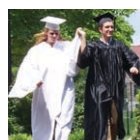


# Membership Selection Handbook



## **Mortar Board National College Senior Honor Society**

*Scholars...Chosen for Leadership...United to Serve*

Mortar Board National Office  
1200 Chambers Road, Suite 201  
Columbus, OH 43212  
Phone: 800-989-6266  
Fax: 614-488-4095  
mortarboard@mortarboard.org  
www.mortarboard.org

## ***Membership Selection: A Chapter Privilege and Responsibility***

The selection of a new chapter is the most important task a Mortar Board chapter completes. Doing it well is essential, and planning is the key. Time is not your enemy – a lack of time caused by a lack of early planning is!

This handbook is designed to be an aide as you choose new members. You will find information to guide you through each step of the membership selection process. You can also find supplemental materials such as an initiation script, Mortar Board logos, and sample correspondence on our national Web site. Please contact the National Office with any questions or concerns you have regarding membership selection.

### **TABLE OF CONTENTS**

Membership Selection Timeline .....	3
Membership Selection Committee .....	4
Membership Selection Plan.....	4
Selections .....	4
Selection by Consensus .....	4
Sample summaries of selections processes .....	5
Selections criteria examined.....	6
Blind selections .....	7
Encouraging diversity .....	7
Timing.....	7
Special membership considerations.....	8
Honorary membership .....	8
Gift memberships .....	9
Official Membership Report.....	9
Instructions for completing the Official Membership Report.....	9
Submitting the Official Membership Report .....	9
Information needed by the National Office .....	9
Official Membership Report: Completing part three and payment of fees.....	10
Tapping.....	10
Tapping tips .....	11
Initiation.....	11
Orientation.....	11
Whose job is it? .....	11
What are the goals of orientation?.....	11
Orientation formats .....	11
Suggested orientation agenda .....	12
Chapter and officer transition.....	12
Group development discussions.....	13
Building diversity and teamwork.....	13
Membership FAQ.....	13
Selection by Consensus mock selections guide.....	15

## MEMBERSHIP SELECTION TIMELINE

The first step in executing a quality selections process is coming up with an effective timeline for your chapter. Below is a suggested timeline for selections. This schedule is designed primarily for colleges/universities on semester schedules. Those on quarter/term systems will especially need to adapt their dates. But keep in mind that national bylaws require each chapter to tap members no sooner than six weeks after the conclusion of the fall grading period and no later than six weeks before the last day of classes for the school year. The bylaws also stipulate that chapters must hold their initiation ceremony at least four weeks before the last day of classes for the school year. See the *Standing Rules of Mortar Board*, section one, part C for more details.

<i>Target Date</i>	<i>Activity of Chapter/Membership Committee</i>
Early October	<ul style="list-style-type: none"> <li>• Contact registrar’s office concerning confirmation of grades/class standing process</li> <li>• Form membership committee</li> <li>• Familiarize committee and chapter with bylaws/standing rules relating to membership selection</li> <li>• Discuss Honorary Membership for appropriate campus/community persons</li> <li>• Finalize chapter dates; secure guest speaker for initiation</li> <li>• Consult advisors</li> <li>• Secure from current chapter members a listing of campus organizations to which they belong</li> <li>• Compile list of all other appropriate campus organizations, including organizations under-represented in current chapter</li> </ul>
Early November	<ul style="list-style-type: none"> <li>• Print posters, begin publicity of Mortar Board selections process</li> </ul>
Mid November	<ul style="list-style-type: none"> <li>• Send publicity to deans and organizations (include information sheet/nomination form), put up posters with forms attached, reserve rooms for selections meeting, orientation, and initiation (if not already done)</li> </ul>
Before Winter Break	<ul style="list-style-type: none"> <li>• Advertise in campus media, send e-mails</li> <li>• Order medallions and cords from National Office</li> <li>• Submit Membership Selection Plan to National Office</li> </ul>
Early January	<ul style="list-style-type: none"> <li>• Upon return to campus, run through a practice Selection By Consensus process at chapter meeting with advisor present</li> <li>• Send reminders of nomination/information sheet deadlines to organizations</li> <li>• Place advertisement in campus media</li> </ul>
Mid January	<ul style="list-style-type: none"> <li>• Deadline for nominations/submission of information sheets (allowing for first term grades to be posted)</li> <li>• Members read all information sheets on their own time (on reserve at available location)</li> <li>• Meet with registrar’s office to confirm GPAs and class standing for candidates</li> </ul>
Late January	<ul style="list-style-type: none"> <li>• Chapter meeting to select new members and Honorary Members (advisor present)</li> <li>• Organize public tapping</li> <li>• File Official Membership Report (“OMR,” available online at <a href="http://www.mortarboard.org">www.mortarboard.org</a>) PRIOR to tapping</li> <li>• Send advisor signature form verifying process to National Office</li> </ul>
Early February	<ul style="list-style-type: none"> <li>• Tapping during Mortar Board Week (pending National Office OMR approval)</li> <li>• Letters/invitations to initiation mailed to faculty, families (after candidate acceptance of membership), section coordinator or any other local Mortar Board alumni</li> <li>• Membership materials received by advisor including pins, certificates, membership booklets, initiation and orientation materials</li> </ul>
Late February	<ul style="list-style-type: none"> <li>• Orientation meeting of old and new chapters, collection of membership fees, distribution of membership materials, discuss activities/traditions, participation requirement</li> <li>• Mail membership fees and finalized, completed OMR to National Office</li> </ul>
Early March	<ul style="list-style-type: none"> <li>• Outgoing chapter meeting to plan and rehearse initiation ceremony</li> </ul>
Late March	<ul style="list-style-type: none"> <li>• Initiation of new members</li> <li>• Transition meeting of old/new chapters (not just officers): new chapter elects its officers and advises new chapter president to register for the national conference</li> </ul>
Early April	<ul style="list-style-type: none"> <li>• New chapter meets to generate ideas for the next year, get summer and e-mail information of members</li> </ul>

## MEMBERSHIP SELECTION COMMITTEE

Many chapters organize a membership committee to spearhead their selections 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 committee. 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 selection 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 10-15% of your chapter members.

In addition to coordinating the overall membership selections process, the membership committee should pay close attention to the following:

- o Emphasize a fair and just selections process, free from personal bias
- o Encourage the chapter to maximize its chapter size by selecting a full class (a maximum of 50 members or 1.5% of the student body with junior standing, whichever is greater)
- o Make the process as smooth as possible for the chapter by thoroughly educating all members on the selections process and organizing all applications/ nominations received
- o Adequately advertise membership selections to your campus community in order to be sure that all eligible juniors have the opportunity to inquire about membership

While the committee is the coordinating body for selections, led by the chapter's membership chair, it is important that each and every chapter member be involved in the selection of a new chapter. Make selections meetings, initiation, and orientation for new members mandatory events for everyone in your chapter.

## MEMBERSHIP SELECTION PLAN

Each chapter is required to submit a Membership Selection Plan (MSP) to the National Office by December 15. This allows the National Office to maintain the integrity of the Mortar Board selections process nationwide and offer suggestions to chapters as needed.

Use the above Membership Selection Timeline as a resource when completing the dates in your MSP. Even though your school may not be on a traditional semester system, it is important to still complete the MSP before the deadline and to also keep in mind the national guidelines on the timing for tapping and initiation. If you need help with your MSP, contact your section coordinator or the National Office. The MSP can be found online at [www.mortarboard.org](http://www.mortarboard.org).

## SELECTIONS

Selecting a new Mortar Board chapter is an important task to be taken seriously. Your chapter will need to consider how to identify viable new members, how to get the word out to your campus, and how to collect applications and nominations. After all of this is done, you will finally be able to hold your selections meeting. As you spend time selecting new members, 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 accomplishments in the areas of scholarship, leadership, and service rather than selecting students for personal reasons. All chapter members should be involved in this process in order to ensure its success.

### *Selection by Consensus*

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Mortar Board chapter select new members using a model called Selection by Consensus. This model utilizes multiple rounds of voting and requires candidates to be approved by 80% of the general membership. Chapters must select no more than 50 candidates or 1.5% of the junior class (whichever is higher), and no fewer than 15 candidates or 10% of the junior class, (whichever is less).

#### **Round one:**

During the first round of voting, chapter members should vote for all those individuals that they think merit selection; this number should

be no more than 50 and no less than 15. This round should be completed without any discussion on the candidates. After the round is completed, all those candidates receiving at least 80% approval from the membership are considered approved for membership in Mortar Board and should no longer be voted on.

### **Succeeding Ballot Rounds:**

After round one, the group should hold discussions on the remaining candidates regarding the selection criteria (scholarship, leadership, and service). Remember that the group is not required to discuss every candidate, nor is everyone required to speak on every candidate discussed.

After group discussion of the remaining candidates, conduct another round of voting. The maximum votes ones may cast are limited to 50 minus the number of those already selected; the minimum number should remain 15. The names on the list of candidates are never eliminated and may be considered more than once in successive rounds (i.e. each candidate who is not voted in with 80% of the vote may be reconsidered in each succeeding round until no more rounds remain). After each voting ballot/round, the names of those who received the required percent of votes are declared selected for membership into Mortar Board.

Discussion and balloting/rounds continue until the chapter does not select anyone on three consecutive ballots/rounds. At that time, the selection process shall be considered ended.

At the end of this handbook is a sample Selection by Consensus document. Utilize this as a guide until everyone in your chapter is familiar with the process.

Make sure your advisor is present at selections, and if you have any questions about procedures or regulations please contact your section coordinator or the National Office.

### ***Sample summaries of selections processes***

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The following suggested models are provided, though not complete, knowing that adaptations may have to be made to suit individual campus situations.

SELECTION MODEL A: This model refers especially to chapters unable to obtain a list of individuals who meet GPA requirements or chapters who want to use a nomination form. With both cases it is important that chapters use multiple methods of publicity to generate campus awareness. Procedures include:

1. Obtaining written recommendations from:
  - a. Faculty members
  - b. Academic advisors and administrative staff
  - c. Presidents and/or advisors of all campus student organizations
  - d. Appropriate community organizations with substantial student affiliation
  - e. Community leaders

*Note: Those who are requested to write such recommendations should be provided with an understanding of the honor of Mortar Board, its meaning and significance.*

2. Distributing nomination forms/applications to recommended candidates. The purpose of this would be:
  - a. To provide an opportunity for students to document activities, interests and attitudes
  - b. To obtain individual GPAs by using the signed information sheets as a release form allowing the membership committee to obtain grade information

*Caution: Do not turn nomination forms/applications into a requirement for membership by limiting consideration to only those who return them. Try to make sure you gather as many interested candidates as possible from all over campus.*

*Note: Mortar Board does not endorse the use of a processing fee, which could be construed as a condition for membership consideration.*

SELECTION MODEL B: This model allows tapping to remain a secretive honor in that the candidate has no previous knowledge of his/her consideration for selection into Mortar Board. This selection procedure would include:

1. Making a list of outstanding leaders on your campus by obtaining written recommendations from:
  - a. Faculty members
  - b. Academic advisors and administrative staff
  - c. Presidents and/or advisors of all campus student organizations
  - d. Appropriate community organizations with substantial student affiliation
  - e. Community leaders
  
2. Obtaining the GPAs of those candidates in the upper 35 percent of the junior class or who have a minimum of a straight B average (whichever is higher) or who meet the chapter's standards (if the standard is higher than the national minimum).
  - a. The registrar and/or dean of students can assist you in securing such a list.

*Caution: Be consistent in establishing a basis for the final list. Total credits do not necessarily determine class standing. Candidates must hold junior standing or above. There is no maximum number of hours achieved, as long as the candidate is an undergraduate. It is important also to know the projected date of graduation so that the individual selected for membership will be able to serve a full term (at least one school term, excluding summer, of active membership prior to graduation).*

### **Selection Criteria Examined**

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The following are some suggestions for examining selection criteria. They may be useful to the chapter in helping to make the three terms 'scholarship, leadership and service' more meaningful. These suggestions are not intended to be in any way limiting or all-inclusive.

#### **Scholarship**

A discussion of this area should be aimed at examining qualities of scholarly value beyond the grade point average. There is a qualifying average that is required (3.0 on a 4.0 scale, or the upper 35 percent level, whichever is HIGHER), but grades alone do not present the quality of depth of "education" a person has received. The following are for your consideration:

- o Is there a real intellectual curiosity and interest in ideas?
- o Is there an interest in cultural offerings on campus?
- o Does this person take courses to widen his/her scope or only to meet requirements?
- o Does he/she actively support departmental and other academic programs?
- o Do attitudes of genuine scholarship extend to areas beyond the classroom to campus concerns and problems in life?

#### **Leadership**

The distinction between office-holding and leadership should be examined in this area. It is important to look beyond leadership in prestigious activities and to seek out those other leadership areas not so evident on the campus or in the community. Direction to discussion might be gained by answering these questions:

- o Does this person offer an example for others by displaying humility and sincere leadership - not just for the sake of prestige?
- o Is this person discriminating in the cause for which he/she leads, or does he/she just lead in order to be at the head of something?
- o Is this person skillful in developing the talents of those whom he/she leads?
- o Does he/she base leadership skills on sound thinking and on the good thinking that comes from the group?
- o Does this person exemplify loyalty and trustworthiness to the causes he/she leads?
- o Is this person recognized by the campus as a capable leader and sought for special jobs?
- o Is he/she creative in leading for new and different ideas?
- o Is this person able to question his/her actions objectively?
- o Does he/she share credit for group accomplishments with the group?

#### **Service**

The desire to serve is laudable, but hard to judge in another. One chapter has defined service as cooperation, generosity and responsibility. The following questions may help in the discussion of this area:

- o Does this student serve the campus/community by being an example of character and integrity?
- o Does he/she seek jobs that need doing, whether or not he/she will gain publicity?



- o Does this person carry through on things he/she undertakes or make a big splash and then forget it?
- o Is this student sensitive to the needs of the campus and active in trying to do something about them?
- o Is he/she positive in her attitude towards his/her school, faculty and living unit, in campus organizations, in the performing arts, in student government, in service projects, in campus programs and sports, in discussions for campus betterment, in student/faculty committees, in campus relations and in the community?

**In summary:**

A candidate should meet the three qualifications qualitatively and quantitatively. No one will be perfect. Many of the qualitative judgments must be accepted from others who should know. The quantitative judgments will be a matter of record. Decisions will have to be based on fair assessment of the campus situation and the individual student. Impartial, unprejudiced decisions are called for, with full awareness of the honor you are about to confer and the good to the campus which the new chapter will serve as Mortar Board.

***Blind selections***

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If your chapter chooses to use a blind selections process, it should do so with caution. While this works well for some chapters it does not serve the interest of others. Blind selection can work to eliminate personal bias and allow students to be judged solely on the information contained in his/her application. But, blind selections can also give undue advantage to a student who excels at representing him or herself on paper. Additionally, a chapter cannot know which individuals have not been considered unless they know which individuals HAVE been considered; therefore a blind selections process virtually negates the effectiveness of a nominations process.

Do not enter into using a blind selections process without being informed. Please consult with your section coordinator and the National Office who can give you advice on how to proceed and connect you with others who have used the process in the past.

***Encouraging diversity***

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Past national conference delegates have noted that diversity and multiple perspectives are two of the great strengths of Mortar Board, Inc. and have encouraged Mortar Board chapters to formulate a nondiscriminatory and unbiased selection process (*Bylaws*, Article I, Section 1-H).

Chapters are encouraged to promote diversity in selecting new members by:

- o Notifying all prospective candidates of their eligibility for membership even if their GPA is borderline. The chapter may petition for a scholarship exception. If your chapter budget does not allow for a mass mailing, use a variety of additional publicity methods. This can be accomplished by using e-mail, mailing to on-campus students and to those off-campus due to study abroad, internships, commuting and/or non-traditional status.
- o Personally contacting eligible candidates who may not know about Mortar Board.
- o Requesting nominations from faculty members, academic advisors, advisors to student organizations and others who have frequent contact with potential candidates.
- o Not limiting consideration for membership to candidates who return nomination forms, recommendations or other forms.
- o Personally contacting diverse groups on campus, co-sponsorship of events with different cultural or theme-related groups or simply giving these groups information about Mortar Board membership
- o Programming throughout the year that reflects diversity will enhance your ability to recruit a diverse group of new members in the spring!

***Timing***

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The Selection by Consensus process can be time-consuming if your chapter is not organized and determined. Make sure you have held at least one practice session with all of your members before the actual selections meeting, and be sure that all members have read all applications and nominations up for consideration prior to the meeting.

In addition to being organized your chapter may decide to make some of the following considerations, based on how efficient your selections meeting is:

- o Stipulate a cap on the amount of time allowed for discussion of each candidate
- o Encourage students to “table” discussions of candidates who are controversial
- o Emphasize that everyone does not need to speak about every candidate, and that every candidate does not need to be

discussed

- o Maintain fairness throughout the process even towards the end so that every candidate is treated equally
- o Strive to meet your maximum membership number
- o Utilize an instructional document which must be read to all members in attendance at the beginning of the selections meeting outlining procedures, expectations, and requirements

## ***Special membership considerations***

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Your chapter will most 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**

- Definition: 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.)
- Please make every effort in planning the selection process to publicize Mortar Board to these students.
- Please plan selections early so these students can have adequate time to accept or refuse membership.
- If the candidate's absence is for the first term and that term only so that her/his grades are available with the others, he/she may be selected and initiated.
- If the candidate's absence is for a term in the latter part of the year so that her/his grades are not available, he/she may be selected. However, the announcement of the selection and initiation shall be deferred, subject to review of grades and her/his return to the selecting school.
- If the absence is for an entire school year, the selection shall not be announced until the candidate's return. Initiation may be deferred until fall, but the initiation fee must be paid with the other new member fees. The selection in the spring of the candidate's junior year is subject to academic verification at the time of actual return to campus.

### **Transfer students**

- *Bylaws*, Article I, Section 1, states that an active member of Mortar Board, Inc. who transfers shall be accepted on the campus to which he/she transfers and given privileges of an active member.
- Standing Rules 1, K directs chapters to make a special effort to obtain information about previous college records of transfer students.

Exceptions may also sometimes be made in regards to candidate GPA and chapter size. All exception forms are available on the Web site; explanations of those available appear below.

Scholarship: When a candidate's average deviates from the minimum GPA requirement set and used by the selecting chapter.

Special Selection Situation: When a candidate is eligible for a selection exception for an unusual situation which seems reasonable, but which is not covered in the *Bylaws*.

Chapter Size: Any chapter may petition the National Office for more than 50 members, or 1.5 percent of the student body with junior standing - whichever is greater, or less than 15 (or 10 percent of the student body with a junior standing) members.

## ***Honorary membership***

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Honorary membership is covered in the *Constitution*, Article II, Section 5; *Bylaws*, Article I, Section 6; and *Standing Rules* 1, Q and 10, A.

- This unique recognition is reserved for those individuals who have made a notable contribution over a period of years and whose influence has extended beyond the university or college. Candidates for honorary membership must be approved by the National Office.
- Petitions and supporting documentation must be submitted to the National Office at least four weeks before tapping. (Use appropriate form.)
- Names of persons being considered should be kept confidential (i.e., the nominees especially should not know of the nomination.)
- The honorary membership fee of \$15 is to be paid by the chapter and the name and address of the person is to be included on the OMR.
- The honorary member is considered a regular member and may participate in chapter activities as an active member if he or she chooses. At initiation, honorary members will receive a certificate, pin and Membership Booklet. Your chapter may wish to



purchase a medallion or honor cords to honor this person as well.

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

- Have this individual's contributions been above the expectations of the position he/she occupies?
- Has this person's impact extended beyond the college or university?
- Is the chapter considering this person because of objective reasons that make them qualified for honorary membership or because of an emotional tie the chapter has to the person? Many chapters form relationships with members of the university that are good individuals, but not representative of all three ideals of the organization. For individuals that members wish to recognize, but who do not meet the standards of Mortar Board, there is a Chapter Citation. Please consider awarding a Chapter Citation to those outstanding persons whom your chapter wishes to recognize, but for whom the category of honorary membership is not appropriate. Contact the National Office for Chapter Citation certificates.

### ***Gift memberships***

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The Coral V. Stevens Gift Membership is explained in the *Bylaws*, Article XII, Section 2; and Standing Rules 10, C.

- One gift initiation fee may be granted in each chapter in case of financial need. It may be awarded to one or divided among several. The recipients are to be selected confidentially by the chapter president and administrative officer of the school or chapter advisor.

## **OFFICIAL MEMBERSHIP REPORT (OMR)**

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### ***Instructions for completing the Official Membership Report***

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The Official Membership Report (OMR) is important because it provides Mortar Board, Inc. with the name, permanent address, grade point average, expected graduation date and other information about new members so that their eligibility can be approved by the National Office and the data recorded for the permanent records. The Official Membership Report is to be submitted online to the National Office.

### ***Submitting the Official Membership Report - detailed instructions online***

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- Contact the National Office for your chapter's online passcode if you don't already know it
- Access the online Official Membership Report from the Chapter Resources section of the Web site at [www.mortarboard.org](http://www.mortarboard.org) and follow the links for report forms to the online OMR.
- Enter your chapter's passcode to gain access into Part I of the OMR.
- Fill out your chapter's general information in Part I.
- Fill out the requested information on the candidates in Part II and submit the information for approval to the National Office. The National Office will either e-mail or call you or the Senior Advisor within 48 hours with approval to tap your new members or to notify you that information is missing. \*Please note: once you have submitted the information in Part II online, you cannot go back and make changes. To make changes, you must contact the National Office.
- Once approval is granted from the National Office, you will have access to Part III of the OMR, which allows the treasurer to review all candidates and designate the final status of each candidate once initiation has been completed and fees have been collected. After completing Part III and submitting it, you must print out a copy of Part III and submit it with the membership fees. A summary of the fees owed to the National Office will be generated after Part III of the online OMR has been submitted. You should print out the invoice to include with your final OMR and membership fees to be sent to the National Office.

### ***Information needed by the National Office***

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- Name of school and chapter
- Date of tapping
- Date of initiation
- Advisor(s) e-mail to National Office affirming that the proper selection procedures have been followed.

- Minimum GPA requirement for candidates (If the GPA your chapter uses for selection exceeds the scholarship requirement as stipulated in *Bylaws*, Article I, Section 2, the GPA standard selected must be approved annually in writing by the National Office.)
- Name, address, phone number and position of person (usually an advisor) who will receive the membership pins, certificates and booklets and will act as a contact should there be any problems with the chapter's account.
- Candidate report (persons selected for tapping):
  - Last name of candidate
  - First name of candidate
  - Middle name or initial of candidate (include birth names for married female)
  - Permanent home address and phone number (not school address)
  - GPA (attach written verification of scholarship eligibility if GPAs are not available)
  - Planned month and year of graduation
  - "M" for male, "F" for female
- If more than 50, or 1.5% of the student body with junior standing - whichever is greater, or less than 15 candidates were selected, contact the National Office to request a selection exception.
- The person preparing the OMR must provide full name, date and telephone number where he/she may be reached in case of questions.

### ***Official Membership Report: Completing part three and payment of fees***

After you have determined which of your tapped members will be accepting their membership in Mortar Board, you will need to complete the OMR to notify the National Office who has paid and been initiated, who has refused membership, and who is abroad. When the National Office has verified the OMR, the advisor and membership chair will be notified by e-mail. Part III of the OMR is then opened for the treasurer to complete for your chapter.

The membership chair and the treasurer should work together on the following:

- Check that the candidate has paid the \$60 membership fee and then was initiated in the ceremony. Under no circumstance should a candidate be initiated before the membership fee has been paid.
- Check the appropriate line for any candidate who refuses membership.
- If a candidate or candidates are to receive a Coral V. Stevens gift membership, the chapter treasurer must be notified. No \$60 fee is submitted to the National Office.
- If a candidate is not on campus, he or she still must pay the \$60 membership fee and can be initiated upon return to campus in the fall. Make sure this is included in the information sent to the students when they are notified of their selection.
- If you have an honorary membership(s) that has (have) been approved by the National Office, include the \$15 fee with the chapter check for new members' fees.
- If you have any continuing seniors, indicate their names on the OMR and include the \$25 fee with the check for new members' fees. (They do not count in the maximum/minimum chapter size!)
- The conference fee of \$150 should also be included in the chapter check for all membership fees, if possible.
- When you have designated the status of every candidate on the OMR, submit the OMR online and print an invoice and summary to mail with only one check from your chapter or school, a cashier's check or a money order for fees to the National Office, 1200 Chamber Road, Suite 201, Columbus, OH 43212.
- Your account must be cleared within one week following initiation of your new members, or your chapter will be placed on probation

## **TAPPING**

How were you notified of your acceptance into Mortar Board? Could it have been done better?

Tapping must be done in person unless physically impossible. Get creative; one chapter tapped an abroad student last year using a YouTube video.

Many chapters make tapping very visible on campus - dressed in cap and gown and carrying lighted candles, chapter members "tap" new members in classrooms and present them with a scroll giving information on where and when to meet for a formal orientation. Tapping should always be done in person. (Check with faculty before you tap in class.)

Officially "tap" the members using a slight tap on the head or shoulder with a mortarboard. Is there a special location on campus that you

can use to begin your own tapping tradition?

## ***Tapping Tips***

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- Clearly coordinate the tapping process with your chapter members. Assign current members to new members so that no one gets tapped twice and that no one gets overlooked in the process.
- If you allow for a week to tap new members, you can ensure that you will have plenty of time to tap everyone.
- If you plan on tapping during a class, always contact the instructor prior to tapping for approval.
- You can make the tapping extra special by taking the new members such things as flowers or scrolled information on the orientation or initiation.
- Keep a master tapping list in an accessible area on campus that current members can mark once they have tapped each member - this way everyone is aware of who has and has not been tapped - if you wish to congratulate a new members, be sure to check the tapping master list first!

## **INITIATION**

Make this a special ceremony. The complete text for the ceremony is included with other membership materials and is also available on our Web site.

- Locate caps and gowns for both the outgoing and incoming members
- Use the lighting of candles to signify the passing of the torch to the next chapter
- Distribute copies of the initiation ceremony to all those with speaking parts. Practice the ceremony, the songs, and the speaking parts so that it will be conducted with dignity
- Arrange for microphones if necessary
- Make rain plans if you are having an outdoor event
- Invite faculty and administrators. Perhaps have an invited speaker
- Invite your section coordinator or a nearby National Council member
- Invite local alumni to the initiation ceremony and have an alum initiate the outgoing members as alumni members
- Serve refreshments following the ceremony

## **ORIENTATION**

New member orientation is vital to the success of the chapters and national organization. Orientation is required through the *Bylaws* and the Chapter Minimum Standards.

### ***Whose job is it?***

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The outgoing president is responsible for seeing that orientation occurs. However, many chapters give this responsibility to the Membership Committee, which coordinates selection, tapping, orientation, initiation, officer elections, and chapter transition. Each of these facets is equally important. The Officer and Advisor Handbook has details on all of these activities.

### ***What are the goals of orientation?***

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- Inspiration and motivation; development of new members' pride in being part of Mortar Board
- Team building
- Knowledge about Mortar Board nationally
- Knowledge about the local chapter's projects, tradition, and structure
- Development of the commitment to active membership in Mortar Board

### ***Orientation formats***

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- Retreats
- Session at the home of advisors or alumni
- On campus with a meal or refreshments

- Include current members to share experiences

### Ineffective orientation formats:

- Quick meetings with no group interaction and a lecture format

### *Suggested orientation agenda*

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Use the Membership Booklet as an orientation workbook.

A. Icebreaker - Team building and “get-to-know-you” exercises

B. National Organization

- Show video (call National Office if you need one)- cost \$15
- Purpose: Preamble
- History: How and why it was started
- Student-governed: The *Constitution, Bylaws*, Standing Rules, Resolutions & Recommendations; National Conference
- Duties of National Council and section coordinators
- National Office and services
- National Project: “Reading is Leading.”
- National Foundation: Purpose, fellowships, and chapter project grants. Mortar Board items for purchase.
- Publications: Membership Booklet, The Mortar Board Forum, Mortar Board Ink, Officer & Advisor Handbook.

C. Local Chapter

- History & traditions
- Activities & programs
- Job descriptions of officers and advisors
- Area alumni and alumni interaction

D. Advantages of Membership

- Recognition for achievements in all three areas: scholarship, leadership, and service
- National affiliation
- Lifelong benefits and friendships
- Eligibility for Foundation graduate fellowships
- Opportunity for leadership development
- Association with national alumni

E. Expectations of Membership

- Commitment to active participation throughout senior year
- Support of chapter achievement of its goals
- Adherence to local and national *Constitution, Bylaws*, Standing Rules, and Privacy Policy
- Financial obligations: membership fee paid prior to initiation and local dues if applicable

F. Summer Address - Share with other members

G. Initiation Procedures

- Date, time and place
- Guests invited & welcomed

H. Submit Demographics Form online

## CHAPTER AND OFFICER TRANSITION

Chapter transition is best accomplished by having activities involving both the new and past members of the chapter. Officer training and transition directly affects the success of Mortar Board and is crucial because of the yearly turnover of members.

- o Following initiation, the chapter elects officers for the coming year. Review the positions, titles, and duties of officers in the *Bylaws*.
- o A new chapter advisor might also be selected at this time. Review the requirements for advisors and thank your current advisors.
- o The new chapter should begin to set goals. Review chapter minimum standards and national chapter awards.

Below is a suggested meeting agenda for a combined meeting of old and new officers and advisors:

- A discussion of the greatest challenges of the past year—positive & negative.
- Suggestions from outgoing officers for improvement.

- Individual meetings of officers and advisors with their predecessors.
- Time for new officers and advisors to ask questions.
- A verification that all membership fees have been sent to the National Office by May 15.
- An exchange of phone numbers and addresses.
- Preparation of the conference delegate—usually the chapter president.

### ***Group development discussions***

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In a session with new and old members meeting together, divide into small groups. Have new members in a group together and old members in another group to discuss the following:

#### **Outgoing members:**

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

#### **Incoming members:**

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

### ***Building diversity and teamwork***

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If the membership selection process is followed correctly, your chapter membership will represent a variety of majors, causes, interests, cultures, and ages. This diversity is of value to Mortar Board and a leadership challenge. How can such a diverse group work together? How does one begin to lead leaders? And how can decisions be made? Also keep in mind that if you have scheduled your selections and initiation early enough in the year, your membership numbers at the end of spring will be doubled, including the incoming and outgoing classes. What new things can your chapter accomplish with this new-found strength in numbers?

An effective Mortar Board chapter requires team building. Otherwise the projects and activities will be organized by a small group who have developed an individual loyalty to the group or to the leader. In most cases the officers will then end up doing all the work, because the group has not developed into a team.

When team building is incorporated into the development of the organization, the overall result will be a cohesive, mutually supportive and trusting group that will have high expectations for the task accomplishment and will at the same time respect individual differences in values, personalities, skills, and idiosyncratic behavior. While team building benefits the organization, it should equally nurture individual potential.

## **MEMBERSHIP FAQ**

### **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 that is given, failure to complete or submit a nomination form or faculty recommendations CANNOT be a reason for non-consideration of a candidate.

### **Since Mortar Board members are busy people, should the new member 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. You should have received the Membership Selection Handbook and membership forms no later than mid-October. Your chapter should discuss the Selection by Consensus method thoroughly and

may wish to practice this method by using the sample selection activity.

### **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, according to Article I, Section 2 of the Mortar Board *Bylaws*, is the minimum grade point average representing the upper 35 percent 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/majors which tend to have high averages 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 multiple methods. Try campus media, information tables, open houses, fliers, banners, displays (especially during Mortar Board Week), faculty/staff nominations and e-mail 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, non-traditional students). The best way 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 Mortar Board 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. Consult with your advisor during the selections meeting, if necessary, if this becomes an issue.

### **If you can't pay the membership fee, can you still join Mortar Board?**

Yes. The Mortar Board *Bylaws* (Article XII, Section 2) provide each chapter one gift initiation fee in case of financial need. The Coral V. Stevens 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, chapter advisor or school administrator.

### **Can 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 all chapters encouraged to select an honorary member each year?**

Yes and no. Each chapter is allowed and encouraged to tap as many as three honorary members in an academic year (see *Bylaws*, Article I, Section 6 and Standing Rules 1, Q). Honorary membership may be conferred on a person who has made a significant contribution toward Mortar Board's goals and purposes on the college/university and community or region. Approval is given by the National Office. No collegiate or recent Mortar Board graduates are eligible for honorary membership. Honorary membership can be approved at any time during the academic year but must be done at least four weeks before tapping.

### **Can new members be tapped immediately after selection?**

No. Your chapter's candidate list (OMR) must be approved by the National Office before tapping can occur. Please allow a minimum of two weeks for approval. Under no circumstances should tapping proceed before approval of the candidate list.



**SELECTION BY CONSENSUS MOCK SELECTIONS GUIDE**

*Selection by Consensus procedures*



**Mortar Board, Inc. Mock Selection Meeting  
Prep Tech University**

Please follow the directions outlined for the Selection by Consensus process in the Membership Selection Handbook beginning on page 4. Involve all of your chapter members in this practice exercise and be sure to complete it at least once before selections to familiarize everyone with the process.

**Sample tally sheet for selections**

This sample tally sheet is provided to help your chapter document the voting process in a neat and organized manner. The tally sheet can be used a number of different ways that your chapter can decide upon before beginning the selections process. It can be used by an advisor as a master tally sheet as well as/or for each voting member to have a copy to cast votes for certain candidates in each round. Add additional candidate names and ballot rounds as necessary.

Candidate ID numbers or names		<b>1<sup>st</sup> ballot # of votes required:</b> _____	<b>2<sup>nd</sup> ballot # of votes required:</b> _____	<b>3<sup>rd</sup> ballot # of votes required:</b> _____	<b>4<sup>th</sup> ballot # of votes required:</b> _____	<b>5<sup>th</sup> ballot # of votes required:</b> _____
	Jenny Wise (1)					
	Melinda Lee (2)					
	Brian Stevens (3)					
	Mark Forman (4)					
	Susie Jameson (5)					
	Steve Collins (6)					
	Ed Black (7)					
	Margaret Miller (8)					
	Karen Kirk (9)					
	Parul Kapa (10)					
	Bill House (11)					
Stephanie Mills (12)						

## Candidates for selection:

1. **Jenny Wise**  
3.4 - Pre-Medicine  
Pre-med Club, VP  
Sophomore Honor Society, Historian  
Sorority Pledge Trainer  
Student Health Advisory Council  
Organization of African American Students
2. **Melinda Lee**  
3.2 - Dance Education  
Homecoming Court  
Cafeteria Student Manager  
Asian American Club  
Sorority Pres.  
College Dance Troupe
3. **Brian Stevens**  
3.9 - Pre-Law  
Student Government, Pres.  
Quaker Workshop Leader  
University Scholarship  
Blood Drive, Chair  
Debate Team, Pres.  
Student Admissions Office Ambassador
4. **Mark Forman**  
3.7 - Political Science  
Campus Radio Station D.J.  
Army ROTC, Drill Captain  
Gaming Club, VP  
International Relations Club  
Political Science Honorary
5. **Susie Jameson**  
4.0 - Journalism  
Campus Newspaper Editor  
Women in Communications - Co. Pres.  
Campus Activities Board, Speakers Committee Chair  
Big Brothers/Big Sisters Volunteer
6. **Steve Collins**  
3.6 - Business  
University Honors Council Rep.  
Student Production Manager for Campus TV Station  
Cultural Awareness Week, Chair  
Debate Club
7. **Ed Black**  
3.6 - Environmental Biology  
Environmental Awareness Club, Treasurer  
Tennis Team  
College Democrats  
Student Government Senator  
Committee to Streamline Student Government, Chair  
Student Judicial Board
8. **Margaret Miller**  
3.5 - American History  
Sophomore Honor Society, Pres.  
History Club, Sec.  
Service Sorority, Public Relations Chair  
Fine Arts Club
9. **Karen Kirk**  
3.5 - Communications  
Co-Author, Campus TV News Program  
Gay Lesbian Union  
Public Relations Student Society of America, Sec.  
National Merit Scholar  
Outdoor Club
10. **Parul Kapa**  
3.8 - Comparative Religion & Psychology  
International Student Association, Pres.  
Islamic Society  
Soccer Team  
Literary Magazine Editor  
Diversity Week, Co-Chair
11. **Bill House**  
3.3 - Physical Education  
Basketball Team, Captain  
NAACP  
Intramural Golf Club  
Big Brothers/Big Sisters Volunteer  
Physical Education Dept. Advisory Committee
12. **Stephanie Mills**  
3.6 - African American Studies  
Track Club, Pres.  
Campus Tour Guide  
Disabled Olympics Coordinator  
Residence Hall Floor, Pres.