



# OMICRON DELTA KAPPA

The National Leadership Honor Society

## Circle Officer Handbook 2018-19



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**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.



**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



**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

**FAST FACTS**

Founded: December 3, 1914  
Birthplace: Washington and Lee University  
Colors: white, black, and light blue  
Flower: blue delphinium  
Number of living members: 300,000+  
Number of active circles: 304

**NATIONAL STRUCTURE**

Member	Any individual initiated by a circle. Individuals are members for life.
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.
Headquarters Staff	The professional staff led by the executive director who serve the Society by managing the operations and ensuring the viable future of the organization.



## OAK DATES & DEADLINES

TITLE	AVAILABLE	DEADLINE	REQUIRED FOR CIRCLES
Circle Affiliation Fees <sup>1</sup>	July 1, 2018	December 3, 2018	Yes
Initiation/Membership Fees <sup>1</sup>	July 1, 2018	Prior to or within 30 days after ceremony	Yes
Initiation/Membership Certificate Orders <sup>1</sup>	July 1, 2018	No later than 14 days prior to your ceremony	Yes
Maurice A. Clay Leadership Development Initiative Grants	August 15, 2018	October 30, 2018	
Founder's Day Program Report	December 3, 2018 (Founders' Day)	February 1, 2018	
Circle Leader of the Year	December 5, 2018	March 1, 2019	
Foundation Scholarships	December 5, 2018	March 1, 2019	
Laurel Crowned Circle Award Nomination	January 1, 2019	February 1, 2019	
Cheryl M. Hogle Distinguished Service Award	January 1, 2019	April 1, 2019	
Morlan-Bishop Outstanding Faculty Officer Award	January 1, 2019	April 1, 2019	
Eldridge W. Roark, Jr. Meritorious Service Award Nominations	January 1, 2019	April 1, 2019	
Clay Grant Reimbursement*	January 1, 2019	November 30, 2019	Yes*
National Day of Service Report	April 11, 2019 (National Day of Service)	May 31, 2019	
Circle Annual Report <sup>1</sup>	February 1, 2019	June 30, 2019 <sup>2</sup>	Yes
Stewardship Award Application	February 1, 2019	June 30, 2019 <sup>2</sup>	
Circle Growth and Stability Award	February 1, 2019	June 30, 2019 <sup>2</sup>	
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>Date changed for FY2018-19

\*Required for Clay Grant Recipients

See the Dates & Deadlines website for a complete list of important dates with links to forms:

<https://odk.org/dates-and-deadlines-2018-19/>

## 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 constitution and bylaws approved by the Board of Directors and Society in June 2018. All changes are posted on the website. <http://odk.org/about-odk/governance/>.*

### 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 of 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. Circles may have additional officers beyond those required by the Society Bylaws. 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 initiated as *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. When the national headquarters provides an invoice for membership fees, that invoice must be paid within 30 days of receipt. (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 OFFICERS

### **CIRCLE ADVISORS**

The circle must have two advisors at all times: a circle coordinator and a faculty advisor.  
(OΔK Bylaws, Article IX, Sections 1 & 2)

The circle may also have a circle assistant who works closely with the official advisors in managing the circle.

#### **Circle Coordinator**

- Responsible for the collection and submission of national lifetime membership fees from new members
- 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](http://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
- Ensure payment of the annual \$100.00 circle affiliation fee (institutional dues)
- Submit the annual report online to the national headquarters by June 30
- Send news items to the national headquarters for possible promotion through OΔK's communications outlets

#### **Faculty Advisor**

- Assist 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

#### **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 in administrative tasks.

Although officially an informal position, OΔK now lists this position in MMS and the membership database to maintain more accurate records.

### **STUDENT OFFICERS**

The circle must have a student president and student vice president at all times. A student treasurer is optional if one of the circle advisors is managing the circle funds.

(OΔK Bylaws, Article IX, Sections 1 & 2)

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

- Lead, support, and motivate circle
- Update your institution's 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 meet minimum circle standards
- Host an orientation for new members, explaining OΔK's history and purpose and their obligations as members
- Preside over initiation ceremony
- Help maintain circle documents
- Determine appropriate programming for the campus
- Make sure circle is represented at national OΔK events
- 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 OΔK events
- 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 MEMBERSHIP AND ROSTER MANAGEMENT

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

The MMS is the required application submission and approval database. It is important that circle officers be familiar with this system and maintain active logins. While OΔK respects that circles have a wide variety of membership recruiting practices, all individuals who are to be considered for initiation must complete the National Lifetime Membership Application found online at <http://www.membership.odk.org>. Circle advisors 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 online 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.

#### **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 OΔK Leadership Update form on the OΔK website as part of your officer transition.

<https://odk.org/circle-officers/>

If you are a circle advisor planning to retire, change jobs, or move to another institution, 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/staff leadership.

## MEMBERSHIP FEES AND FINANCIAL 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 by April 30.

### **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, ensure you are following university or college policies and procedures. Some institutions 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 *Officer Update*, the monthly officer update, and *Leading Today, Leading Tomorrow*, a posting of interesting articles and resources for officers and members, and the *The Keynote*, a quarterly newsletter to OΔK 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.



## CIRCLE BEST PRACTICES

The circles that are successful in maintaining membership, empowering leaders, and serving the Society have many things in common. Below is a list of best practices that have proven to serve as a solid base for circles.

- New member initiations held at least once each year, with membership forms submitted to national headquarters at least 14 calendar days in advance of the ceremony.
- Choose at least one person from each of the five phases of campus life when selecting members.
- Initiate at least one faculty or staff member, alumni or honoris causa (one free honoris causa each year).
- Engage four voting faculty/staff members (two faculty officers and two at-large) in voting matters and circle activities.
- Maintain two faculty advisors (circle coordinator and faculty advisor).
- Elect student leadership, specifically a student president, student vice president and treasurer.
- Have an annual plan for the recruitment and initiation process.
- Review and update circle bylaws each year, as needed.
- Send members to the national leadership conference, regional workshops, and encourage them to participate in OΔK sponsored webinars
- Apply for a Maurice A. Clay Leadership Development Initiative Grant.
- Participate in the National Day of Service/National Day of Giving
- Select a Circle Leader of the Year and submit a nomination to the national headquarters.
- Pay affiliation fee (annual institutional dues).
- Submit the annual report by the stated deadline each year.

## 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. Each circle also has a page within the website that should be updated annually. Most importantly, the tab for **Circle Officers** (<https://odk.org/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.

Some of the more commonly used webpages are listed below.

Circle Recognition

<http://odk.org/circle-officers/awards-and-reports/circle-recognition/>

National Leadership Conference

<http://odk.org/get-involved/national-convention/>

OΔK Constitution and Bylaws

<http://odk.org/about-odk/governance/>

National Lifetime Membership Fee Payment

[https://odk.org/membership\\_fees\\_payment/](https://odk.org/membership_fees_payment/)

Fees (Lifetime Membership, Affiliation, etc.)

<http://odk.org/circle-officers/fees/>

Scholarships

<http://odk.org/get-involved/scholarships/>

Leader of the Year

<http://odk.org/circle-officers/awards-and-reports/gen-russell-e-dougherty-national-leader-year-award/>

Templates

<https://odk.org/circle-officers/materials/circle-templates/>

Membership Application

<https://membership.odk.org/>

Webinars

<http://odk.org/programs/webinars>

## MEMBERSHIP, RECRUITMENT, SELECTION, 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.

Refer recruits to the benefits of membership page on the OΔK website. It has a comprehensive list of benefits and links to resources.

<https://odk.org/members/benefits-membership/>

### 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 that may be perceived 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 OΔK’s standards of leadership and scholarship.

### SELECTION

#### **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 at [membership.odk.org](http://membership.odk.org).

*As of July 2017, OΔK no longer permits 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 circle advisors will process the application. Please note that this form, payment of national lifetime membership fees, and participation in an initiation 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**

- Gather the circle to determine expectations and rubric for evaluating applicants.
- Distribute recruitment materials (emails and brochures).
- Utilize [membership.odk.org](http://membership.odk.org) in order to process applications.
- Login to the officer portal in the top-right corner at [membership.odk.org](http://membership.odk.org) and review applicants.

- As needed, send new members to the online payment page to submit the national lifetime membership fee.
- 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. It is available in Word and PDF format on the OΔK website: <https://odk.org/circle-officers/materials/>.

The planning and execution of the initiation ceremony or ceremonies should be considered a circle activity that involves all active members of the circle. It is not just the responsibility of the student president and advisors. Here are a few general tips.

- Make it formal. The more reverence given the initiation ceremony, the more important the members feel.
- Make it public. OΔK ceremonies are never secret. Invite the campus. Specifically invite senior administrators and faculty to participate. Invite family and friends of the initiates. This should be a public celebration of leadership.
- Make it memorable. Including an important speaker, initiating well-known institutional members as honoris causa, and creating a tradition that is unique to your circle will make the event one that members, families, and guests remember for many years.

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## CIRCLE RECOGNITION

### Basic Requirements

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

- Completed annual report by the stated deadline;
- 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.

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

### **National Conferences and Workshops**

#### National Leadership Conference

Beginning in 2020, OΔK will hold an annual national leadership conference. This conference provides the opportunity for growth and learning at the national level and offers leadership workshops and networking sessions.

#### Regional and Local Workshops

Regional and local workshops offer similar growth and learning opportunities through the collaboration of institutions within a specific geographic region. OΔK launched the Stone Ethical Leadership Challenge and Campus Conversations in 2018. These programs can be administered by a circle or circle members can participate in regional workshops coordinated by the national headquarters.

### **National Day of Service/National Day of Giving**

The second Thursday of April is the OΔK National Day of Service and National Day of Giving. Service is one of our core values and as such, we encourage all circles to participate in the National Day of Service. Plan a service project on that day. For circles that have service projects at other times during the year, post photos and information on social media on the National Day of Service to demonstrate your commitment to service.



We also encourage members to participate in the National Day of Giving by contributing to the OΔK Foundation. Gifts large and small support scholarships, programs, and the work of the Society to recognize and develop leaders. Contributions from a circle can count toward the Circle Stewardship Award.

### **Webinars**

OΔK 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**

OΔK 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 roles of the advisors and relationship between the advisor and national headquarters. Topics include circle record management, recruitment and retention, policies, finances and programming tips.

#### Student Officer Training

Similar to the advisor training, the student officer training provides insight into the role of student officers. This 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 OΔK Membership 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 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 its Circle Leader of the Year. These students receive certificates and an invitation 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.