



# OMICRON DELTA KAPPA

The National Leadership Honor Society

## Circle Officer Handbook 2017-18



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# Circle Officer Handbook

## 2017-18

### MISSION

Identify, honor and develop leaders in collegiate and community life.  
Encourage collaboration among students, faculty, staff and alumni to advance leadership.  
Promote and publicize our ideals.



### VISION

As the most respected and effective leadership honor society, Omicron Delta Kappa strives for excellence in leadership and character development.



### VALUES

Scholarship • Service • Integrity • Character • Fellowship



### FIVE PHASES OF CAMPUS LEADERSHIP

Scholarship  
Athletics  
Campus or Community Service, Social and Religious Activities, and Campus Government  
Journalism, Speech and Mass Media  
Creative and Performing Arts



### FAST FACTS

Founded: Dec. 3, 1914  
Birthplace: Washington and Lee University  
Colors: white, black, and light blue  
Flower: blue delphinium  
Number of living members: 252,864  
Number of active circles: 300

## NATIONAL STRUCTURE

Circle: The basic unit of Omicron Delta Kappa is the collegiate circle. Membership in the Society can come only through election and initiation by one of the collegiate circles.

Society Board of Directors: The executive body of Omicron Delta Kappa.

Foundation: Omicron Delta Kappa's Foundation is a separate 501(c)3 organization and uses the money it raises to support leadership development programs and provide scholarships to OΔK members.

National Advisory Council: Members of OΔK's National Advisory Council represent OΔK's key constituencies—students, circle coordinators, faculty advisors and alumni—and are appointed by the Board of Directors to serve two-year terms.

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## OAK DATES & DEADLINES

TITLE	AVAILABLE	DEADLINE	REQUIRED FOR CIRCLES
Circle Affiliation Fees	July 1, 2017	December 3, 2017	Yes <sup>1</sup>
Initiation/National Lifetime Membership Fees	July 1, 2017	No later than 14 days prior to your ceremony	Yes <sup>1</sup>
Initiation/Membership Certificate Orders	July 1, 2017	No later than 14 days prior to your ceremony	Yes <sup>1</sup>
Maurice A. Clay Leadership Development Initiative Grants	August 15, 2017	October 30, 2017	
2018 Biennial Convention and Leadership Conference	November 1, 2017	May 15, 2017	
Founder's Day Program Report	December 1, 2017	February 1, 2018	
Leader of the Year	December 5, 2017	March 1, 2018 <sup>2</sup>	
Foundation Scholarships	December 5, 2017	March 1, 2018 <sup>2</sup>	
Laurel Crowned Circle Award Nomination	January 1, 2018	February 1, 2018	
Cheryl M. Hogle Distinguished Service Award	January 1, 2018	April 1, 2018	
Morlan-Bishop Outstanding Faculty Officer Award	January 1, 2018	April 1, 2018	
Circle Annual Report	January 1, 2018	May 30, 2018	Yes <sup>1</sup>
Eldridge W. Roark, Jr. Meritorious Service Award Nominations	January 1, 2018	April 1, 2018	
National Day of Service Report	April 13, 2018	May 31, 2018	
Clay Grant Reimbursement	Open	November 30, 2017	Yes*
Circle Leadership Change	Open	No later than 30 days after the leadership change	Yes

<sup>1</sup> These are required to be eligible for Circle Recognition Awards

<sup>2</sup> New date for FY2017-18

\* Required for Clay Grant Recipients

See the Dates & Deadlines website for a complete list of important dates with links to forms:  
<http://odk.org/dates-and-deadlines-2017-2018/>

## CONSTITUTION AND BYLAWS

The National Constitution and Society's bylaws are on the OΔK website ([www.odk.org](http://www.odk.org)) under Governance. These are the foundational documents of the organization and all circles must follow them. The national structure gives circles great latitude to operate in the way that works best for each campus. The national criteria for membership, standards for circle activity, and fiduciary responsibilities for each circle are provided in the constitution and bylaws. Circles should draft their own supplemental bylaws for the operation of each circle. Circle bylaws may not in any way infringe on the national constitution or bylaws.

*Please note there were changes to the bylaws approved by the Board of Directors in June 2017. All changes have been posted on the website. <http://odk.org/about-odk/governance/society-bylaws/>.*

## CIRCLE BYLAWS

Writing and keeping local bylaws that accurately reflect your circle's practices, policies, and procedures is important to maintain its health and well-being. This document can set the amount any local dues, establish timeframes for meeting schedules, and/or create additional officer positions beyond the minimum called for within the National Constitution and bylaws of the Society.

### Requirements for a Circle to be in "Good Standing"

The following are required by the Society's national bylaws or by specific policy of the Society. A circle must meet all these requirements in order to be in good standing.

Requirement 1: The circle must elect or appoint the following officers: student president, student vice president, treasurer, faculty advisor, and circle coordinator. The circle coordinator may serve as the treasurer. Circles may use different titles for the student positions. The officers are generally the student chief executive officers and whomever serves as the financial manager of the circle. The circle officers are voting members of the circle. (Article IX, Sections 1 & 2)

Requirement 2: All circle officers must be initiated members of OΔK. Faculty Advisors and Circle Coordinators may be inducted *Honoris Causa*.

Requirement 3: The circle must have four voting faculty/staff members at all times.

Requirement 4: The circle must update the national headquarters with the most recent officers, initiation dates, and circle bylaws. Records must be updated anytime there is a change in circle required leadership or circle bylaws.

Requirement 5: Initiation fees must be paid in advance of initiation. The national organization is not supposed to provide the symbols of membership (certificate and pin) without payment. (Art. V, Secs. 1 & 3)

Requirement 6: The affiliation fee (institutional dues) must be paid by December 3 each year for circles that initiate in fall term. If a circle only initiates in spring term, it is permitted to pay the affiliation fee by April 30 each year.

## CIRCLE OPERATIONS

### **OFFICER ROLES AND RESPONSIBILITIES**

#### **Circle Coordinator**

- Responsible for the collection and submission of national lifetime membership fees
- Maintain a file containing regular circle meeting minutes, a list of current and past members with their addresses and classifications, and all other records of the circle
- Submit the membership certificate order form, via membership.odk.org, no less than 14 calendar days in advance of each initiation ceremony
- Report the names, addresses, and telephone numbers of circle officers, by submitting an officer change form
- Pay the annual \$100.00 circle affiliation fee (institutional dues)
- Submit the annual report online to the National Headquarters by May 30
- Send news items to the National Headquarters for possible promotion through OΔK's communications outlets

#### **Faculty Advisor**

- Assist the student officers in the arrangement of public tapping procedures, including local campus publicity and public relations with the community at large
- Assist in a thorough orientation for new members by providing information and support and ensuring that all pertinent information is communicated
- Make sure that your circle is current with its registration as a student organization with your student activities or dean of students' office

#### **Student Officers (President, Vice President, Treasurer)**

As student officers of your circle, your responsibilities include:

- Establish a regular circle meeting schedule as well as officer meetings
- Work with circle coordinator and faculty advisor to set the circle's calendar for the year ensuring that membership selection, reporting, and initiation happen in a timely manner
- Facilitate goal setting
- Encourage, support, and motivate circle
- Update college or university administrators on the circle's activities
- Be familiar with national bylaws as well as the circle's bylaws and policies
- Work with circle coordinator and faculty advisor to ensure minimum circle standards are being met
- Host an orientation for new members, explaining OΔK's history and purpose and their obligations as members
- Preside over induction ceremony
- Help maintain circle documents
- Determine appropriate programming for the campus
- Ensure circle is represented at national convention and regional drive-in workshops
- Encourage members to remain in contact with OΔK after graduation

As a student officer, you have a number of resources to guarantee that your officer term is successful. You should:

- Meet with your circle's outgoing president
- Attend national conventions or drive-in workshops
- Talk with your circle's advisors regularly
- Meet with other incoming officers
- Contact the national headquarters if you have questions
- Crowdsource among your circle's members
- Reach out to other campus organizations for support with programming

### **Circle Assistant**

- The Circle Assistant is a new title for a position that has been active for many years on campuses. The circle assistant is an individual who may or may not be officially part of the circle but is usually employed by the faculty advisor or circle coordinator in another capacity – many times as an administrative assistant. The circle assistant can be given authority to submit certificate orders, pay invoices, request forms, and act on behalf of the other circle advisors.
- Although officially an informal position, ODK now lists this position in MMS and the membership database to maintain more accurate records.

### **Officer Transition**

Each year, the student leadership of the organization will change hands as new student officers are elected. Make sure the individual or circle completes the ODK Leadership Update form on the ODK website as part of your officer transition.

If you are a circle advisor planning to retire, change jobs, or move to another university, please inform the National Headquarters as soon as you know you are leaving your circle. Also, it is greatly appreciated by your circle and the National Headquarters if you can assist in identifying a replacement. The Membership Services Team will support your circle during the transition to new faculty leadership.

## **CIRCLE MEMBERSHIP AND ROSTER MANAGEMENT**

Circles are required to use the ODK Membership Management System (MMS) and the ODK web reports. Links to the MMS and a variety of web forms can be found on the Circle Officers page on the ODK website: <http://odk.org/circle-officers/>

The MMS is primarily used for Membership Application and the Initiation Certificate Order Form. It is important the circle officers familiarize themselves with this system and maintain active logins. While ODK respects that circles have a wide variety of membership recruiting practices, all individuals who are to be considered for initiation must complete the Membership Application. Circle officers are responsible for approving or rejecting



applications. The result of those actions will be used to create and approve the Certificate Order Form.

Updates for circle officers and OΔK web pages are managed through web forms. It is very important that officers maintain accurate current information through these systems. OΔK uses information stored in MMS and web pages to communicate regularly to officers.

## **MEMBERSHIP FEES AND FINANACIAL MANAGEMENT**

### **National Lifetime Membership Fee**

The national lifetime membership fee is the core financial stream for Omicron Delta Kappa. As a non-profit organization, OΔK is member-supported and member-driven. The national lifetime membership fee supports all operations of the association including member and circle services, career services platform (including internships and mentoring program), web content including developing the Leadership Matters website, leadership program development, subsidizing workshops and conferences, and general operations. Unlike some other associations and honor societies, there are no national dues after the initiation.

### **Affiliation Fee (Institutional Dues)**

Every circle, being an affiliated member of the Omicron Delta Kappa Society, will pay an annual affiliation fee (much like an institutional membership fee) that helps to fund and support the programs, services, and administration of the national organization. The Society Board of Directors determines the amount of the affiliation that is due by December 3 each year. For circles that only initiate in the spring term, OΔK will allow an exception to pay the affiliation fee at the time of initiation.

### **Circle Banking and Tax ID**

Omicron Delta Kappa does not provide bank accounts for circles or manage funds for circles. Omicron Delta Kappa Society, Inc. should not be included in any legal documents or filings related to a local circle.

Circles are encouraged to generate funds through dues and fundraising efforts. This will allow your circle more flexibility in planning its events and utilizing funds. Where permitted by university or college policies and procedures, circles may wish to open bank accounts.

#### **Establishing a Bank Account:**

To open a bank account under your circle's name, the circle must have a federal tax identification number. The **Employer Identification Number (EIN)**, also known as the **Federal Employer Identification Number (FEIN)** or the **Federal Tax Identification Number**, is a unique nine-digit number assigned by the Internal Revenue Service (IRS) to business entities operating in the United States for the purposes of identification.

The IRS prohibits circles from using the FEIN of Omicron Delta Kappa Society, Inc. Circles are independent entities from the national organization and must apply and hold a separate FEIN for any financial processes.

When applying for a FEIN, please ensure you are following university or college policies and procedures. Some universities have a trademark on their name and do not allow organization such as an ODK circle from using the name or acronym in the federal tax ID name.

To apply for a federal tax ID number, visit: <https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>.

## NATIONAL HEADQUARTERS COMMUNICATION

The OΔK National Headquarters communicates with circle officers and members on a regular basis. The primary method of communication is through *Outspoken*, the monthly officer update, and *Leading Today, Leading Tomorrow*, a monthly posting of interesting articles and resources for officers and members. The National Headquarters Staff will send reminders about important deadlines and information that is pertinent to the success of your circle. If you ever have questions about any publications or communications, do not hesitate to contact the National Headquarters.

## ONLINE RESOURCES

The Omicron Delta Kappa website ([www.odk.org](http://www.odk.org)) has a wealth of information and resources to support circle officers. In the About section of the site, there is a brief history of OΔK, profiles of the national leadership corps, and our governance documents including the National Constitution and Bylaws of the OΔK Society as well as the Foundation Bylaws. The Members tab has information that your circle may want to share with prospective members. Each circle also has a page within the website that should be updated on an annual basis. Most importantly, the tab for the Circle Officers has links to several programming resources as well links to forms that help your circle keep its information current with the National Headquarters.

## MEMBERSHIP, RECRUITMENT, AND INITIATION

### **MEMBERSHIP**

#### **Benefits of Membership**

As a member of Omicron Delta Kappa you can take advantage of many national, regional and local opportunities offered by the Society. Such opportunities include, but are not limited to, leadership conferences, recognition awards, circle grants, individual scholarships and networking opportunities. Being a member of OΔK is a commitment to leadership throughout your campus and community.

#### Activities and Programs

The Biennial National Convention and Leadership Conference held once every two years, provides the opportunity for growth and learning at the national level, while also offering strategic leadership workshops and networking sessions. Regional drive-in workshops, held in the alternate years, offer similar growth and learning opportunities through the collaboration of institutions within a specific geographic region. Activities on the local level are at the discretion of each circle but often include sponsoring leadership forums and workshops, hosting campus and community-wide lectures, and participation in philanthropic service projects.

#### Recognition

Membership in OΔK conveys recognition of the very top leaders at an institution who have attained a high standard of efficiency in collegiate activities and scholarship. Outstanding alumni, faculty and staff may also be honored as OΔK members, in addition to local, regional and national leaders who may be selected for honoris causa membership to a circle.

#### Networking

Through membership in Omicron Delta Kappa, students, alumni and faculty/staff members gain potential friendships with more than 300,000 people whose peers recognize them as both scholars and leaders. Members can connect on OΔK's Facebook Page (Omicron Delta Kappa), Twitter Profile (@ODK1914), Instagram Profile (@odk\_hq), and LinkedIn Group (Omicron Delta Kappa).

#### Value and Service

Continued service to one's alma mater and to OΔK can be achieved by serving on the Society Board of Directors, Foundation Board of Trustees, National Advisory Council (NAC), or a national committee.

### **RECRUITMENT**

#### **Engaging First and Second Year Students**

Circles are encouraged to connect with first and second year students to make them aware of Omicron Delta Kappa. Recognition of emerging leaders, providing leadership development programs, and including underclassmen in select circle events are all

appropriate activities. Circles, however, should be cautious in involving first and second year students in any activities which may be seen as “pledging” before earning full membership in OΔK. Omicron Delta Kappa prohibits the hazing of current and prospective members.

### **Faculty and Staff**

A key element of OΔK tradition is the strong relationship between students, faculty, and staff. Circles should have four voting faculty members in the circle representing most of the five phases of collegiate life. Circle officers are encouraged to recommend students they believe meet the standards of leadership and scholarship in OΔK.

### **Membership Application Process**

Omicron Delta Kappa was the first college honor society of a national scope to give recognition and honor for meritorious leadership and service in extracurricular activities and to encourage development of general campus citizenship. Through membership in OΔK, you enter the ranks of more than 300,000 people whose peers recognize them as scholars and leaders. To be considered for membership, all potential members must complete the National Leadership Honors Society Membership Application on the OΔK website.

**Beginning in July 2017, OΔK will no longer permit Circle Coordinators, Faculty Advisors, or other members of the circle to complete an application for the initiate. Because the application constitutes a contract and includes permissions that must be accepted by the member, a third party may no longer complete the application for the initiate.**

The application will be processed by the circle advisors. Please note that this form, payment of national lifetime membership fees, and participation in an induction ceremony are all prerequisites for membership in Omicron Delta Kappa. This membership application form is only one component of the membership selection process.

### **Circle Specific Process**

1. Gather the circle to determine expectations and rubric for evaluating applicants.
2. Distribute recruitment materials (emails and brochures).
3. Utilize membership.odk.org in order to process applications.
4. Log-in to the officer portal in the top-right corner at membership.odk.org and review applicants.
5. As needed, send new members to the online payment page to submit the national lifetime membership fee.
6. Submit certificate order form through the officer portal.

## INITIATION

OΔK provides a complete guide to the initiation program and ritual. Circles can request a copy of the Initiation Handbook by contacting the National Headquarters.

Initiation is a three-part process: selection, notification, and ceremony.

## BEST CIRCLE PRACTICES

- Induct at least one faculty or staff member, alumni or honoris causa (one free each year).
- Engage four voting faculty/staff members (two faculty officers and two at-large) in voting matters and circle activities.
- Identify two faculty advisors (circle coordinator and faculty advisor).
- Identify student leadership, specifically a circle president.
- Coordinate upcoming induction and recruitment process.
- Review and update circle bylaws each year.
- Send at least one delegate to Drive-In workshops and the 2018 Biennial Convention and Leadership Conference.
- New member initiations held at least once each year, with membership forms submitted to National Headquarters 14 calendar days in advance of the ceremony.
- Give careful consideration to choosing at least one person from each of the five phases of campus life when selecting members.
- Apply for a Maurice A. Clay Leadership Development Initiative Grant.
- Select a circle leader of the year.
- Pay affiliation fee (annual institutional dues).
- Submit the annual report by May 30 each year.

## CIRCLE RECOGNITION

### Basic Expectations

To be eligible for any award, a circle *must* have:

- Completed annual report by May 30;
- Submitted annual affiliation fee; and
- Provided membership processing documents to headquarters at least 14 calendar days prior to initiation, and completed the initiation.

### Circle Awards

#### *Circle of Distinction*

In addition to the basic expectations, this award honors circles that have completed at least three of the following:

- Selected and submitted the nomination for a circle Leader of the Year
- Sponsored a circle driven signature event on campus

- Participated in National Day of Service (or an equivalent service project)
- Submitted an application for a Maurice A. Clay Leadership Development Initiative Grant
- Submitted a nomination for a national award

#### *Superior Circle*

This award honors circles that have done the following:

- Fulfilled the requirements to be recognized as a Circle of Distinction
- Sent delegate(s) during the past biennium to the Biennial Convention and Leadership Conference during an even-numbered year *or* sent delegate(s) to a Drive-In Workshop during an odd-numbered year
- Qualified for one of the Supplementary Recognitions (Membership Growth and Stability, or Circle Stewardship)

#### *Presidential Award of Excellence*

This award honors circles that have qualified as

- Circle of Distinction for five consecutive years, or
- Superior Circle for three consecutive years, or
- Some combination of both (Circle of Distinction and Superior Circle) for five consecutive years.

#### Supplementary Recognition, Honor Rolls

To encourage the ongoing health of our circles, OΔK annually will recognize circles in the following two categories:

#### *Membership Growth and Stability*

This recognition acknowledges circles that have accomplished one of the following:

- Consistent membership growth over the past two biennia
- Maintained ideal circle size as identified and reported by the circle

#### *Circle Stewardship Award*

This recognition acknowledges circles that have fulfilled at least two of the following:

- Raised funds to benefit a local community organization
- Raised funds to benefit the local circle
- Raised funds to benefit the OΔK Foundation

## PROGRAMMING AND ACTIVITIES

### Programs

#### Conventions and Workshops

##### Biennial National Convention and Leadership Conference

The **Biennial National Convention and Leadership Conference** is held once every two years, provides the opportunity for growth and learning at the national level, and also offers leadership workshops and networking sessions.

##### Drive-In Workshops

Regional **Drive-In Workshops**, held in the alternate years, offer similar growth and learning opportunities through the collaboration of institutions within a specific geographic region.

#### Webinars

ODK periodically offers national webinars on topics such as leadership skills, career advancement, and organizational effectiveness. Announcements are posted online, in monthly updates, and through specific invitations to target audiences.

#### Training

ODK now offers webinars for circle advisors and officers. Webinars are held monthly using the Zoom webinar platform. Descriptions of each training are below.

##### Circle Advisor Training

Designed for faculty advisors, circle coordinators and circle assistants, this training focuses on the basic relationship between the advisor and national headquarters. Topics include circle record management, recruitment and retention, policies, finances and programming tips.

##### Student Officer Training

The target audience for circle office training is the student officers of the circle. Still appropriate for advisors, the officer training covers the basics of circle records, finances and recruitment but includes more information about circle programming, retention and circle development from a student perspective.

##### MMS Training

MMS training is an in depth training on the ODK Member Management System. This webinar explores all aspects of the member management system including downloading reports, tailoring applications, and managing the circle MMS records.

## Grants

### Maurice A. Clay Grants for Leadership Development Initiatives

Clay Grants are designed to enhance leadership development on your campus. Programs are chosen by the National Awards Committee using three distinct characteristics: (1) furthering circle engagement within the campus community, (2) enhancing current programming, and (3) developing new initiatives to increase publicity. A key part of the OΔK mission is to encourage collaboration among students, faculty, staff, and alumni to advance leadership. Circles are encouraged to collaborate with leaders across campus and the five phases. Clay Grant applications open each year on August 15 and are due on October 30. Grants are to be used within the next calendar year with a final report due by November 30.

### Circle Specific Grants

Some circles have specific grants that established through donations to the national organization on behalf of the circle. Please check with OΔK headquarters staff to determine if your circle has been endowed with a specific grant.

## Scholarships

### Foundation Scholarships

Every year, the Omicron Delta Kappa Foundation awards scholarships to more than 20 collegiate members to continue their educations through graduate and professional study. Scholarship awards range from \$1,000 to \$2,500. These recipients demonstrate exceptional academic performance and leadership abilities. General scholarships are awarded each year for graduate or professional school expenses. Collegiate members and alumni up to five years out of school are eligible to apply.

### General Russell E. Dougherty National Leader of the Year

The Omicron Delta Kappa Leader of the Year program is named in honor of Gen. Russell E. Dougherty, United States Air Force (Ret.). Gen. Dougherty was one of the Air Force's best thinkers and planners and served as NATO's Allied Command Europe headquarters chief of staff, commander in chief of the Strategic Air Command, and executive director of the U.S. Air Force Association.

Each OΔK circle selects an outstanding student to be named their Circle Leader of the Year. These students receive a certificate and are invited to apply for the National Leader of the Year Award.

Circles who nominate students as Circle Leader of the Year receive credit toward national awards.



## Circle Programs

To see the many different programs, activities and awards that our circles across the country are involved with, download the helpful circle programming examples found within the Officer Resources online at <http://odk.org/circle-officers/develop-programming/>.

Alumni Events	NY Times in Leadership
Awards/Recognition	Publications
Campus Events	Receptions
Circle Activities	Scholarships
Community Service	Social Awareness
Fundraising	Speaker Series
Homecoming	Tapping Ceremonies

## Useful Webpage Links

Webpage	URL
Circle Recognition	<a href="http://odk.org/circle-officers/awards-and-reports/circle-recognition/">http://odk.org/circle-officers/awards-and-reports/circle-recognition/</a>
Constitution	<a href="http://odk.org/about-odk/governance/constitution/">http://odk.org/about-odk/governance/constitution/</a>
Drive-In Workshops	<a href="http://odk.org/programs/drive-in/">http://odk.org/programs/drive-in/</a>
Fees (Lifetime Membership, Affiliation, etc.)	<a href="http://odk.org/circle-officers/fees/">http://odk.org/circle-officers/fees/</a>
Leader of the Year	<a href="http://odk.org/circle-officers/awards-and-reports/gen-russell-e-dougherty-national-leader-year-award/">http://odk.org/circle-officers/awards-and-reports/gen-russell-e-dougherty-national-leader-year-award/</a>
Membership Application	<a href="https://membership.odk.org">https://membership.odk.org</a>
National Biennial Convention & Leadership Conference	<a href="http://odk.org/get-involved/national-convention/">http://odk.org/get-involved/national-convention/</a>
National Lifetime Membership Fee Payment	<a href="http://odk.org/national-membership-enrollment-and-payment/">http://odk.org/national-membership-enrollment-and-payment/</a>
Scholarships	<a href="http://odk.org/get-involved/scholarships/">http://odk.org/get-involved/scholarships/</a>
Society Bylaws	<a href="http://odk.org/about-odk/governance/society-bylaws/">http://odk.org/about-odk/governance/society-bylaws/</a>
Webinars	<a href="http://odk.org/programs/webinars/">http://odk.org/programs/webinars/</a>