



## Positive Pledge Education Assessment 2018 – 2019 Academic Year

The Positive Pledge Education Assessment (PPEA) is designed to support and promote the safety and quality of the pledging experience in Beta Theta Pi. The checklist below includes required, recommended and prohibited components of effective programs and sample questions for discussion with the pledge educator and advisors.

In the interest of member safety and to ensure that all new members receive good education and a strong foundation for membership in Beta Theta Pi, the Board of Trustees is requiring PPEA certification for all chapters during the 2018-19 academic year.

### Deadlines:

- Fall 2018: Chapters taking fall pledges must have their programs certified by **September 1 or two weeks prior to induction**, whichever is earlier.
- Spring 2018: Chapters that only take winter / spring pledges must have their programs certified by **December 15**.
- Chapters that take both fall and spring pledges only need certification in the fall, unless they make significant changes to the program. Chapters will need to re-certify if they make any changes to the program, if the campus or IFC undergoes significant changes, or at the district chief's request.
- Colonies established during the 2018-19 academic year do not need to be certified, as their member education will be directed by the on-site colony development coordinator. Contact Director of Expansion Zach Lepperd with questions (zach.lepperd@beta.org).
- Chapters participating in Beta's pilot member orientation program do not need to be certified. Contact Mandi Dilling with questions about participation of your chapters in the pilot (mandi.dilling@beta.org).

### PPEA Certification Process:

1. District chief contacts pledge educator and advisor to confirm upcoming recruitment dates; they agree on a timeline for PPEA certification.
2. Pledge educator, chapter president and at least one advisor review the current program against this checklist and revise as needed.
3. Chapter sends pledge education materials to the district chief, including any handouts, quizzes or manuals. This should also include a printout of or link to the calendar for pledge events (and, ideally, the entire chapter calendar).
4. District chief reviews materials using the checklist below.
5. District chief schedules a call with pledge educator and advisor to discuss feedback and ask questions about the program. If his schedule allows, the leadership consultant should be on the call.
6. Chapter revises pledge program based on district chief feedback within a specific timeframe (district chief should set a clear deadline and follow up with a reminder).
7. Chapter sends revised pledge program materials back to the district chief.
8. District chief reviews program to confirm that changes have been made.
9. District chief submits certification and pledge program via the link below. Copies of the certification are sent automatically to the district chief, regional chief and director of chapter operations.

Submit PPEA certification online at [www.beta.org/ppea-certification](http://www.beta.org/ppea-certification)

## Outcomes for Pledge Education

Pledge education programs should be designed to achieve these outcomes:

### Introduction to Beta Theta Pi

- New member knows Beta's five core values and knows how to apply them to his daily life.
- New member understands chapter's leadership structure and has met all members of the executive team.
- New member feels a strong sense of belonging in his chapter.

### History, Ritual and Lore

- New member has learned the founding history and lore of Beta Theta Pi Fraternity.
- New member has learned the founding history and lore of his local chapter.
- New member has participated in at least one Eye of Wooglin ceremony.
- New member can sing several Beta songs, including songs that are part of ritual ceremonies.

### Brotherhood

- New member has built deep, authentic friendship with several members of his pledge class.
- New member has positive and personal relationships with several upperclassmen / initiated members of the chapter.
- New member has met more than one chapter advisor / house corporation board member and understands the role that volunteers play in supporting the chapter.
- New member believes that members of the chapter care about him.

### Personal Growth

- New member believes that the chapter supports his academic achievements and wants him to be a successful student.
- New member understands the role of the Kai Committee and other mechanisms for personal and group accountability within the chapter.
- New member has been educated on Beta's Risk Management Policy and applicable campus policies regarding alcohol, hazing, sexual assault and safe event planning.
- New member has been trained on appropriate steps to prevent and respond to risk and risk management issues, including how and to whom to report concerning events or behavior.
- New member will have experienced at least one fraternity or university sponsored workshop or program on a topic of personal growth.
- New member has been presented opportunities to participate in Beta's leadership development programs or leadership programs sponsored by the campus.

### Home

- New member feels a strong sense of belonging.
- New member feels welcome in the chapter facility.
- New member believes that the chapter supports his personal values, and he is not asked to compromise himself, his values or his beliefs to be a member of the Fraternity.
- New member has demonstrated respect for other members, guests and the community.

### General Orientation

- New member understands the financial obligations of being a member, where his money goes, and is current in his financial obligations.
- New member understands the academic requirements of being a member and has demonstrated an ability to consistently meet that standard.
- New member understands the requirements for attendance at meetings and other events and is prepared to meet those obligations.
- New member understands his obligations toward a chapter home, including financial obligations and expectations to live and eat in the facility, and has demonstrated respectful treatment of the chapter home.

## Required Pledge Education Program Components

For a program to be certified, it must contain all items listed below. These items must be identifiable in the written program and easily understood by the reader.

- A written calendar of all activities including date, time, location and names of exec members scheduled to attend or facilitate.
- Clear involvement from advisors and alumni.
- Written outlines, scripts or facilitation guides for all events, activities, tests and other materials.
- Documented training about Beta's Risk Management Policy early in the program, ideally before the first social function of the pledge period.
- A clear set of written expectations for the pledge period and positive accountability.
- Have a positive initiation week with all rituals and complementary ritual reviews.
- Approval for any local rituals or adaptations of ceremonies outlined in the Ritual Book.

## Red Flags in the Pledging Process

The items listed below are red flags that should be discussed with the pledge educator and advisors and remediated before certification.

- Advisors do not know the content of pledge education.
- Advisors do not know the schedule of events for pledging.
- Advisors are not invited to pledge meetings or other events.
- Advisors do not attend pledge events.
- Advisors do not know the schedule for initiation week activities.
- Pledge educator appears to be disorganized and unsure which activities are happening when.
- Chapter president does not know when and where pledge activities are happening, or the agenda for those events.
- Pledge educator is given complete control and autonomy over the program, with no input from other officers or advisors.
- No organized calendar before the start of the academic term.
- Not having a consistent time or location for pledge meetings.
- Not knowing when or where initiation will be held.
- Initiation scheduled for a Friday or Saturday night, or at another time that could be conducive to having parties or alcohol.
- Excessive or unusual hours with no clear objective or purpose. An example is house hours where pledges must be at the house every day except when in class.
- Excessive study hours in a specific location.
- Pledges are asked to do tasks or duties that are different or beyond what initiated members are asked to do. Examples are cleaning the house or designated driver duties.
- Pledges are required to schedule interviews with upper-class members in a way that could lead to personal servitude or inappropriate activities to "earn" a signature.
- Pledges are subject to unusual or unnecessary rules. Examples might be requiring pledges to wear specific clothing, prohibiting pledges from going into certain parts of the chapter house, or requiring periods of silence.
- Pledges are asked to surrender their wallets, cell phones or other personal belongings.
- Pledges are asked to sleep over at the house, or anywhere other than their normal bedroom, for any amount of time.
- Retreats or off-campus activities requiring an overnight stay or large chunks of unprogrammed time.
- Scavenger hunts, excessive memorization, or other special activities only the pledges are required to complete.
- Pledges serving as sober monitors for social functions.
- No criteria for serving as a big brother.

- No training or documented expectations for big brothers.
- No training or documented expectations for how initiated members should treat pledges.
- Excessive length of the pledge program (more than eight weeks), with big gaps between the end of education and initiation.
- Initiation or other rituals when exec officers are off campus. An example is holding initiation during CPLA or Keystone weekends.
- Strange wording or language that could indicate unhealthy or secret traditions.
- Local traditions or rituals that are not well documented or that are inappropriate or unnecessary.

### Questions for Discussion with Pledge Educator and Advisor

- When was the last time the program was revised?
  - The program should be reviewed and updated every year. However, chapters should avoid major rewrites every year unless directed by their district chief.
- Do advisors come to pledge meetings?
  - Advisors should know about all scheduled events with pledges and be invited to attend.
- How often does the pledge educator talk to his advisor?
  - Ideally, they are speaking or meeting at least every other week leading up to pledge education and checking in weekly during busy periods (first week after recruitment, week leading up to initiation).
- Where are pledge meetings held?
  - Meetings should be held where they can be conducted in a professional manner, ideally with AV support. A classroom on campus is the best location. If the chapter house is used for meetings, the space should be conducive to a productive meeting.
- Who runs pledge meetings?
  - Obviously, the pledge educator should be the primary facilitator. But other exec members, advisors, campus professionals and alumni should be used to help teach and train. Some chapters with large pledge classes use a committee; if that's the case ask how those committee members are screened and appointed.
- When is the initiation date shared with new members?
  - The date should not be a secret. It should be shared with the new members at the beginning of pledging.
- Where will initiation be held?
  - The location should be conducive to a polished and meaningful ceremony and should be scheduled well in advance.
- How is the rest of the chapter informed about pledge activities?
  - During chapter meetings the pledge educator should give an update about what the pledges are learning and other activities planned for the week.
- How are big brothers selected and matched?
  - Serving as a big brother is a serious responsibility that should only be granted to members in good standing who are good role models.
  - In fall 2018, a short big brother training course will be available on beta.org, along with a facilitation guide for in-person training. It will be advertised via the Beta Brief.
- Do you do pledge reviews? If so, how often and what criteria do you use to evaluate pledges?

- If a pledge needs to be released from the program, how is that handled?
- How much time during your weekly exec meeting is devoted to talking about the new member program?
  - The entire exec team should have a weekly update about the pledge program.
- Is there a GroupMe or other group chat / text method you use to communicate with pledges? Who is in that group?
  - If there is a text group or special communication method for pledges, all members of exec and at least one advisor should be in the group.
- How do you train the chapter about hazing and appropriate treatment of your pledges?
- Have you ever had problems in the past with hazing, or members going rogue and messing with the pledges?
  - If district chief knows that the chapter has past hazing incidents, share that knowledge and the consequences the chapter faced.
- How do you involve the fraternity / sorority life office in your program?
  - Chapters should share the program with their campus professionals and engage them in the process; for instance, by asking someone from the fraternity / sorority life office to facilitate a portion of the program.
- What are your “lessons learned” from previous pledge classes?
- How can I [the district chief] help make your program successful?