



BETA THETA PI
— MEN OF PRINCIPLE —

Beta Brotherhood Assessment Campaign Plan

September 2019

This resource is a step-by-step guide to help chapter presidents successfully promote the Beta Brotherhood Assessment and achieve great results. Please refer to the [Beta Brotherhood Assessment FAQs](#) and the [Beta Brotherhood Assessment Troubleshooting Guide](#) for more information.

Semester Schools

Does your chapter have pledges / new members?

Everyone on your roster as of September 25, including new members, will receive the survey. If your pledges / new members don't attend regular chapter meetings, ask the VP of Education to make these same announcements during new member meetings.

If your bid day / induction is after September 25, your new members won't be able to participate this year. That's OK! They can participate next year.

Week of September 8 (3 weeks out)

- Objective: Introduce Beta Brotherhood Assessment
 - Example Announcement: *"Brothers! I have an announcement regarding a survey – called the Beta Brotherhood Assessment -- that will be sent to us in the coming weeks. The purpose of this survey is to understand how we here at (Greek Designation or campus nickname) build our brotherhood. This is something that every Beta chapter across the country is taking part in so that we can better measure how we create strong brotherhood. A link to the online survey will be e-mailed to each of you on September 29 and the survey will close on November 3. The executive board will keep you updated in the coming weeks with more info."*
- Explain 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 across the nation, to measure the brotherhood created within every Beta Theta Pi chapter."*
 - *"At CPLA in January I received our chapter's report of the assessment and met Dr. Gentry McCreary, the guy who designed the survey (he's not a Beta, he is an independent researcher). The results were pretty insightful and our exec team built goals around the results. I'm excited to see what our chapter's results will be in year two."*

Week of September 15 (2 weeks out)

- Objective: Update contact information
 - Set aside 5 minutes during chapter meeting to have members update their contact information on MyBeta (my.beta.org → login → My Profile → Update).



- *“Brothers, we are officially two weeks out from taking the Beta Brotherhood Assessment, but first we need to make sure your email address is correct on MyBeta. The survey will be sent to that email address. If everyone would 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.”*
- Ensure your roster is up-to-date. September 25 is the last day to make any roster changes to affect who will / will not receive the survey.
- For members who didn’t attend chapter meeting: Send an email / GroupMe to the entire chapter to remind them to update their contact information. Set a specific deadline.
- Post-work for VP of Communication / Secretary: Pull your membership spreadsheet from MyBeta to ensure that the roster is current and that everyone has an email on their profile (my.beta.org → login → Chapter Profile → Membership Roster → Download (Excel)).
- Post-work for exec team: Set a participation goal for your chapter and decide chapter incentives:
 - Create competition! Offer an incentive for the pledge class with the highest participation.
 - Food is a great motivator. Offer a Chipotle or pizza party 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 September 22 (1 week out)

- Objective: Get excited and motivate your chapter
 - Chapter meeting announcement from president:
 - *“On Sunday, September 29 we will all receive the Beta Brotherhood Survey in our e-mail in-boxes. The email will clearly say “Beta Brotherhood Assessment” so please don’t delete it. The survey link in the message is custom for you, so please don’t forward it to other people to fill out. The survey link only works for you.”*
 - *“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.”*
 - *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: Post these announcements on your listserv / GroupMe to ensure that all members are aware of the expectation.



September 29: Beta Brotherhood Assessment Kickoff!

- Objective: Complete the survey!
- 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](#).

October

- Through October, the chapter president and Chapter Counselor will receive weekly reports showing overall participation numbers, plus a detailed list showing the status of each member. The survey results are confidential; these status reports will show who has or has not completed the survey so you can track your completion rate.
- Administrative Office contact for weekly reports: Cody Hike, Beta Brotherhood Assessment Program Coordinator, cody.hike@beta.org, 800-800-2382.

November 3: Beta Brotherhood Assessment Closes

- After the survey closes, no more answers can be submitted.
- Chapter presidents will receive a final participation report in mid-November. These results will be included in the Standard Chapter Operating Expectations (SCOE) report and considered for awards.
- Chapter presidents will receive a custom chapter report in early January (the entire exec team and all advisors will be copied). Chapter Presidents Leadership Academy in mid-January will include several sessions about Beta’s aggregate results and training on how to interpret your chapter report.



Quarter Schools

Recognizing that the Beta Brotherhood Assessment will launch just as quarter schools are getting into the swing of things, we have suggested alternate deadlines and announcements. Please review this schedule with your exec team before the quarter starts to agree on deadlines and incentives.

Does your chapter have pledges / new members?

Everyone on your roster as of September 25, including new members, will receive the survey. If your pledges / new members don't attend regular chapter meetings, ask the VP of Education to make these same announcements during new member meetings.

If your bid day / induction is after September 25, your new members won't be able to participate this year. That's OK! They can participate next year.

First chapter meeting (week of September 15)

- Objective: Introduce Beta Brotherhood Assessment and update contact info
 - Example Announcement:
 - *"Brothers! I have an announcement regarding a survey – called the Beta Brotherhood Assessment -- that will be sent to us in the coming weeks. The purpose of this survey is to understand how we here at (Greek Designation or campus name) build our brotherhood. This is something that every Beta chapter across the country is taking part in so that we can better measure how we create strong brotherhood.*
 - *"The Fraternity has partnered with Dyad Strategies, an educational assessment company that works with universities and fraternal organizations across the nation, to measure the brotherhood created amongst every Beta Theta Pi chapter."*
 - *"At CPLA in January I received our chapter's report of the assessment and met Dr. Gentry McCreary, the guy who designed the survey (he's not a Beta, he is an independent researcher). The results are pretty insightful and I'm excited to see what our chapter's results will be in year two."*
 - *"A link to the online survey will be e-mailed to each member on September 29 and the survey will close on November 3."*
 - *"Therefore, we need to make sure your email address is correct on MyBeta. The survey will be sent to that email address. If everyone would 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 you use is one that you check regularly."*
 - Set aside 5 minutes during chapter meeting to have members update their contact information on MyBeta. (www.my.beta.org → login → My Profile → Update).
 - Ensure your roster is up-to-date. September 22 is the last day to make any roster changes to affect who will / will not receive the survey.
 - For members who didn't attend chapter meeting: Send an email / GroupMe to the entire chapter to remind them to update their contact information. Set a specific deadline.



- Post-work for VP of Communication / Secretary: Pull your membership spreadsheet from MyBeta to ensure that the roster is current and that everyone has an email on their profile (www.my.beta.org → login → Chapter Profile → Membership Roster → Download (Excel))
- Post-work for exec team: Set a participation goal for your chapter and decide chapter incentives.
 - Create competition! Offer an incentive for the pledge class with the highest participation.
 - Food is a great motivator. Offer a Chipotle or pizza party if the entire chapter gets to a certain participation percentage or offer gift cards for the first 10 brothers to complete their survey.
 - Incentives for chapters being offered by the General Fraternity are outlined in the [Beta Brotherhood Assessment FAQs](#).

Week of September 22 (1 week out)

- Objective: Get excited and motivate your chapter
 - Chapter meeting announcement from president:
 - *“On Sunday, September 29 we will all receive the Beta Brotherhood Survey in our e-mail in-boxes. The email will clearly say “Beta Brotherhood Assessment” so please don’t delete it. The survey link in the message is custom for you, so please don’t forward it to other people to fill out. The survey link only works for you.”*
 - *“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 to allow you to spread out in here or around campus to take the survey during the time you would normally be in chapter.*
 - *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: Post these announcements on your listserv / GroupMe to ensure that all members are aware of the expectation.

September 29: Beta Brotherhood Assessment Kickoff!

- Objective: Complete the survey!
- 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. 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 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](#).



October

- Through October, the chapter president and Chapter Counselor will receive weekly reports showing overall participation numbers, plus a detailed list showing the status of each member. The survey results are confidential; these status reports will show who has or has not completed the survey so you can track your completion rate.
- Administrative Office contact for weekly reports: Cody Hike, Beta Brotherhood Assessment Program Coordinator, cody.hike@beta.org, 800-800-2382.

November 3: Beta Brotherhood Assessment Closes

- After the survey closes, no more answers can be submitted.
- Chapter presidents will receive a final participation report in mid-November. These results will be included in the Standard Chapter Operating Expectations (SCOE) report and considered for awards.
- Chapter presidents will receive a custom chapter report in early January (the entire exec team and all advisors will be copied). Chapter Presidents Leadership Academy in mid-January will include several sessions about Beta's aggregate results and training on how to interpret your chapter report.