**Officer Duty Matrix**

*This document is meant to serve as a guide for dividing officer responsibilities amongst advisors and student officers. Some rows have been filled in with examples; however, this is a working document and can be modified to reflect each circle’s needs. Additional rows may also be added if there are local responsibilities not included here.*

P = Primary Duty | S = Secondary Duty

CC = Circle Coordinator | FA = Faculty Advisor | AA = Alumni Advisor | CA = Circle Assistant | SP = Student President

VP = Vice President | TR = Treasurer

| **Duties** | **Type** | **CC** | **FA** | **AA** | **CA** | **SP** | **VP** | **TR** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Develop annual activity plan for the circle | Activities |  |  |  |  |  |  |  |
| Make sure that the circle is current with its registration as a student organization with the institution’s student activities or dean of students’ office as necessary | Administration |  |  |  |  |  |  |  |
| Track circle minimum standards and circle recognition | Administration |  |  |  |  |  |  |  |
| Submit the annual report online to the National Headquarters by June 30 | Administration |  |  |  |  |  |  |  |
| Attend national headquarters webinars and training opportunities to improve circle operations | Administration |  |  |  |  |  |  |  |
| Coordinate the Circle Leader of the Year selection and submit recipient to the National Headquarters | Awards |  |  |  |  |  |  |  |
| Write and submit Clay Leadership Development Initiative Grant application | Awards |  |  |  |  |  |  |  |
| The circle must initiate within the fiscal year July 1, to June 30 each year. [O∆K Policies and Procedures Manual 370] | Circle Minimum Standards |  |  |  |  |  |  |  |
| All officers must be initiated members of O∆K [O∆K Policies and Procedures Manual 315] | Circle Minimum Standards |  |  |  |  |  |  |  |
| Two active voting advisors, Circle Coordinator, Faculty Advisor, and the names must be communicated to the national headquarters annually. [O∆K Policies and Procedures Manual 315, 320, 321] | Circle Minimum Standards |  |  |  |  |  |  |  |
| An elected student president and student vice president and the names must be communicated to the national headquarters annually. [O∆K Policies and Procedures Manual 320] | Circle Minimum Standards |  |  |  |  |  |  |  |
| An elected student treasurer if the Circle Coordinator or Faculty Advisor does not handle funds for the circle and the name must be communicated to the national headquarters annually. [O∆K Policies and Procedures Manual 323] | Circle Minimum Standards |  |  |  |  |  |  |  |
| All individuals seeking membership must complete the national membership application. [O∆K Policies and Procedures Manual 240] | Circle Minimum Standards |  |  |  |  |  |  |  |
| All invited members must pay the national lifetime membership fees prior to receiving the emblems of membership (pin and certificate). Only honoris causa and newly appointed advisors shall have their national lifetime membership fees waived by the national headquarters. [O∆K Policies and Procedures Manual 230] | Circle Minimum Standards |  |  |  |  |  |  |  |
| The initiation must follow the ordained ritual program and anyone seeking lifetime membership in O∆K must be present at an official initiation ceremony. [O∆K Policies and Procedures Manual 240] | Circle Minimum Standards |  |  |  |  |  |  |  |
| A circle must have a minimum of two and not more than five voting faculty/staff members of the circle. [O∆K Policies and Procedures Manual 320] | Circle Minimum Standards |  |  |  |  |  |  |  |
| Pay Institutional Membership Fee by fall or spring deadline. Institutional fees are due at the time of the first circle initiation each academic year. [O∆K Policies and Procedures Manual 315] | Circle Minimum Standards |  |  |  |  |  |  |  |
| Circles are required to meet at least twice between August 1 and December 15 and twice between January 1 and June 15 each year, not including initiation ceremonies. [O∆K Policies and Procedures Manual 342] | Circle Minimum Standards |  |  |  |  |  |  |  |
| Complete and submit the Circle Annual Report by the national deadline. [O∆K Policies and Procedures Manual 340] | Circle Minimum Standards |  |  |  |  |  |  |  |
| Plan and implement the Signature Leadership Program  [O∆K Policies and Procedures Manual 920] | Circle Minimum Standards |  |  |  |  |  |  |  |
| Plan and implement the Signature Service Program  [O∆K Policies and Procedures Manual 930] | Circle Minimum Standards |  |  |  |  |  |  |  |
| Supervise marketing and promotion efforts for circle ceremonies and events | Communications |  |  |  |  |  |  |  |
| Maintain circle website and ensure O∆K national website information is up to date | Communications |  |  |  |  |  |  |  |
| Oversee social media and marketing efforts | Communications |  |  |  |  |  |  |  |
| Develop community outreach efforts | Events |  |  |  |  |  |  |  |
| Coordinate circle participation and attendance at the National Leadership Conference | Events |  |  |  |  |  |  |  |
| Submission of National Lifetime Membership Fees from new members | Finance |  |  |  |  |  |  |  |
| Ensure payment of the annual circle Institutional Membership Fee (IMF) | Finance |  |  |  |  |  |  |  |
| Ensure that circle financial accounts are appropriately established within the college/university or local banking institution | Finance |  |  |  |  |  |  |  |
| File appropriate tax documents if the circle is independent of college/university financial systems | Finance |  |  |  |  |  |  |  |
| Coordinate planning and logistics of initiation ceremonies | Initiation |  |  |  |  |  |  |  |
| Serve as the presiding officer of tapping and initiation ceremonies | Initiation |  |  |  |  |  |  |  |
| Invite senior university officials and important alumni to initiation ceremonies | Initiation |  |  |  |  |  |  |  |
| Send news items to the National Headquarters for possible promotion through O∆K’s communications outlets | Marketing |  |  |  |  |  |  |  |
| Provide a thorough orientation for new members by providing information and support and ensuring that all pertinent information is communicated | Membership |  |  |  |  |  |  |  |
| Identify potential faculty/staff, alumni or honoris causa members *and ensure university president or chancellor is a member* | Membership |  |  |  |  |  |  |  |
| Plan and lead circle meetings | Membership |  |  |  |  |  |  |  |
| Maintain circle records: circle bylaws, circle meeting minutes, a list of current and past members with their addresses and classifications, and all other records of the circle | Records |  |  |  |  |  |  |  |
| Submit the membership certificate order form via MMS portal | Records |  |  |  |  |  |  |  |
| Report the names, addresses, and telephone numbers of circle officers | Records |  |  |  |  |  |  |  |
| Request list of eligible members from the registrar or appropriate office | Recruitment |  |  |  |  |  |  |  |
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