



## Alumni Event Approval Checklist

Updated August 2021

[Beta's Substance-Free Housing Policy](#) allows up to seven (7) alumni-hosted events per year with alcohol at a Beta chapter house for groups that completed their transition to substance-free housing effective August 2020. Those events must be planned, contracted by and funded by the alumni association or house corporation and hosted for the primary purpose of alumni cultivation and brotherhood. The policy was intended to support these types of events:

- Homecoming
- Home football game days
- Alumni reunions
- Parent or faculty appreciation events

Events must be approved by the District Chief (or Regional Chief, in the absence of a DC) at least 14 calendar days in advance. Alumni associations and house corporations may request approval for multiple events at once (for instance, if alumni are hosting three gameday events over the course of a semester, all with the same logistics and vendors). Event applications will be reviewed by Administrative Office staff for completeness and to ensure that proper contracts and insurance coverage are in place, then forwarded to the District Chief for final approval. Applicants can expect a response from the District Chief within 2 - 3 business days.

Alumni who have difficulty getting a timely response from their District Chief should contact the Regional Chief. Contact information for all General Fraternity officers can be found on the chapter home page on [MyBeta](#).

Please note that there may be state, local or campus requirements for events that are separate from and in addition to Beta's event approval.

### Process for Approving Events

1. The alumni association or house corporation plans the event using these resources:
  - a. [Beta Theta Pi Risk Management Policy](#)
  - b. [Event Planning Checklist](#)
  - c. Additional event planning resources located at [Beta.org > Chapter Resources > Risk Management](#).
  - d. Any campus or IFC policies and checklists that could apply to events held at the chapter house.
  - e. Any state or local requirements in place to prevent the spread of infectious diseases.
  - f. Questions about contracts or insurance can be directed to Chief Operating Officer Erin McHale ([erin.mchale@beta.org](mailto:erin.mchale@beta.org); 800-800-2382) or Chief Strategy Officer Anne Emmerth ([anne.emmerth@beta.org](mailto:anne.emmerth@beta.org); 901-569-0946).
2. The alumni association or house corporation submits an event application located here: <https://survey.alchemer.com/s3/6476898/Alumni-Event-Application-2021-2022>. A copy of the completed application will be automatically sent to the alumni contact who fills it out.

- a. Do not contact the District Chief directly for approval. He will receive a copy of the completed application.
3. A member of the Administrative Office staff will review the application for completeness with attention to the signed contracts and submitted insurance information. The AO staff member will contact the alumni association or house corporation with questions.
  - a. As a service, the Administrative Office staff can review contracts and insurance certificates before they are signed or while you are planning your event.
4. After the application has been reviewed for completeness, it will be forwarded to the District Chief for final review and approval.
5. The District Chief will review the application. Once approved, he will send an email confirmation of his approval to the alumni contact, with a cc to the undergraduate chapter president and his Regional Chief.

### **Information Needed for the Application**

The following information is needed for the application:

- Basic details about the event, including date, location, number of expected guests, and method for managing the guest list.
- Details about security and checking IDs.
- Signed contract with third party vendor providing alcohol.
- Other signed contracts with vendors, including caterers, security or local police.
- Insurance certificate(s). Insurance certificates must be submitted for the third-party vendor providing alcohol; you are encouraged to submit insurance certificates for other vendors.
  - Recommended minimum limits: General Liability \$1,000,000 and Liquor Liability \$1,000,000.
  - If hiring security, verify that the company carries Workers' Compensation / Employee Liability of at least \$100,000 / \$500,000.