Beta Brotherhood Assessment Campaign Plan

September 2026

This resource is a step-by-step guide to help chapter presidents promote the Beta Brotherhood Assessment and get results. Please refer to the Beta Brotherhood Assessment FAQs and the Beta Brotherhood Assessment Troubleshooting Guide for more information.

Does your chapter have new members?
Everyone on your roster as of October 1, including new members, will receive the survey. If your new members don't attend regular chapter meetings, ask the Vice President of Education to make these same announcements during new member meetings.

If your bid day/induction is after October 1, your new members won't be able to participate this year. That's OK! They can participate next year.

Week of September 20 (3 weeks out): Introduce the Beta Brotherhood Assessment

- Make an announcement in a chapter meeting or Group Message.
    - Example Announcement:
      "Brothers- Quick heads up!
      We've got a survey coming up soon called the Beta Brotherhood Assessment. It will be sent to you on October 9 and will be open until November 2. This isn't just a random form. Every Beta chapter takes it. It's meant to help us get a better idea of how we're building brotherhood here at [Chapter Nickname or Campus Name or Chapter Designation]*, and how we can keep improving the chapter. Be on the lookout for more info from exec as we get closer to the launch date. It's important that we all take a few minutes to knock it out once it goes live."*
- Share the purpose of the survey and the importance of the information it provides.
    - The Fraternity has partnered with Dyad Strategies, an educational research company that works with universities and fraternal organizations, to measure the brotherhood within every Beta chapter.
    - At Conclave in January Chapters receive a chapter report of the results. The next Exec team will get the chance to discuss how to use them to set priorities and goals.

Week of September 27 (2 weeks out): Update Contact Information and Roster

- **Update your roster by September 30**. This is the deadline to make roster adjustments for billing AND it will affect who will / will not receive the survey.

- To find a guide on how to manage the chapter roster on MyBeta you can find help on Beta.org on our Knowledge Base page.
- Set aside 5 minutes during chapter meeting to have members update their contact information on MyBeta (https://my.beta.org/home > Login > Name in Top Right > My Profile > Edit Profile). Each member should ensure the email listed as their 'Preferred Email Address' is one that is checked often.
    - Example Message:
      "Brothers, we are officially two weeks out from the Beta Brotherhood Assessment opening. Make sure your email address is correct on MyBeta. The survey will be sent to that email address. Everyone, please pull out your phone. We're going to take 5 minutes right now to log in to MyBeta and get this done. Make sure that the email address on MyBeta is one that you check regularly."
- For members who didn't attend chapter meeting: Send a message to the entire chapter to remind them to update their contact information. Set a specific deadline and follow up!
    - Persistence is key and while it can seem annoying it gets results! Having correct contact information for every member will save you time later by not needing to troubleshoot after the survey opens.
- VP of Administration / Secretary: Pull membership roster from MyBeta to ensure that the roster is current and that everyone has an email on their profile
    - my.beta.org > login > Select your chapter > Roster > Export.
- Exec Team: Set a participation goal for your chapter and decide chapter incentives:
    - Create competition! Offer an incentive for the new member class with the highest participation.
    - Food is a great motivator. Offer Chipotle or pizza if the entire chapter gets to a certain participation percentage or offer gift cards for the first 10 brothers who complete their survey.
    - Incentives for chapters being offered by the General Fraternity are outlined in the Beta Brotherhood Assessment FAQs.

Week of October 4 (Week of launch): Get excited and motivate the chapter!

- Chapter meeting announcement from president:
    - *"On Friday, October 9 we will all receive the Beta Brotherhood Survey in our inboxes. The email will clearly say "Beta Brotherhood Assessment" so please don't delete it. The survey link only works for you, so please don't forward it to other people to fill out."*
    - *"I expect us all to . . .*
        - *Option 1.) set aside 25 - 30 minutes at the end of our next chapter meeting to complete the survey. We will have a shortened meeting and a 'paper agenda' to allow you to spread out in here or around campus to take the survey during the time you would normally be in chapter."*
            - This is an opportunity to do something fun for a chapter meeting, once everyone is done completing the survey either hang out and watch a football game or do a "pass the gavel".

        - *Option 2.) set aside 25 - 30 minutes at some point during the week after receiving the survey to complete it."*
    - *"Our exec team has set a goal of reaching XX% participation from our chapter. If we hit that number. . . . ." list the General Fraternity incentives and any local incentives if the entire chapter hits that goal.*
    - *"We also want to keep it fun and create some competition, so we're also offering Individual incentives. . . . ."* list the other incentives you're offering to keep it fun and create healthy competition.
- For members who didn't attend chapter meeting: Email these announcements and/or send them out on the GroupMe to ensure that all members are aware of the expectation.

October 9: Beta Brotherhood Assessment Kickoff!

- You should decide the best environment to complete the survey – if your chapter can be quiet and focused, then set aside 30 minutes after chapter meeting or the new member meeting. If your members will be more serious and focused taking it on their own, then consider doing a "virtual chapter meeting" – you cancel the meeting, send out announcements via email and ask members to use that time to complete the survey.
- If members don't receive the survey or have technical problems, refer to the Beta Brotherhood Assessment Troubleshooting Guide.

While Survey is open (Oct 9 – Nov 2)

- While the survey is open, Chapter Presidents and Chapter Counselors will receive completion reports twice a week. Reports will include:
    - Chapter participation numbers
    - Current rank of completion percentage among all Beta Chapters
    - Last year's completion percentage
    - A list of **every member**, the **email** the survey was sent to, response **status** and their **unique survey link**
- The survey results are confidential; these status reports will show who has or has not completed the survey so you can work with individual members to encourage them to complete the survey.
- Administrative Office contact for weekly reports: Noah McHale, Senior Director of Growth, noah.mchale@beta.org or 513-273-2204.

November 2: Beta Brotherhood Assessment Closes

- After the survey closes, no more answers can be submitted. Chapter data is displayed in comparison to All-Beta data, and this work cannot begin until we stop collecting data.
- Chapter Presidents and Chapter Counselors will receive a final participation report in mid-November. Completion percentages are used in consideration for awards.
- Exec Officers will receive a chapter specific report before Conclave.