



# **Beta Theta Pi**

## **Event Planning Guide**

**Revised August 2018**

Beta Theta Pi's core values are:

- Mutual Assistance: Betas believe that men are mutually obligated to help others in the honorable labors and aspirations of life.
- Intellectual Growth: Betas are devoted to continually cultivating their minds, including high standards of academic achievement.
- Trust: Betas develop absolute faith and confidence in one another by being true to themselves and others.
- Responsible Conduct: Betas choose to act responsibly, weighing the consequences of their actions on themselves and those around them.
- Integrity: Betas preserve their character by doing what is morally right and demanding the same from their brothers.

To that end, the goal of this guide is to help chapters and alumni think critically around event planning. Before planning your event and using this checklist, please review [Beta's Risk Management Policy](#) and campus and IFC policies that govern event planning.

Advisors and alumni should be involved in event planning, but especially large events and events where alcohol will be served. Your Leadership Consultant, District Chief, and campus fraternity / sorority professionals also can offer guidance and advice. The Administrative Office staff is available to review any contracts or agreements. If your event requires proof of insurance or any kind of insurance certification, contact your Director of Chapter Operations at least two weeks before the event. The Administrative Office will not be able to accommodate last-minute requests for insurance certificates.

While following the guidelines outlined here will help to make any event safer, we recommend they be expressly followed when alcohol is present, in any situation sponsored or endorsed by the chapter, or at any event an observer would associate with the fraternity.

Holmes Murphy, Beta's insurance carrier, provides many helpful event planning resources, which are located here: <http://www.holmesmurphy.com/fraternal/resources/resources-sororities-fraternities/>

Educational credit goes to FIPG, Pi Kappa Phi Fraternity, the North-American Interfraternity Conference, and Holmes Murphy for portions of this resource.

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## Event Details

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1. Who is planning the event?

Organization:

Name:

Officer Title:

Email:

Phone:

2. Name of event:

3. Location of event:

- Chapter Facility
- Rented Facility (e.g., hotel, restaurant, event venue)
- Member(s) Residence
- Other:

4. Start time of event: \_\_\_\_\_ AM / PM

5. End time of event: \_\_\_\_\_ AM / PM

6. Purpose of event:

- Recruitment
- Social/Mixer
- Formal
- Philanthropy
- Service
- Parents / Moms / Dads event
- Faculty appreciation
- Alumni event
- Chapter anniversary
- Other: \_\_\_\_\_

7. Which best describes the event below? Check all that apply.

- Community service
- Event for members only (e.g., brotherhood event)
- Event for the general public
- Event with one or more other fraternity or sorority
  - How many other groups, and which ones?
- Event with one or more other student groups
  - How many other groups, and which ones?
- Fundraiser
- Members plus guests
- Alumni and members plus guests
- New member event
- Off-campus retreat
- On-campus retreat
- Parent Event
- Philanthropy
- Recruitment
- Ritual or initiation
- Sports or intramurals

8. The activities below could be considered high risk events. Does the planned event contain any of the following?

- Bonfires
- Bounce Houses/Inflatables
- Boxing tournament
- Building of temporary structures like floats or stages
- Contact sports (e.g. football, rugby)
- Events or activities taking place at heights more than one to two feet from the ground
- Events with firearms (trap/skeet shooting)
- Events with live animals present (e.g., rodeo, petting zoo). Note that live animals at events are prohibited by [Beta's Risk Management Policy](#). Chapters can send a request for an exception to the General Secretary.
- Events more than about 1 hour / 60 miles from campus
- Mechanical Bulls

- Obstacle courses
- Pools (including baby pools)
- Rock climbing
- Sky diving/ parasailing/bungee jumping
- Slip & Slides/Any other water feature
- Team building events that include makeshift ropes courses, trust falls, blindfolded guided walks, etc.
- Tug-o-war

9. Have any written contract or agreement been signed for any part of this event? **Y** **N**

- Food caterer: \_\_\_\_\_
- Security guards: \_\_\_\_\_
- Bus/transportation company: \_\_\_\_\_
- Third party vendor: \_\_\_\_\_
- University facility: \_\_\_\_\_
- Hotel venue: \_\_\_\_\_
- Sports field: \_\_\_\_\_
- DJ: \_\_\_\_\_
- Band: \_\_\_\_\_
- Artist: \_\_\_\_\_
- Restroom and Waste Management: \_\_\_\_\_
- Other: \_\_\_\_\_

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## Events with Alcohol

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### IS THERE ALCOHOL AT THE EVENT?

- Yes
- No

### HOW WILL ALCOHOL BE PROVIDED?

There are only two ways that alcohol can be provided at a Beta Theta Pi chapter event.

- BYOB** [Bring Your Own Beverage]

Everyone brings their own alcohol for their own personal consumption. Procedures are in place to ensure that each person is carded, that their personal alcohol is labeled and tagged, and that people are only consuming their own alcohol.

See the [Holmes Murphy BYOB Checklist](#) for how to plan and manage these events.

- Third-Party Vendor Providing Cash Bar** [Bars, Restaurants, Catering Companies, Hotels, Etc.]

Contract with a licensed establishment or caterer to provide a cash bar, where individuals purchase their own drinks.

See the [FIPG Third Party Vendor Checklist](#) for contracting and working with vendors.

Third party vendors are required for any alumni events with alcohol in chapter houses, per [Beta's Risk Management Policy](#). Alumni planning those events must ensure that vendors are appropriately licensed to sell beer and wine by the drink in their state. Alumni events at chapter houses cannot include hard alcohol, even if it is served by a third-party vendor.

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## Event Planning Details

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### WHO IS PROVIDING SECURITY?

We strongly recommend that chapters use professional security at events, especially those with alcohol. Professional security can monitor the door, check IDs, monitor members and guests, and help minimize damage to a rented facility.

See the [Holmes Murphy Security Vendor Checklist](#) for best practices when contracting for private security services.

### YOUR GUEST LIST

Every chapter event must have a guest list. [Beta's Risk Management Policy](#) specifies the maximum number of guests per member for each event. A chapter officer should be responsible for managing the guest list at the door to the event and checking guests in and out.

See the Holmes Murphy resource for [Building a Guest List](#).

Many Student Activities offices will provide ID card readers so that you can swipe students in and out of your events. Ask your fraternity / sorority professional if they have resources to help. Note that swiping students in and out does not replace the need for a guest list.

## **YOUR EVENT THEME**

If your event has a theme, it should be tasteful, respectful, and in alignment with Beta's mission, vision, and values. When selecting a theme, make sure it:

- Does NOT rely on the stereotypes.
- Does NOT encourage offensive dress or costumes.
- Does NOT stereotype men or women.
- Is NOT sexist.
- Is NOT centered on making fun of a particular group of people, a culture, or another organization.
- Does NOT lend itself to members, new members, or guests taking the theme to a place that is disrespectful or degrading.
- Does NOT infringe on the trademarks, logos, or intellectual property of companies or individuals.

## **SOBER MONITORS**

[Beta's Risk Management Policy](#) specifies the number of sober monitors required at chapter events.

See the [Holmes Murphy Sober Monitor Resource](#) for best practices for appointing and training sober monitors for your events.

## **ADDITIONAL CONSIDERATIONS**

While not specified in Beta's Risk Management Policy, here are some best practices for planning safe events:

- Have food and non-alcoholic beverages. Many bars and restaurants will let you negotiate free sodas and iced tea as part of your venue rental fee. Some will also allow you to bring in your own platters of food.
- Any decorations should be cleared first with the venue and be in compliance with fire codes.
- At least two members of exec should review and sign any contracts; ideally, an advisor would also be involved in reviewing and approving. Copies of signed contracts should be provided to the president, risk manager, and treasurer.
- Beta's Administrative Office staff is happy to help review contracts and leases.