many of your peer chapters have well developed materials and plans. Never hesitate to ask the National Office for help!

## MEMBERSHIP SELECTION TIMELINE

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The first step in executing a quality selection process is coming up with an effective timeline for your chapter. Mortar Board requires that chapters tap members no later than six weeks before the last day of spring classes. Following is a suggested timeline for selection. The suggested schedule below is designed primarily for chapters on semester schedules. Those on other schedules must adapt their dates. The *Bylaws* stipulate that each chapter hold its initiation ceremony at least four weeks before the last day of classes in the spring term.

### September

- Submit Chapter Action Plan (CAP) to the National Office on or before September 15
- Finish setting chapter calendar

### October

- Form membership committee
- Discuss honorary membership for appropriate campus/community persons
- Secure guest speaker for initiation

### November

- Create nomination form
- Reserve rooms for selection, orientation and initiation
- Advertise or publicize in campus media (such as newspapers or radio stations)
- Ask your registrar to provide you with the names of all eligible students

### December

- Email all eligible students to encourage self-nominations
- Contact faculty, staff and student organizations to encourage nominations

### Mid January

- Run through a practice selection meeting with advisor present
- Send reminders to deans, departments, faculty, other organizations and eligible students

### Late January

- Deadline for nominations and applications
- Members review nominations and applications
- Make sure all materials are prepared and rooms are reserved for selections and initiation

### Early February

- Meet as a chapter in your selection meeting to select new candidates and honorary members (advisor present)
- File Candidate Request (CR) immediately after selection and no fewer than two weeks before tapping
- Organize public tapping

### Mid February

- Mortar Board ships membership materials to your advisor after approval of CR - do not initiate without these items
- Publicly tap new candidates
- Send invitations for initiation to faculty, honorees, families, section coordinator and local Mortar Board alumni

### Late February

- Hold orientation meeting: collect fees, distribute materials, discuss activities and participation requirement
- Hold outgoing chapter meeting to plan and rehearse initiation ceremony

### Early March

- Submit membership fees, the chapter annual conference fee and electronically submit the OMR to National Office

### Mid March

- Initiate new members using the Initiation Ceremony booklet as a guide
- Hold officer elections for the new chapter with outgoing chapter members present
- Report the chapter's new officers and the official delegate on the New Officer Report
- Organize a transition meeting of old/new officers and determine conference delegate

### Early April

- New chapter meets to generate ideas for the next year as well as exchange summer addresses and email addresses

### Mid April

- Instruct the newly elected president to register as the chapter delegate for conference
- Hold a chapter social event to with the new and graduating chapter members

### May

- Submit all end of year reports and award applications to the National Office on or before May 15. A complete list of required reports can be found online

### Summer

- Attend the National Conference