



# OFFICER & ADVISOR HANDBOOK

MORTAR BOARD  
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## RESOURCES

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**Officers and advisors.** During the transition between classes, new officers must meet with their predecessors. Transfer files, discuss concerns, ask questions. Orientation to the “job” is crucial! Advisors are the key to chapter continuity. They not only answer questions, but provide inspiration and insight. They can help connect you with other resources. New officers must get to know each other, set goals, secure summer addresses, discuss the budget, and begin working on the Chapter Action Plan (CAP).

**Members.** Everyone in your chapter was selected for excellence in scholarship, leadership and service. Your members have many campus connections that can help your chapter achieve its goals. Partnerships with other student organizations can be a wonderful way to accomplish goals. You also have alumni not only from your own chapter, but from other chapters, right in your back yard.

**Section coordinators.** SCs are part of Mortar Board’s national leadership. Your chapter is part of a section within your state or region. Your SC—who oversees all of the chapters in your section — will help in whatever way you need! SCs are Mortar Board alumni, and they are connected with chapters across the country. SCs know a lot about your chapter and others near you. If your chapter has a new advisor, or the transition from last year’s officers did not meet your needs, your SC can help you fill in the gaps.

**National Office.** The Mortar Board National Office staff is here to help with anything you may need. Call us at 800-989-6266 or email [mortarboard@mortarboard.org](mailto:mortarboard@mortarboard.org).

## ACTIVE CHAPTERS, BY SECTION

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### Northeast (Section 1)

University at Buffalo • University of Connecticut  
Cornell University • Endicott College  
Rowan University • University of Vermont  
Western New England University

### Pennsylvania (Section 2)

Bucknell University • Chatham University  
Carnegie Mellon University • Duquesne University  
Grove City College • The University of Pennsylvania  
The Pennsylvania State University • University of Pittsburgh  
Westminster College

### Mid Atlantic (Section 3)

Hood College • James Madison University  
Longwood University • University of Maryland  
University of Mary Washington • University of Richmond  
West Virginia University • College of William and Mary

### Southeast (Section 4)

Agnes Scott College • Clemson University • Converse College  
Emory University • Lenoir-Rhyne University  
Queens University of Charlotte • Salem College  
University of South Carolina • Wake Forest University

### Floribama (Section 5)

The University of Alabama • Auburn University  
Birmingham-Southern College • University of Florida  
Florida State University • The University of Miami  
University of South Alabama • Troy University

### South (Section 6)

Alcorn State University • University of Arkansas  
University of Louisiana at Monroe • Louisiana State University  
Lyon College • University of Mississippi • Mississippi College  
Mississippi State University • Mississippi University for Women  
Tulane University

### Tennessee Valley (Section 7)

Berea College • Carson-Newman University  
Fisk University • University of Louisville • Rhodes College  
University of Tennessee at Chattanooga  
University of Tennessee at Knoxville  
Tennessee Technological University • Vanderbilt University

### Southern Ohio (Section 8)

University of Cincinnati • Denison University  
The Ohio State University • Ohio University  
Ohio Wesleyan University • Otterbein University  
Wittenberg University • Xavier University

### Northern Ohio (Section 9)

The University of Akron • Bowling Green State University  
Case Western Reserve University • The University of Findlay  
Kent State University • Lake Erie College  
Ohio Northern University • The University of Toledo

### Michigan (Section 10)

Adrian College • Albion College • Eastern Michigan University  
Hope College • Northern Michigan University  
Michigan State University • University of Michigan

### Indiana (Section 11)

Ball State University • Butler University • DePauw University  
Hanover College • Indiana University • Purdue University  
Valparaiso University

### Illinois (Section 12)

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

### Upper Midwest (Section 13)

Beloit College • Carleton College • Lawrence University  
University of Minnesota Duluth  
University of Minnesota Twin Cities  
University of Wisconsin - Eau Claire  
University of Wisconsin - Milwaukee

### Northern Great Plains (Section 14)

Coe College • Cornell College • Drake University  
The University of Iowa • Iowa State University  
The University of Nebraska - Kearney  
The University of Nebraska - Lincoln  
University of North Dakota • North Dakota State University  
The University of South Dakota • South Dakota State University

### Southern Great Plains (Section 15)

Drury University • Fort Hays State University  
The University of Kansas • Kansas State University  
University of Missouri - Columbia  
University of Missouri - Kansas City  
Stephens College • Washburn University  
Washington University in St. Louis • Wichita State University  
William Jewell College

## Central (Section 16)

Oklahoma Baptist University • Oklahoma State University  
Southern Nazarene University • University of Tulsa

## Texas (Section 17)

Baylor University • Midwestern State University  
University of North Texas • Southern Methodist University  
Texas Christian University • Texas Tech University  
Texas Wesleyan University • Texas Woman's University  
West Texas A & M University

## Southwest (Section 18)

University of Arizona • Arizona State University  
The University of New Mexico

## Rocky Mountain (Section 19)

The Colorado College • Colorado State University  
The University of Denver • Idaho State University  
University of Montana • Montana State University  
The University of Northern Colorado • University of Utah  
University of Wyoming

## Pacific Northwest (Section 20)

California Polytechnic State University • University of Oregon  
Oregon State University • University of the Pacific  
Pacific Lutheran University • University of Puget Sound  
Seattle Pacific University • University of Washington  
Washington State University • Willamette University

## West (Section 21)

University of California, Los Angeles  
California State University, Channel Islands  
Chapman University • University of Hawaii at Manoa  
Occidental College • Pomona College • University of Redlands  
University of San Diego • San Diego State University  
University of Southern California

## CHAPTER AWARDS

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**Ruth Weimer Mount Chapter Excellence Award.** This award is the highest honor in chapter achievement. To be selected, a chapter must excel in all areas. A chapter that receives this award is not eligible again for five years.

**Most Improved Chapter Award.** This award recognizes a chapter that has achieved success in re-invigorating programming and membership.

**Torch Awards.** The Gold Torch Award is given to chapters that surpass the minimum standards, exemplifying scholarship, leadership and service. The Silver Torch Award is awarded to chapters meeting the Chapter Minimum Standards.

**Project Excellence Awards.** These awards promote new events and projects chapters have executed throughout the year.

## MINIMUM STANDARDS

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We can't give awards to just anyone. The basic requirement for any national award is to meet the Chapter Minimum Standards:

- Select new members on the basis of distinguished ability and achievement in scholarship, leadership and service.
- Submit the Chapter Action Plan (CAP) by the deadline.
- Prior to tapping, send the names and qualifications of candidates to the National Office on the Official Membership Report for verification.

- Tap new members well before the end of the school year.
- Hold orientation prior to initiation for those tapped.
- Hold an initiation ceremony for new members.
- Collect the national fees associated with membership before initiation. Submit all fees with the Official Membership Report to the National Office.
- Elect and orient new chapter officers before the end of the school year.
- Hold regular and frequent meetings.
- Establish a participation policy.
- Have at least one advisor.
- Submit all annual report forms to the National Office by the end of the school year.
- Send a delegate to the Mortar Board National Conference.
- Develop and implement programs related to the Ideals of scholarship, leadership and service.

## NATIONAL INITIATIVES

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One of the great things about being a national organization is when we do things together, people notice. Our impact goes beyond individual campuses to reach a broader audience. There are two major ways chapters work together to increase awareness about Mortar Board and the issues we support.

**Mortar Board Week.** Mortar Board Week is the celebration of our founding on February 15, 1918. Mortar Board Week is always held during the week that includes February 15, regardless of the day of the week on which it falls. Mortar Board Week is all about promoting your chapter on your campus, and promoting our Society to a national audience. Whatever you plan for this week, make sure to publicize it in campus or local media! Resources and ideas can be found online on the Mortar Board website ([www.mortarboard.org](http://www.mortarboard.org)). A few suggestions on how your chapter can celebrate include:

- Hold a major event.
- Recruit new members.
- Connect with alumni.
- Connect with other chapters in your section.

**Advisor Appreciation Week.** Good advisors and a solid advising team are critical to the success of a Mortar Board chapter. During Advisor Appreciation Week each year, chapters are encouraged to recognize the hard work and dedication of their advisors. Here are just a few examples of how your chapter can show appreciation:

- Nominate an advisor for an Excellence in Advising Award. These awards are given annually at the national conference.
- Honor your advisor or advisory team at a public event.
- Submit a petition for honorary membership for longstanding advisors who are not already members.
- Visit your advisor's office as a group to show your thanks - bring donuts or ice cream to share with officemates.
- Nominate your advisor for campus awards or recognition.
- Order a gift for your advisor from the Mortar Board Store.

**Centennial.** Mortar Board celebrates its 100th birthday in 2018. Chapters should start saving now to send extra members to the Centennial Celebration, which will be held at MBNC2018 in Columbus, Ohio, August 3-5. Other initiatives:

- Start a Chapter Endowment Fund in the Mortar Board National Foundation to provide "forever funding" for your chapter. Contact the National Office.
- Select Torchbearers from your chapter. A Torchbearer is one who has reliably and meaningfully provided

leadership for your chapter over a long period of time. This is a great way to honor past as well as current leaders who have made your chapter what it is today.

- Plan to make a financial contribution to the Centennial Campaign. That way your chapter will be listed always as a contributor in the Centennial Book of Donors. If you start a chapter endowment fund, then you are automatically included.
- Plan a celebration on your campus for Mortar Board's 99th Birthday (See Mortar Board Week) and also for Mortar Board's 100th Birthday. Celebrate your own chapter's birthday at the same time!

**Reading is Leading.** The national project started in 1985 as a way to tie all chapters together for service on one common issue. Originally, a new national project was selected every year. But, to help with continuity and allow chapters to build successful long-term projects, Reading is Leading was made the permanent national project in 2002. Think about the importance of reading — it is a fundamental building block to personal and professional success at any level. Academic integrity and scholastic achievement is impossible without the ability to read. It is truly a life skill, but, more than that, it opens us up to new worlds and new experiences. Reading is Leading is our effort to promote literacy within the framework of promoting knowledge. The great thing about Reading is Leading is that it is broad enough to allow your chapter to choose a literacy project that has impact and is meaningful to your campus or community. The key to any great Reading is Leading project is to engage the rest of your campus in your efforts. Suggestions include:

- Partner with other student organizations.
- Find established projects on your campus.
- Find an expert on the subject.
- Make sure campus officials are aware of your efforts.

## **OFFICER RESPONSIBILITIES**

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### **PRESIDENT/VICE PRESIDENT**

As chapter president or vice president, you oversee the chapter's operations. While this may sound like a daunting task at first, there are many resources and many people to help you!

#### **Responsibilities to your chapter**

- Call chapter meetings and establish a meeting schedule.
- Preside fairly at chapter meetings.
- Be respectful of time, but let everyone participate.
- Facilitate chapter goal-setting.
- Meet with other officers regularly.
- Verify payment of all national fees.
- Update administrators on chapter activities.
- Offer chapter assistance to the college/university.
- Be familiar with chapter and national *Bylaws* and policies.
- Thoroughly review the Chapter Minimum Standards.
- Ensure orientation and transition of new class.
- Ensure transition and orientation of new officers.

#### **National responsibilities**

- Complete the New Officer Report on or before May 15.
- Register for the national conference on or before May 15.
- Serve as the official delegate to the national conference.
- Maintain communication with your section coordinator.
- Correspond with leaders from other chapters.
- Submit the Chapter Action Plan on or before September 15.
- Submit the Chapter Annual Report on or before May 15.

- Verify that the following reports were completed:
  - Official Membership Report (OMR)
  - Final Official Membership Report (OMR) and fees
  - Finance Report
  - Historian Report (optional)
  - Advisor Annual Report
  - *Forum* submissions
  - Gold Torch Award nomination (optional)
  - Other award nominations (optional)

#### **Tips for setting the tone for your chapter**

It's ultimately up to you to see that the chapter functions, is productive and benefits both the members and the campus. Sometimes problems can be solved before they occur through the setting of a positive tone for the chapter.

- Be organized for meetings.
- Set goals that are measurable and attainable.
- Encourage and find ways to get all members involved.
- Fulfill commitments you make to a member or the group.
- Set aside time for the members to be social.
- Set and stick to a budget (created with the treasurer).
- Work to stay positive.
- Delegate.

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 must not do all the work for the chapter. Provide a conscientious example, fulfill your obligations and responsibilities to the chapter and then work to help other members succeed. Remember, people help support what they help create. 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 continuity.

#### **Responsibilities to your chapter**

- Keep all Minutes, correspondence and paperwork.
- Record Minutes of each meeting and distribute copies.
- Keep accurate roll of members' attendance at all functions.
- Notify members of place and time of meetings.
- Notify new members of their selection after approval.
- Notify new members of their orientation date and time.
- Orient and turn over all materials to your successor.

#### **National responsibilities**

- Submit essential correspondence to the National Office.

#### **Tips for taking Minutes**

Here are tips on what should be included in meeting Minutes:

- Type of meeting
- Name of the organization
- Date, time and place of the meeting
- Names of presiding officer and secretary
- The fact that a quorum was present
- The fact that previous Minutes were read and approved
- Details on reports were presented and any action taken
- Name of the mover of motions and exact text of motions

- The disposition of each main motion
- Notices of motions to be introduced at future meetings
- Points of order and any rulings that set precedents
- All counted votes should be recorded
- The time of adjournment

Type your Minutes on a computer and save to a 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, type 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 or place in Dropbox so all members may access them virtually. 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 throughout the year.
- Maintain documentation with the National Office.
- Gain approval from National Office on member dismissals and keep records of all correspondence.
- Attend executive committee meetings and chapter events.

### **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 money management. It is essential that a budget be prepared, fundraising be successfully accomplished and funds disbursed with accuracy and timeliness.

### **Responsibilities to your chapter**

- Serve as a signatory on chapter bank accounts.
- Oversee or serve on fundraising committee.
- Establish a chapter budget.
- Hold at least one fundraising event.
- Provide regular financial reports or updates to chapter.
- Collect new and continuing membership fees.
- Execute end-of-year audit of chapter financial records.
- Orient and turn over all materials to your successor.

### **National responsibilities**

- Complete the Chapter Finance Report on or before May 15.
- Submit all fees and final OMR to the National Office.
- Complete IRS Form 990 if annual receipts exceed \$25,000.
- Alert the National Office if you receive any IRS notices.

### **Tips for managing your books**

At the beginning of your term, review your chapter’s bank statements, prior budget and previous Chapter Finance Reports. Make sure you have forms 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. 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. If your chapter is in a deficit 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 educational 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 educational organization as well; and your chapter has a federal tax identification number. 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 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 mean that your chapter need not pay sales tax on items purchased for the good of the organization but must pay sales tax on items that will be used by individual members solely for personal benefit. Each state has its own policies.

### **The completed Official Membership Report (OMR)**

You need to verify whether each candidate is paid, refused or honorary and submit this information to the National Office. For each candidate, designate the following information on the Official Membership Report (OMR):

- Mark candidates as paying online or to the chapter.
- Account for any candidate who refuses membership.
- Indicate if the chapter is using the gift membership.
- Report the names of continuing seniors.
- Submit any national membership fees.
- Submit the chapter conference fee.

### **DIRECTOR OF COMMUNICATIONS**

As director of communications, you have the responsibility of making sure your chapter’s activities are publicized. 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.

### **Responsibilities to your chapter**

- Establish good relations with campus/community media.
- Keep a notebook of activities, deadlines and resources.
- Orient successor and turn over all materials.
- Maintain content on the chapter Website.
- Ensure chapter branding corresponds with national brand.

### **National responsibilities**

- Submit photos and stories to the *Mortar Board Forum*.

### **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. Work with other officers to establish visibility goals and 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 both timely and significant. In addition, a human-interest story can help your chapter gain publicity. 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. 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.
- 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!
- Include your contact information on the news release, as well as the information of who can answer questions.
- Members of the media like to receive their press releases in different ways. Be sure to double check their preferences before sending.
- 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 affiliates of ABC, CBS and NBC.
- Seek assistance from chapter members who are journalism or communications majors; consider forming a communications committee.
- 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 the historian.

### 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 an ongoing relationship with your former collegiate members. Just as they are alumni of your college or university, they are alumni of your chapter. 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?

The Mortar Board Alumni Association, or MBAA, was launched in July 2012 to connect with our 250,000 alumni more distinctively and formally. This association allows Mortar Boards to affirm their commitment to our Society while also providing them with a vibrant community in which to engage. Please encourage all graduating seniors to join the Mortar Board Alumni Association. 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.
- Use mailing list to keep alumni informed.
- Network with local alumni.
- Develop your chapter's sense of national spirit.
- Notify the National Office of famous chapter alumni.
- Orient and turn over all materials to your successor.

### National responsibilities

- Inform the National Office of address or name changes.
- Submit nominations for Emerging Leader, Alumni Achievement and Distinguished Lifetime Member Awards.

### 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.
- Reach out to the alumni association at your college or university to find area or chapter alumni.
- Ask alums for help with Homecoming, Mortar Board Week or just to come speak at a meeting.
- Consider creating an area alumni newsletter, complete with information on upcoming events.
- Encourage alumni to sign up for email newsletters from your chapter and on the Mortar Board website.
- Contact the local Mortar Board alumni chapter if one exists (a list of alumni chapters is available online). 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 or radio).
- Add interested alumni to your mailing list and contact them via phone or with a note.
- 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).

### Use alumni as a helpful resource

Mortar Board alumni have a wealth of experience and can enhance the chapter. Here are some ways to utilize alumni:

- 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 nominees for Distinguished Lifetime Membership, Alumni Achievement Awards and Emerging Leader Awards.
- 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 online. 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. This initial contact will make a real difference for your chapter because some alumni chapters provide financial and other support to local collegiate chapters. 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.

## **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.

### **Responsibilities to your chapter**

- Compile chapter history as it is made through the year.
- Review Mortar Board's history in the Member Guide.
- Maintain chapter archives.
- Take photos and record events with video.
- Collect newspaper clippings, videos and correspondence.
- Prepare a scrapbook detailing events of the year.
- Locate the chapter's charter on campus.
- Compile and read the chapter history at initiation.
- Orient your successor and turn over all materials.
- Provide a historical summary for your chapter Website.

### **National responsibilities**

- Serve as a liaison to the Historical Publication Committee.
- Share chapter history with the National Office.
- Complete the chapter Historian Report on or before May 15.

### **Tips for making history**

- Remember that the historian is noting history in the making.
- Keep a list of meeting dates, activities, speakers, etc.
- Take photographs at meetings, activities and of people who helped the chapter during the year.
- Start accumulating information early.
- Work on the chapter scrapbook as the year progresses so you are not overwhelmed at the year's end.
- Record chapter events electronically.
- Create an end-of-year video. This video can be distributed to graduating seniors, used as an orientation guide for new members, and submitted at the national conference.

### **Researching chapter history**

If a written account of the chapter's history does not exist, contact the National Office for copies of its records on your chapter's chartering. Seek out student affairs staff for information from previous chapters. Interview the 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 history will periodically need updating. The historian can delegate this task to a member who loves 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. Take into consideration the following:

- Age of the chapter.
- Whether or not you want to write a complete history.
- Whether to use chronological or flashback method.
- Name of chapter founding members.
- Name of administrators at the time of founding.
- Name of local organization that became Mortar Board.
- Date of installation plus name of installing officer.
- Name of first advisors and of the first chapter president.

## **MEMBERSHIP CHAIR**

The membership chair is charged with overseeing the new member selection process, the most important role 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.

### **Responsibilities to your chapter**

- Become familiar with the membership selection process.
- Read the Membership Selection Handbook.
- Orient the chapter on membership selection procedures.
- Conduct membership selection.
- Plan and conduct tapping and initiation.
- Conduct an orientation session prior to initiation.
- Orient and turn over all material to your successor.

### **National responsibilities**

- Help complete the Chapter Action Plan (CAP) on or before September 15.
- At least two weeks prior to tapping, carefully complete the Official Membership Report (OMR) and email it to the National Office for approval. After approval, pass the approved 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 contains thorough information on how to prepare for and conduct membership selection, tapping, initiation, and orientation.
- 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.
- Stay in contact with college/university personnel and your advisor to obtain necessary GPA data on potential members.
- Use the help of a membership selection committee to spread the word about membership, gather nominations and applications, and plan the selection meeting.

## **PARTICIPATION AND COMMITTEES**

Action is what sets Mortar Board apart from other 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. People help support what they help create. Be mindful of how you can cultivate active participation from

your members. Here are some things to keep in mind:

- Get the entire chapter involved in decisions.
- Early approval or consensus on programs is important.
- Give everyone a responsibility.
- Examples of committees:
  - Alumni relations committee
  - Membership committee
  - Chapter history committee
  - Public relations/publicity committee
  - Fundraising committee
  - Service to alma mater committee
  - Social committee

## VISIBILITY

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 honorary, but as an honor society that is an integral part of campus life. 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. All of your officers and members should be part of your visibility efforts. Here are some ideas to get you started on publicity planning:

- Honor and feature faculty and staff.
- Find a need on your campus and fill it.
- Promote scholarship, leadership and service events.
- Encourage underclassmen in those same areas.
- Be a prominent part of campus life.
- Make a statement with Mortar Board apparel.
- Make it easy for anyone on campus to find you.

## IMPORTANT DATES

There are a number of important dates for national reports or nomination deadlines. Make sure your entire executive board is aware of these dates:

September 15	Chapter Action Plan due
October 1	Mortar Board <i>Forum</i> submissions due
October 15	CAB applications due
November 15	Alumni award nominations due
January 1	Mortar Board <i>Forum</i> submissions due
March 1	Mortar Board Fellowship application due
March 15	Excellence in Advising nominations due
	Conference registration opens
April 1	Mortar Board <i>Forum</i> submissions due
May 15	Chapter Annual Report due
	Chapter Finance Form due
	Advisor Annual Report due
	Final Official Membership Report (OMR) due
	All fees due
	New Officer Report due
	Chapter Historian Report Due
	Annual chapter award nominations due
	Conference registration closes
July 1	Mortar Board <i>Forum</i> submissions due

## Typical chapter year

Summer - Fall

- Chapter president attends the National Conference.
- Begin monthly chapter meetings and officer meetings.
- Plan scholarship, leadership and service activities.
- Create a plan for membership selection.
- Meet all fall deadlines.

After winter break

- Begin the membership selection process.
- Celebrate national Mortar Board Week.
- Celebrate national Advisor Appreciation Week.
- Complete the Official Membership Report (OMR).
- Tap new members.
- Participate in the Special National Conference by phone.
- Hold orientation for new members.
- Hold transition sessions for new officers.
- Initiate new members.
- Meet all winter and spring deadlines.
- Begin planning for next year.

## ADVISOR EXPECTATIONS

As an 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. Under your guidance, the chapter 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. 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. 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 the *Bylaws*).

- Attend executive board and chapter meetings.
- Attend all new member selection meetings.
- Assist in a thorough orientation for new members.
- Encourage use of parliamentary procedure.
- Assist in chapter programming.
- Review the chapter budget.
- Communicate campus policies and procedures.
- Serve as a sounding board for chapter officers.
- Aid in preserving the continuity of the chapter.
- Be generally available to assist the organization.
- Keep current with Mortar Board news.

- Stay in touch with your section coordinator.
- Maintain contact with the National Office.
- Complete an Advisor Annual Report on or before May 15.
- Aid chapters in identifying future advisors.
- Confer as an advisory board periodically.
- Aid in registering the chapter as a student organization.
- Remind the chapter of deadlines for reports.
- Assist the chapter in finding funding sources.
- Encourage the use of campus and national resources.

## 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. This guarantees a shared responsibility among the advisors as well as the 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 effective in rotating many interested parties through the advising role, and a former advisor may be reelected by the chapter for another term. Alternately, many chapters retain the same advisor for many years. This could be because the advisor has “chapter advisor” in their job description with the institution, or are highly committed to Mortar Board. Many advisors have split the duties of advising among themselves. This method is flexible to encompass the particular programming needs and will not overburden any one advisor. It also allows the sophomore and junior advisors to go through a training period before assuming the senior advisor role. Different models work in different ways, depending on your campus.

## INFORMATION/RESPONSIBILITIES

### General Chapter Operations

Each 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 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. 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 online. One of the most helpful legacies a chapter can leave behind is a clear, consistent record of its operations, successes and failures. Taking time to write a summary report after an event, while not necessarily an anticipated joy, will greatly benefit future chapters, to help keep them from “reinventing the wheel.”

Certain forms are required to be filed by each chapter. These forms are critical to maintain national files and to assist in planning future conferences and goals. All forms are available online. A Chapter Action Plan (CAP) is required each fall to help the chapter plan its year. This form is very helpful in planning out timelines for programming, social activities, fundraising, service projects and membership selection. At the conclusion of the year, the chapter submits a Chapter Annual Report (CAR), revisiting goals and objectives from the Chapter Action Plan and evaluating successes and failures. 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.

## Membership selection

The advisor also plays a critical role in membership selection by securing of the grade point averages of prospective members and by ensuring the confidentiality of this information. Confidentiality is an important aspect of membership selection and includes not only grade point averages but also all discussions held on candidates. While advisors are expected to support and be thoroughly involved in the selection process, they should not present bias in favor or against candidates either before or during the selection meeting.

## 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 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 is to cooperate in the planning of this officer transition. Some chapters distribute a copy of guidelines before electing officers so that all members are familiar with the commitment which must be made by a chapter officer. These guidelines are also appropriate for use in the officer transitions and are adaptable for individual chapter use.

## Dismissal of members

One particularly sensitive issue addressed in the *Bylaws* 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 a strong participation policy be established and monitored on a regular basis, so that noncompliance can be addressed very quickly and effectively.

## Develop your own style

An advisor is a person 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 she/he intends to use her/his 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 an educationally meaningful experience.

## Connect with the National Office

Your Mortar Board chapter likely has 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 officers to submit reports in a timely manner.
- Relay timely reminders and tips from e-newsletters.
- Let your students know about the national conference.
- Join our online communities.

## **FREQUENTLY ASKED QUESTIONS**

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### **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 (OMR) 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 access these records.

### **Who is my section coordinator and how can she/he 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 online. Reach out to your SC throughout the year with questions, concerns or good news!

### **What is the conference fee?**

Each chapter is required to pay the conference fee annually. The fee helps defray a portion of the annual Mortar Board National Conference expenses. This fee helps cover 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.

### **Does each chapter send someone to the conference?**

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. Each chapter is required to send one official delegate in order to meet chapter minimum standards, and is welcome to send additional members for a 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. Should we still complete the form?**

Yes! Mortar Board requires this information to fully evaluate the national organization. Some reports, like the Finance Report, are required for Mortar Board to maintain its federal tax status. Reports 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.

### **I am having problems with a report form. HELP!**

If you encounter a problem, please contact the National Office at 800-989-6266 or [mortarboard@mortarboard.org](mailto:mortarboard@mortarboard.org).

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

Ideally the chapter can find a time that will work for everyone. If they know and can plan on a meeting 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 member can meet with that person to 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 and review meeting Minutes.

### **How do you find an advisor?**

Your campus has staff who work with student organizations. Approach them for suggestions. 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. You can also reach out to chapter or local alumni to gauge their interest in assisting as an advisor or on an advising team (more information on gathering alumni data can be found in the following question).

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

Locating alumni will require a dedicated effort. The National Office is able to provide you with the contact information of alumni either from your chapter or who live in your area (or both). Please submit an Alumni Information Request Form online.

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

It's vital that the chapter select one or two programs, projects, awards, or events that will provide true service to other students and live Mortar Board's purpose. Review the Purpose with your chapter and use it to guide your choices. Select programs that you can really do well, provide high visibility, serve the campus either directly or indirectly and make money or are revenue-neutral. Your budget may be the deciding factor.

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

The Membership Selection Handbook covers everything you'll need to know about selection and membership. Although membership is overseen by a specific officer, it is also one in which the entire chapter takes part, and all officers and advisors should be familiar with the procedures.

### **What does it mean to have a "cleared account"?**

A "cleared account" means that a chapter has submitted 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 at the national conference.

### **How can we know the upper 35 percent of our junior class?**

In order to obtain the upper 35% 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. Some will also assist you by giving you the names of all students who meet that GPA. If you are having difficulty with your school releasing this number, please contact the National Office.

### **How can we possibly consider for membership everyone who meets the academic standards?**

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 membership information distributed campuswide. The key is to begin early. Use of mass email is free as is posting around campus. Call the registrar's office to see if they will send out communication on your behalf.

### **We have a member who never shows up. What can we do?**

First, try to talk with the member about why she or he is not participating. If your chapter cannot establish contact with the member or she or he does not have a valid excuse, 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 voting to remove the member from the chapter. Both of these policies are outlined in our *Bylaws*.