Beta Volunteer Assessment Campaign Plan

September 2026

This resource is a step-by-step guide to help Advisors successfully promote the Beta Volunteer Assessment and achieve great results. Please refer to the Beta Volunteer Assessment FAQs and the Beta Volunteer Assessment Troubleshooting Guide for more information.

Is your volunteer roster up to date?
Everyone on the advisor roster as of September 30 will receive the survey. Please have your roster updated before that date to ensure the correct people are receiving the survey. This includes ensuring that all advisors have made sure that their email information is correct in MyBeta.

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

- Example messaging to an Advisory Team: *"Hi everyone! The Beta Volunteer Assessment (BVA) will be sent to us in early October. The purpose of this survey is to understand more about our experience and effectiveness in our volunteer roles. Every Beta advisor is being asked to take this survey. The survey will close on November 2. The only thing you'll need to do this week is to ensure your contact information is up to date on MyBeta."*
- Volunteers can update their contact information on MyBeta (my.beta.org > Login > Name in Top Right > My Profile > Update Profile.

Week of September 29 (2 weeks out): Update Contact Information

- Example messaging to an Advisory Team:
  - *"Friends, the BVA is opening in 2 weeks. Make sure your email address is correct on MyBeta. That's the email the survey will be sent to. It should take less than 5 minutes to do:*
    MyBeta (my.beta.org > Login > Name in Top Right > My Profile > Update Profile*"*
- Officer feedback on advisors in the BVA is integrated into the Beta Brotherhood Assessment (BBA).
- Advisors should be talking to their advisees about the chapter's plans to encourage completion of the survey. Advisors can reference the Beta Brotherhood Assessment Campaign Plan

Week of October 4 (Week of launch): Get excited and motivate your team

- Sample messaging to other Volunteers:
  - *"On Friday you will be emailed the Beta Volunteer Survey. The email will clearly say "Beta Volunteer Assessment" so please don't delete it. The survey link in the message is unique to you, so please don't forward it to others to fill out. You should plan to set aside 15 - 20 minutes to complete the survey."*

- Advisors serving on more than one advisory team, will receive more than one link (one for each chapter they advise), they should do all of them!

October 9: Beta Volunteer Assessment Kickoff!

- If Volunteers have trouble accessing the survey or encounter technical problems they can refer to the Beta Volunteer Assessment Troubleshooting Guide.

October

- While the survey is open, Chapter Counselors will receive completion reports each week. Reports will include:
  - Advisor participation numbers
  - Last year's completion percentage
  - A list of **every advisor**, 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 Volunteer Assessment Closes

- After the survey closes, no more answers can be submitted. Data is displayed in comparison to All-Beta data, and this work cannot begin until we stop collecting data.
- Chapter Counselors, GFOs and Staff will receive a final participation report in mid-November.
- Advising teams will receive a chapter specific report before Conclave.