



MORTAR BOARD
NATIONAL COLLEGE HONOR SOCIETY



Passing the Torch: Mortar Board Onboarding & Chapter Transition Guide



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Mortar Board Basics

Contents

About Mortar Board
National Support
Advisors
Key Events & Deadlines
Membership
Chapter Visibility
Fundraising
Service
Tapping
Initiation
Conference

You're in Mortar Board... Now What?



Getting your Mortar Board chapter up and running is an exciting opportunity to **build a vibrant community** dedicated to academic excellence, service, and leadership! This **comprehensive guide** is designed to equip you with the tools and insights you need to **successfully launch and run your chapter**. With clear steps and resources at your fingertips, you'll unlock the potential to **inspire** fellow students, **make a lasting impact**, and form invaluable **connections** with collegiate members and alumni. Dive in, and let's make your chapter flourish together—reach out anytime for support!



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NATIONAL COLLEGE HONOR SOCIETY

What is Mortar Board?

Mortar Board is a national college honor society for juniors and seniors who exemplify **scholarship, leadership, and service**. Founded in 1918, we've been **student-led and student-governed** for over 100 years.

With Mortar Board, one membership creates a **lifetime of opportunities**. Our **one-time national dues of \$100** cover not only your collegiate years but a lifetime of alumni benefits.

Mortar Board has been **chartered on 235 campuses** across the country and has six geographic regions **supported by national volunteers** (Region Coordinators). As the main point of entry to membership, collegiate chapters are the heart of Mortar Board.

The Mortar Board Experience

The Mortar Board experience is not only a collective journey for our collegiate members that unites all members, but it also serves as a roadmap for chapters. We identified five key pillars of the Mortar Board Experience:

- Membership
- National Conference
- Service (to campus and community)
- Campus Visibility
- Fundraising

You'll learn more about these five elements throughout this guide.



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National Office Support



The **National Office's** role is to guide and support our chapters, ensuring both short-term and long-term success. Though the entire National Office will support your chapter, you will work most closely with:

Trish Maxwell, Director of Collegiate Success

Working closely with the Region Coordinators, Trish works directly with chapters to ensure your chapter stays sustainable.

She's your main point of contact in the National Office.

tmaxwell@mortarboard.org

Ben Flox, Membership & Operations Manager

Ben works tirelessly to support your membership efforts, processing and importing candidate lists, sending payment reminders, and ensuring membership records for your members are correct and active.

bflox@mortarboard.org

Kirsten Fox, PhD, Executive Director

As Executive Director, Kirsten serves as your biggest cheerleader and link to the national organization. She works closely with national student reps to ensure the student voice is heard.

kfox@mortarboard.org



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Even More Support!



National Leaders

The **National Vice President's** role is to help guide and support chapters. They work closely with the National Office and Region Coordinators to guide chapters throughout the year.

Region Coordinators are national volunteers who work directly with chapters throughout the year to guide them on national requirements, celebrate their accomplishments, and troubleshoot issues that arise.

Region Coordinators are with your chapter every step of the way. They'll meet with your chapter, share and brainstorm ideas, remind you of national deadlines, and help you accomplish your goals.

mortarboard.org/region-coordinators



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NATIONAL COLLEGE HONOR SOCIETY

Advisors

Though Mortar Board is a student-led organization, advisors provide consistency from one year to the next through their active interest and guidance. Advisors have the experience, knowledge of their institution, and familiarity with the community to guide chapter leaders.

Advisor Responsibilities:

- Meet with chapter (e-board, general meetings)
- Be a resource for campus policies
- Assist chapter with chapter finances and treasury
- Understand the national society and communicate with national office when needed
- Preserve chapter history (minutes, records, archives)
- Help identify co-advisors and/or replacements

Key Action Items for Advisors:

- Obtain an eligibility list for membership (typically in January or early February)
- Guide chapter as it holds selection and initiation
- Ensure chapter has completed its Chapter Annual Report (due May 15) and Chapter Action Plan (due September 30)

Ideas for Finding an Advisor:

- Dean of Students office, Student Affairs/Life office, Honors College, Student Activities/Leadership office
- Well-loved faculty/staff members on campus
- Former Mortar Board collegiate/honorary members who work on campus



MORTAR BOARD
NATIONAL COLLEGE HONOR SOCIETY

Key Events and Deadlines

- **National Conference** - Rotating between in-person and virtual, conference is our flagship event focused on understanding chapter operations, sharing ideas, and networking with other student leaders across the nation.
- **Chapter Action Plan** - This document is your roadmap to a successful year. Complete it as a chapter and your Region Coordinator will provide feedback and ideas. It's due September 30 (October 15 for quarter schools).
- **Special National Conference** - Held virtually in late January, each chapter is required to send at least one student rep to get information and vote on national governance.
- **Recruitment & Selection*** - You recruit applications and select members who embody our ideals - scholarship, leadership, and service. We have a national application and email templates to lighten your load. Once selected, chapters submit the Candidate Request for approval.
- **Mortar Board Week** - Mortar Board's founding day is February 15! The week surrounding February 15 is filled with national and chapter programming, recruitment events, and more.
- **Public Tapping** - Tapping is the special way you let your members know they have been selected. Typically tapping takes place in person to raise awareness about Mortar Board.
- **Initiation & Officer Transition** - Once newly-selected members are initiated into Mortar Board, you'll hold officer elections and meetings to help set up the next set of leaders for success.
- **Chapter Annual Reports & Collegiate Awards** - Due May 15, annual reports provide a recap of what you accomplished and information for next year's group on leadership, finances, events, and more. You can also apply for collegiate awards, which have the same deadline.

**Chapters are required to do selection in the spring, but you may also choose to hold selection in the fall as well.*

mortarboard.org/timeline



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NATIONAL COLLEGE HONOR SOCIETY

Membership

As a membership-based organization, Mortar Board relies on its members for existence. They are the best part of our Society. Membership begins with recruitment and involves the traditions of selection, tapping, and initiation, while also incorporating strong transitions between classes.

Recruitment

Being visible on campus is key in recruiting the new class. Start in early fall with events like involvement fairs, tabling, partnering with other clubs, and more!

Application

Chapters recruit members through applications, reviewing the candidate's contributions to scholarship, leadership, and service. A national application is available.

Selection

The biggest responsibility of current members is to select new members. Chapters should be at least 15 people, but can be much larger depending on your chapter.

Candidate Request

Once selected, notify the National Office of your candidates on the Candidate Request. We'll use this to create their account, collect payment (if you choose), and produce their certificate/pin.

Public Tapping

Tapping is how you let students know they've been selected. It can be in a classroom (with permission), in a public place, or in a club meeting. It's a special and memorable experience.

Initiation

This is the formal initiation into the society where members receive their pins and membership certificates.

Orientation & Officer Elections

It's important to share information about Mortar Board and your chapter with new members. Also talk about officer positions and hold elections for next year's leaders.

Officer Transition

Don't let your hard work go to waste - be sure to transition next year's group. Share resources, passwords, and meet to discuss each position and tips for success.



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NATIONAL COLLEGE HONOR SOCIETY

Chapter Visibility



Visibility is key to a chapter's success. People won't want to join or support Mortar Board if they don't know about you.

Chapter visibility is crucial for the success and sustainability of Mortar Board chapters, as it attracts new members, fosters campus partnerships, and enhances the organization's reputation. Ideas for increasing chapter visibility include:

- **Tabling** at campus fairs & events
- Engaging **faculty, staff, and alumni**
- Creating **posters and flyers** around campus (with permission)
- Having a presence on **social media** & the university **website**
- **Collaborating** with other clubs/offices on campus
- Having Mortar Board **merch**
- Hosting **guest speakers** during meetings and events
- Creating **event traditions**

We have printable marketing materials, social media graphics, branding resources, and ideas for increasing your visibility on our website. Visit mortarboard.org/chapter-visibility



MORTAR BOARD
NATIONAL COLLEGE HONOR SOCIETY

Visibility Through Recognition



A great way to increase visibility is through **faculty, staff, and student recognition initiatives**. Honor freshmen and sophomores (a.k.a. future Mortar Boards) who demonstrate the ideals of scholarship, leadership, and service, or thank faculty and staff members who make an impact on your members. The more people you honor and connect with, the more allies and future members you have on campus.

Each chapter can award up to three **honorary memberships** per year to faculty and staff who uphold the values of scholarship, leadership, and service. It's a great way to help key campus officials learn about Mortar Board and support your chapter.

Chapters can also increase visibility and recognize others through peer recognition programs, shout outs on social media or in campus newsletters, spotlight awards, and public tapping.

Learn more at mortarboard.org/recognition



MORTAR BOARD
NATIONAL COLLEGE HONOR SOCIETY

Fundraising



Fundraising is crucial for Mortar Board chapters as it enables them to pursue their mission, make a more substantial impact on campus and in the community, and ensure chapter sustainability year after year. By fundraising, Mortar Board chapters gain the resources they need to fulfill their mission and make lasting contributions to their members, campuses, and communities.

Fundraising Ideas:

- Blossom Express flower sales at graduation
- Professional headshots
- Mortar Board Week (or Valentine's Day) flower or candy sales
- Dine for dollars
- Cookie, candy, or bake sales

For more info and ideas, visit
mortarboard.org/chapter-fundraising



MORTAR BOARD
NATIONAL COLLEGE HONOR SOCIETY

Service to Campus and Community

In alignment with our core mission, service remains central to the Mortar Board philosophy. Our chapters are dedicated to serving their alma maters and extending their impact into local communities through various local and global outreach initiatives. Most chapters do at least one service project each semester.

To learn more or get service project ideas, visit:

mortarboard.org/service



MORTAR BOARD
NATIONAL COLLEGE HONOR SOCIETY

Tapping

A tradition dating back over a century, tapping is a public practice by which members notify new members that they have been selected for Mortar Board. Ideally, tapping is performed in a public setting to promote recognition and boost Mortar Board's campus presence.

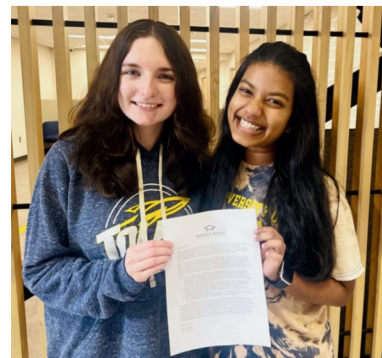
Methods of tapping will vary across chapters, but be sure to make this experience special for new members!

Tapping in Class:

- Be sure to secure permission in advance
- Speak about Mortar Board to expand recognition
- Explain why members are being tapped
- Consider providing next steps (orientation, initiation, etc.)

Tapping Outside the Classroom:

- Solo tapping (tapping members individually)
 - Meetings, sports practices, jobs, etc.
- Group tapping (tap everyone together in a public location)
 - Balloons, refreshments, dignitaries, etc.
 - Tap with a flower or certificate



mortarboard.org/tapping-and-initiation



MORTAR BOARD
NATIONAL COLLEGE HONOR SOCIETY

Initiation

The initiation ceremony is an opportunity to recognize new members, as well as honor outgoing members for their accomplishments. Chapters are encouraged to make their initiation ceremonies personalized and unique while abiding by Mortar Board traditions.

Here are some key components and guidelines to consider when planning your chapter's initiation:

Practice

- Practice the staging and wording of the ceremony in advance.
- If possible, ensure that outgoing members are present during rehearsal to walk through the program.

Recommended Attire

- Caps and gowns
- Business casual

Participants

- Chapter officers
- Alumni members
- Initiates
- Current and outgoing members
- Campus dignitaries
- Guests (faculty, staff, families)

Music

- Soloist or small choir
- Piano or other accompanying instrument
- Song recording(s) from Mortar Board website if instrumentation unavailable



Initiation (cont.)

Regalia and Program

- Flowers or centerpiece
- Ribbons with pins fastened to them
- Certificates
- Silver candlesticks
- Gold candles
- Chapter roll book
- Writing pen
- Printed program (contains order of service, leaders, and names of new/old classes)

Resources

- Initiation Handbook
- The Torch (Mortar Board's poem)
- Mortar Board Ode (*recording and sheet music available*)
- Thy Ideals (*recording and sheet music available*)

Initiation Structure

- Processional
- *Mortar Board Ode*
- Welcome and keynote
- National and chapter history
- Reading of chapter names, signing of chapter roll
- *The Torch*
- Acknowledge outgoing officers
- *Thy Ideals*
- Recessional

Additional Tips

- When calling new initiates forward, give a brief summary of why candidate was selected for membership
- Play an accompanying slide show of each candidate to coincide with their name being called
- Have a chapter member serve as an official photographer to take photos for Mortar Board archives

National Conference

The Mortar Board National Conference is our flagship initiative, serving as a crucial platform for members to share ideas, foster learning, and build networks across chapters. As a student-governed society, the National Conference is essential for making amendments, resolutions, and recommendations on national governance. Chapter attendance is important not only for the formal business aspect, but also for the opportunity to build bonds with other members and the Society. Currently, the National Conference is held in person every even year, with a virtual conference in the odd years.

Learn more at mortarboard.org/conference



MORTAR BOARD
NATIONAL COLLEGE HONOR SOCIETY



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NATIONAL COLLEGE HONOR SOCIETY

Chapter Essential Info

*To add your chapter-specific
information in the sections below,
download the extended
Chapter Transition Guide:
**[mortarboard.org/officer-and-
advisor-transition/](https://mortarboard.org/officer-and-advisor-transition/)***

Chapter Information

Chapter History

Membership Requirements

Logistical Details

Officer Roles and Responsibilities

Contacts and Campus Partnerships

Candidates, Tapping, and Initiation

Important Info on the Mortar Board Website

Mortar Board Website:
mortarboard.org

On our Resources Page, you can find:

- Chapter visibility resources
- Email templates and pre-made social media posts
- Programming ideas and best practices
- Tips and tricks for chapter operations
- Initiation Script
- Governing Documents (national Bylaws)
-and more!

mortarboard.org/resources



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NATIONAL COLLEGE HONOR SOCIETY

**We wish you all
the best!
You can do this!**



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