



ALUMNI ASSOCIATION HANDBOOK

“In our Fraternity, brothers are brothers for life.”

– Beta Theta Pi Initiation Ceremony

ALUMNI ASSOCIATION PURPOSE:

The purpose of the alumni association (geographic or chapter based) is to foster and perpetuate lifelong brotherhood beyond college, bringing life to the notion found in the Fraternity’s Initiation Ceremony: “brothers are brothers for life.” They also exist to advance the Men of Principle initiative into adulthood, connect brothers in a geographic region, provide support and guidance to nearby chapters, and to give back to the local community.

MISSION: To develop men of principle for a principled life.

VISION: Every member will live Beta Theta Pi’s values.

CORE VALUES: To build lasting bonds of friendship and brotherhood, Beta calls for:

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.

STRATEGIC PRIORITIES:

Brotherhood
Personal Growth
Home



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CODE REQUIREMENTS

THERE ARE TWO TYPES OF ALUMNI ASSOCIATIONS, BOTH WITH EQUAL STANDING:

1. Chapter-specific
(i.e. Alpha Nu Alumni Association, Purdue Alumni Association, etc.)
2. Geographically based
(i.e. New York City Alumni Association, Washington D.C. Alumni Association, etc.)

PER THE CODE OF BETA THETA PI, ALL ALUMNI ASSOCIATIONS ARE REQUIRED TO CERTIFY ANNUALLY IN ORDER TO REMAIN IN "ACTIVE" STATUS:

CHAPTER VIII STATUSES

SECTION 3. Status of Alumni Associations:

- A. Categories: An Alumni Association of Beta Theta Pi will be designated as either:
 - (a) Active; or
 - (b) Inactive
- B. Definitions:
 - (a) Active: An alumni association is active if it has completed the annual certification, as prescribing in Chapter XI, Section 2 of the Laws.
 - (b) Inactive: An alumni association is considered inactive if it has not completed the annual certification, as prescribed in Chapter XI, Section 2 of the Laws (1) An inactive alumni association may be considered for a change in status at any time by submitting proof of certification to the Administrative Office, for approval by the Board of Trustees.

PER THE CODE OF BETA THETA PI, THE REQUIREMENTS OF AN ALUMNI ASSOCIATION ARE AS LISTED BELOW:

CHAPTER XI ALUMNI ASSOCIATIONS

SECTION 1. Organization: Area associations of alumni members of the fraternity may be organized by taking the following actions:

- A. There must be at least ten alumni members interested in forming the association.
- B. The interested parties must file with the Administrative Office an application form containing such information as the Board of Trustees directs.
- C. Such application is approved by the Board of Trustees. At the time of such approval the Board of Trustees shall name such alumni association.

SECTION 2. Annual Certification: Alumni associations must certify each year at least 60 days prior to an announced General Convention.

- A. The criteria for certification are:
 - a. Officers: Each Alumni Association shall have a president and such other officers as it may desire, said officers having been duly elected.
 - b. By-Laws: An Alumni Association shall adopt, amend, or repeal by-laws to assist it in carrying out its duties, not inconsistent with The Code of Beta Theta Pi.
 - c. Membership: Each Alumni Association has maintained the minimum number of members required to exist and submit a roster of its membership to satisfy the minimum requirement.

- d. Meetings: The Alumni Association holds a minimum of two functional meetings. Documentation of activities, event and participants shall be submitted to the Administrative Office, for approval by the Board of Trustees.
- B. Representation at Convention: All certified alumni associations shall be entitled to representation at Convention if:
- a. They have met the requirements set for by Chapter XI, Section 1 of the Laws of Beta Theta Pi.
 - b. They register a delegate with the Administrative Office at least 60 days prior to an announced General Convention.

Once an alumni association is formed and meets the requirements of SECTION I above, formal approval by the Board of Trustees can be requested by completing this [application](#). (The Board of Trustees meets quarterly and has virtual meetings between in-person sessions, so they thank you for your patience in their response.)

Once formally recognized and approved by the Board of Trustees, an alumni association must complete an annual certification (as referenced in SECTION II above) to qualify for representation/voting rights at the General Convention. This annual certification submission can be completed using this [application](#).

For questions, please contact Associate Director of Advancement [Zane Carlson](#).

STARTING AN ALUMNI CHAPTER

First off, thank you, brother! We are thrilled that you have expressed interest in starting an alumni association for your chapter or geographic region. This resource serves as a guide to help get you started. If you have specific questions, please contact Associate Director of Advancement [Zane Carlson](#).

STEP 1: CONTACT BETA THETA PI'S ASSOCIATE DIRECTOR OF ADVANCEMENT

Please reach out to [Zane Carlson](#), or call the Administrative Office at 800.800.BETA (2382), to notify us of your intent. This will allow us to provide you with any necessary information to help you along your journey, as well as cross-reference to ensure an alumni association doesn't already exist for the chapter or geographic area.

STEP 2: GAUGE SUPPORT WITH LOCAL ALUMNI

Using [MyBeta](#) as a resource, you can identify prospective members who will become founders of your association. Per The Code of Beta Theta Pi, you are required to have at least ten (10) members to meet eligibility for approval by the Board of Trustees.

- **For Chapter-specific Alumni Associations:** [MyBeta](#) can help identify alumni of your chapter. The associate director of advancement can assist you in providing contact information.
- **For Geographic-area Alumni Associations:** Make a list of which city/areas you wish to include, then contact the associate director of advancement for a list of alumni living in that region. Please note: we follow the standard Primary Statistical Area / Core-Based Statistical Area ([PSA/CBSA](#)) system used by the United States government.

STEP 3: BUILDING MOMENTUM FOR THE ASSOCIATION

Upon recruiting the founding alumni members, the group may wish to hold a few informal events in the area. Be sure to invite all Betas that may have interest in engaging with fellow brothers but may not have been in a position to volunteer time toward starting the association. This is a good way to ensure you are building momentum before conducting business. Further, it creates an opportunity to solicit what alumni members may be seeking in a rewarding Beta alumni experience. Our website and email partnership with ChapterSpot can help with this.

STEP 4: CONDUCT YOUR FIRST BUSINESS MEETING

Once you have communicated with and solidified your founding team, set a time and date to host your first meeting. This doesn't have to be formal but should be conducted in-person.

Some important topics on the agenda (note: while these are not required, they are highly recommended to ensure efficiency and effectiveness):

1. Adopt a constitution and bylaws for the association (see "[Sample Constitution and Bylaws](#)").
2. Establish goals of the association, and how you intend on accomplishing them.
3. Plan out a tentative calendar of events or dates.
4. Elect officer positions and terms (see "[Officer Positions](#)").
5. Decide best communication and promotional strategies moving forward (see "[Communication Best Practices](#)").
6. Decide next association meeting date and frequency of meetings (recommended to be held quarterly). To best maximize time and energy, these may be coordinated with other association events (see "[Sample Calendar](#)").

STEP 5: APPLY FOR OFFICIAL APPROVAL WITH THE BOARD OF TRUSTEES

Once you've established your organization, you will want to seek formal recognition from the General Fraternity and the Board of Trustees by completing this [application](#).

TWO IMPORTANT NOTES:

1. We recognize the application could technically be filled out prior to conducting your first meeting; however, we strongly discourage this. It's important to make sure it's not just having "names on paper," but firm commitments from people in order to prove sustainability and serve your alumni constituents effectively. You are now being looked upon as a local leader, which comes with new responsibilities.
2. Filling out this application DOES NOT qualify your association for representation and voting privileges at the General Convention. To better understand that process, please see "[Annual Certification & Voting Rights at Convention](#)."

ANNUAL CERTIFICATION AND CONVENTION VOTING RIGHTS

Once your alumni association has received official recognition from the Board of Trustees, it must certify each year to maintain both its “Active” status and to be eligible to vote as a member of the legislative body at the General Convention. To ensure the association is “Active” (which includes voting privilege), you’ll want to follow the steps outlined below, per The Code of Beta Theta Pi.

SECTION 2. Annual Certification: Alumni associations must certify each year at least 60 days prior to an announced General Convention.

- A. The criteria for certification are:
 - a. Officers: Each Alumni Association shall have a president and such other officers as it may desire, said officers having been duly elected.
 - b. By-Laws: An Alumni Association shall adopt, amend, or repeal by-laws to assist it in carrying out its duties, not inconsistent with The Code of Beta Theta Pi.
 - c. Membership: Each Alumni Association has maintained the minimum number of members required to exist and submit a roster of its membership to satisfy the minimum requirement.
 - d. Meetings: The Alumni Association holds a minimum of two functional meetings. Documentation of activities, event and participants shall be submitted to the Administrative Office, for approval by the Board of Trustees.
- B. Representation at Convention: All certified alumni associations shall be entitled to representation at Convention if:
 - a. They have met the requirements set for by Chapter XI, Section 1 of the Laws of Beta Theta Pi.
 - b. They register a delegate with the Administrative Office at least 60 days prior to an announced General Convention.

STEP 1: CONDUCT YOUR SECOND MEETING OF THE ASSOCIATION

As outlined in The Code, annual certification requires the association to host a minimum of two meetings annually* and submit its officers, bylaws and membership roster. These requirements must be satisfied and submitted at least 60 days prior to the General Convention, which is typically held the first week of August to commemorate the Fraternity’s founding.

***IMPORTANT NOTE ON DEFINITION OF “ANNUALLY”:** Two meetings *between submission deadlines*, **NOT** a calendar year (January-December). For example, if Convention falls on August 7, the submission deadline would be 60 days earlier on June 7. This is the day the clock resets back to zero; your association would have to meet twice between June 8 of the previous year and June 7 of the current year in order to be “active” and eligible to vote at the Convention.

STEP 2: SUBMIT YOUR MATERIALS FOR ANNUAL CERTIFICATION

Please submit materials outlined in The Code of Beta Theta Pi (CHAPTER XI, SECTION II seen above) through the annual certification [survey](#). The deadline to submit these materials and certify the association as “Active” and for voting eligibility is 60 days prior to the announced General Convention (see “[Code Requirements](#)”).

Confirmation will be provided shortly after submission from the Administrative Office. The Board of Trustees will review the materials at their next in-person meeting or call. The key contact for the association will be notified if certification was granted or if further information is necessary.

STEP 3: ATTEND THE GENERAL CONVENTION

Please join Beta brothers and alumni associations from across North America at the General Convention for a great time of fellowship, networking, and learning ... as well as an opportunity to refresh your Beta Spirit! There, you will exercise the association's voting privileges as a delegate within the legislation hall – where the important business of the Fraternity is conducted. *Note: Convention is a separate registration process. Visit beta.org/convention for further details.*

OFFICER POSITIONS

Each alumni association can determine the appropriate number of officers and their respective positions/responsibilities. At a minimum, we suggest a president, vice president, secretary, treasurer (if dues or any revenues will be generated through ticketed events, etc.), and new alumni member chairman. As a best practice, the more you can delegate tasks among individuals, the more efficient and effective the association will be.

PRESIDENT

The president is the chief executive officer. He shall facilitate business meetings of the alumni association (and any executive committees), be responsible for appointing all standing and special committee chairmen, serve as the primary contact for communications, maintain communication with the associate director of advancement and Administrative Office, update the officer roster when any changes occur.

PRESIDENT RESPONSIBILITIES (INCLUDING, BUT NOT LIMITED TO):

- Schedule and preside over all meetings of the association
- Ensure the association certifies on an annual basis to remain in “active” status and meets annual certification standards as outlined in CHAPTER XI of The Code.
- Act as a key primary contact for incoming members and the General Fraternity
- Serve as delegate to Beta’s General Convention
- Make sure all officer positions are filled consistent with The Code of Beta Theta Pi, as outlined in this document; assist the VP in onboarding new officers to their respective positions
- Work with the VP to create and execute the annual calendar of activities
- Set a positive and supportive culture that encourages volunteer participation. Lead by example. Avoid egoistic tendencies or any form of “power” hierarchy. Foster interpersonal relationships with your members and officers.

VICE PRESIDENT

The vice president shall run the business meetings in the absence of the president. His two main roles are planning the yearly calendar and facilitating engagement of alumni members in the association. Some groups add committees and chairs reporting to the vice president to have specific members in charge of each meeting and events.

VICE PRESIDENT RESPONSIBILITIES:

- Onboard new officers
- Plan the annual calendar of activities
- Preside over all meetings in the president’s absence
- Facilitate engagement of all members with the new member chair
- Provide constructive feedback to the president on leadership style and organization structure
- Organize and oversee a mentoring program

SECRETARY (RECORDING/CORRESPONDING)

The secretary can have two main roles: record keeping and member communication. Some groups have two separate secretary positions. Record keeping consists of recording minutes for the executive committee and general membership meetings. Corresponding provides general communication to the membership and is responsible for the distribution of all newsletters and notices of meetings. The secretary includes the associate director of advancement at the Administrative Office when sending the chapter newsletter and directory.

SECRETARY RESPONSIBILITIES:

- Maintain accurate records of membership, electronically or by other means
- Keep detailed minutes of all official meetings of the association
- Responsible for all communications to the general membership, including use of the ChapterSpot portal, newsletters, email blasts, invitation reminders, etc.
- Ensure bylaws are up to date and the association is acting in compliance, suggesting updates as necessary

TREASURER

The treasurer has custody of all funds of the organization, shall collect membership dues (should they be issued) and tends to expenditures as authorized by the executive committee. He shall maintain a complete and accurate record of all receipts and disbursements and give reports at membership and executive committee meetings. The treasurer shall file the appropriate paperwork with the IRS (if required). If the alumni association chapter has a scholarship, he is responsible for distributing the check or submitting a request form to the Beta Theta Pi Foundation if the scholarship is endowed.

TREASURER RESPONSIBILITIES:

- Oversee all funds of the association, collect member dues (if applicable) and execute any expenditures as authorized by the executive committee
- Maintain accurate financial records and receipts of the association
- Provide financial reports at all official meetings
- File appropriate IRS paperwork to maintain any separate nonprofit foundation status (if required)
- File appropriate paperwork with governing state body to attain and maintain an incorporated status

NEW ALUMNI MEMBER CHAIR

The primary responsibility of this chair would be to make sure all potential and new alumni members are properly oriented to the alumni association. This includes proactive outreach, communications and ideas on how to promote the association. The new alumni member chair should work closely with the vice president.

NEW ALUMNI MEMBER CHAIR RESPONSIBILITIES:

- Ensure all new and incoming members are properly oriented to the association
- Be proactive in outreach and building relationships for all new members; make sure they feel properly welcomed and are aware of upcoming activities, as well as receiving email updates
- Work with the VP to brainstorm and create new ways to encourage connection and promote the association to local non-active members

COMMUNICATION BEST PRACTICES

The healthiest alumni groups provide opportunities to connect and share information, newsworthy highlights of individual members, and create events to socialize and/or remind members to support local chapters and the General Fraternity.

As an industry best practice, we recommend alumni associations:

- Have an official board meeting at least four times per year.
- Host a minimum of four social alumni association-led events per calendar year (in addition to any local chapter and/or General Fraternity events). These could coincide with board meetings (virtual or in person is acceptable).
- Send a monthly email blast to members, including a request that they send information for future communications. Don't feel like you need to curate content or always know what's going on. Allow members to create content FOR YOU!

SENDING EMAILS

Beta has a contracted partnership with ChapterSpot to use their email platform, Mass Mailer App, because it syncs directly with the Beta Theta Pi database for member contact information. Because of this, it also considers alumni communication preferences. Both chapter-based and geographic-based alumni associations have access to use the Mass Mailer feature to send emails. To access, log in to your [MyBeta profile](#) and click "ChapterSpot", choose your association (if more than one), then click "send emails".

For a full tutorial, please visit the ChapterSpot portal accessed through MyBeta. There you will find tutorial videos for chapter-based and geographic-based alumni associations.

CREATING EVENTS

Currently, ChapterSpot does not have the ability to create an RSVP or charge for tickets to events. Our recommendation is to use [Eventbrite](#) for all events and share the link within ChapterSpot.

To do this, first register for a free account on Eventbrite, create the event on their platform, then copy and paste the event link inside of a ChapterSpot email to distribute to your association. Eventbrite will automatically sync to people's calendars after they RSVP, so they're more likely to attend.

Please refer to the [Appendix](#) for a brief tutorial.

IMPORTANT

- Make sure contact information is up-to-date on [MyBeta](#) and that the appropriate contact is listed in the [Alumni Association Directory](#). Check this semiannually.
- Maintain contact with the local chapter president(s) once a quarter to ensure any chapter events (induction, new member education, recruitment, initiation, etc.) are being properly communicated and broadcasted to alumni association members.
- Send event information to Director of Communication [Martin Cobb](#) to ensure events appear on the official [event calendar](#) and in monthly Beta [e-newsletters](#).



CALENDAR OF EVENTS SAMPLE

The goal of alumni associations is to facilitate connections and relationships for Beta alumni and their families. To best do so, associations should make a point to hold regular gatherings, be it for socializing (happy hour mixers, family get togethers, special events, alumni homecomings, etc.) or to conduct business for the association (such as holding elections, billing alumni dues, amending the Constitution & Bylaws, etc.)

This sample calendar of events should give you a basic roadmap of when social events and business meetings may occur.

EARLY AUGUST

The annual General Convention takes place. Eligible alumni associations send a voting delegate to aid in conducting the business of the Fraternity.

EARLY SEPTEMBER

Alumni Association Annual Kickoff: Reintroduce everyone, discuss association goals, news updates regarding local chapters and Convention/GF, personal story sharing/community discussion (personal challenges, career changes, good news, etc).

MID-LATE OCTOBER – MENTORING KICKOFF

For young alumni, graduating seniors and senior alumni. Fill out survey, a designated alumni association officer sorts through, makes introductions/pairing.

LATE FALL

Invite all to attend the local chapter Initiation Ceremony.

EARLY-MID DECEMBER

Alumni Association Holiday Social Event.

FEBRUARY

Alumni Association members attend area chapter local programming (community service project, game night, fundraiser, speaker, etc.).

MARCH

Local chapter Initiation Ceremony: Invite all to attend.

APRIL

End of academic year check in/meeting: Convention check in.

JULY

Summer BBQ or annual golf tournament.

BYLAWS SAMPLE

XXX AREA ALUMNI ASSOCIATION BYLAWS

ARTICLE I – NAME

The name of this association shall be known as the XXX Area Alumni Association.

ARTICLE II – PURPOSE

The purpose of the XXX Area Alumni Association is to bring together Beta alumni located in and around XXX. By holding regular social and educational events, the association, which operates through its Board of Directors, seeks to build friendships and connections among Beta alumni.

ARTICLE III – MEMBERSHIP

Any initiate of Beta Theta Pi in good standing from any chapter, who resides or intends to reside for at least two (2) months in the greater XXX area, shall at his request become a member of this association.

ARTICLE IV – BOARD OF DIRECTORS

Management of this association shall be vested in the Board of Directors, which shall consist of not less than X (X) members nor more than thirteen (13) XX members, each elected for a term of one (1) year. The Board of Directors shall elect the officers of this Association annually. Vacancies, however created, shall be filled by majority vote of the remaining members of the Board of Directors.

ARTICLE V – OFFICERS

Section 1. Composition. The officers of this association shall include at minimum:

- a) **The president, whose powers and duties shall be those generally delegated to such an officer according to Robert's Rules of Order,**
 - 1) Shall be the principal officer of the association; and
 - 2) Shall preside at all meetings of the association and of the Board of Directors; and
 - 3) Shall be responsible for seeing that the lines of direction given by members of the association are carried into effect and for reporting to the members of the association on the affairs of the association.
- b) **The vice president, whose powers and duties shall be those generally delegated to such an officer according to Robert's Rules of Order,**
 - 1) Shall be responsible for performing the duties of the president, in the absence of the president; and
 - 2) Succeeds to that office in the event of a vacancy.
- c) **The treasurer, whose powers and duties shall be those generally delegated to such an officer according to Robert's Rules of Order,**
 - 1) Shall be responsible for the custody of all monies of the association, and for the disbursement thereof as authorized by the Board of Directors; and
 - 2) Shall be responsible for seeing that accurate accounts are kept of monies received and paid out; and
 - 3) Shall be responsible for preparing and issuing quarterly financial statements to the Board of Directors; and
 - 4) Shall perform such other duties usual to the office.

- d) **The secretary, whose powers and duties shall be those generally delegated to such an officer according to Robert's Rules of Order,**
- 1) Shall be responsible for issuing notices of all meetings of the association and the Board of Directors; and
 - 2) Shall see that the minutes of such meetings are kept; and
 - 3) Shall be responsible for coordinating communication to members of the association, and where deemed appropriate by the Board of Directors, to the entire alumni and undergraduate membership.
- e) **Additional officers and committees, along with the authority delegated to them, may be appointed by the president or the Board of Directors.**

ARTICLE VI – ELECTIONS

The election of officers shall be held annually during the month of January, or at the first meeting of the calendar year, and shall be made by a majority of the members present at this meeting. Nominations for all elected officers shall commence one week prior to this meeting. In the event no single candidate receives a majority, a special runoff vote will be taken to resolve the situation. The timely organization and successful completion of the elections will be the responsibility of the outgoing officers.

ARTICLE VII – MEETINGS

Regular meetings of the association shall be held at least two (2) times per year. A suitable location will be determined by the Board of Directors.

Meetings of the Board of Directors shall be held at least quarterly to discuss the direction of the association and to ensure that the programs and activities continue to support its purpose. A suitable location will be determined by the president. Quorum is established as fifty percent plus one (50% + 1) of the Board of Directors. Motions shall pass and approve business based on a majority of voting members present.

The president shall have the authority at his discretion to call special meetings of the association or the Board of Directors upon adequate notice of the date, time, and place.

ARTICLE VIII – GENERAL CONVENTION PARTICIPATION

The association is entitled to representation at the General Convention of Beta Theta Pi Fraternity if it has met the requirements set forth in Chapter IX, Section 1 of the Laws of Beta Theta Pi and has complied with those requirements to the satisfaction of the alumni affairs commissioner.

ARTICLE IX – FISCAL YEAR

The fiscal year of the association shall be January 1 through December 31.

ARTICLE X – INDEMNIFICATION

The corporation shall indemnify each of its directors or officers or former directors or officers against expenses actually and reasonably incurred by him in connection with the defense of any action, suit or proceeding, civil or criminal, in which he is made a party by reason of being or having been such director or officer, except in relation to matters for which indemnification is prohibited by the laws of XXX.

ARTICLE XI – PARLIAMENTARY AUTHORITY

Robert's Rules of Order Revised shall be the parliamentary authority in all matters not covered by XXX and these bylaws.

ARTICLE XII – AMENDMENTS

These bylaws may be amended by a majority vote of the Board of Directors. The amendment(s) must be submitted to the president in writing at least ten (10) days prior to the meeting on which the suggestion will be discussed and voted upon.

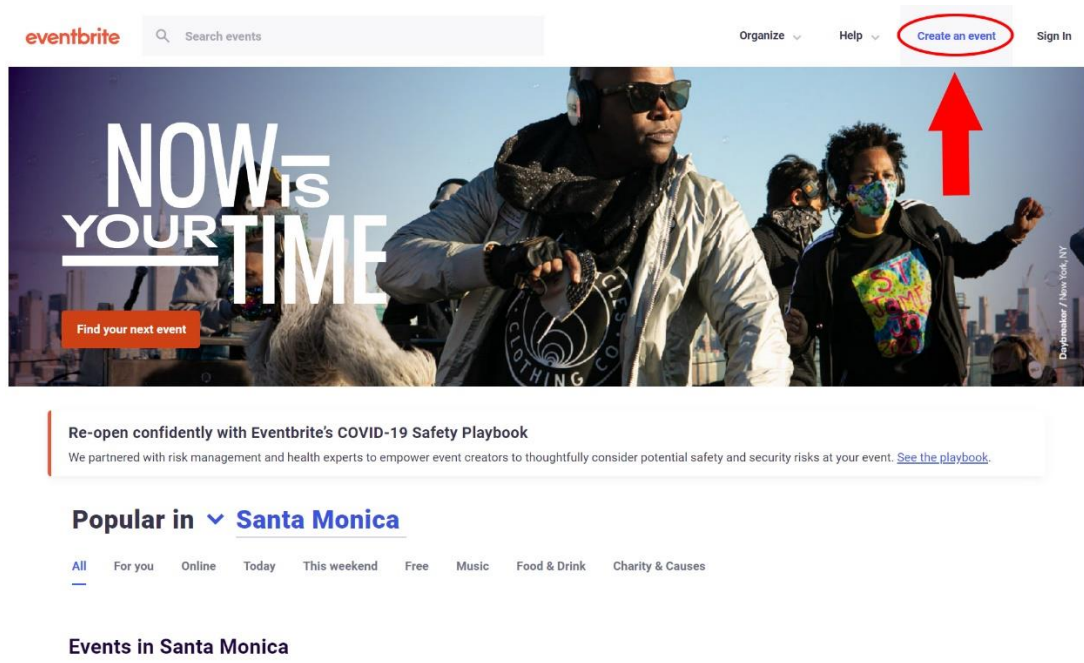
Bylaws ratified on: XX/XX/XXXX

Last modified on: XX/XX/XXXX

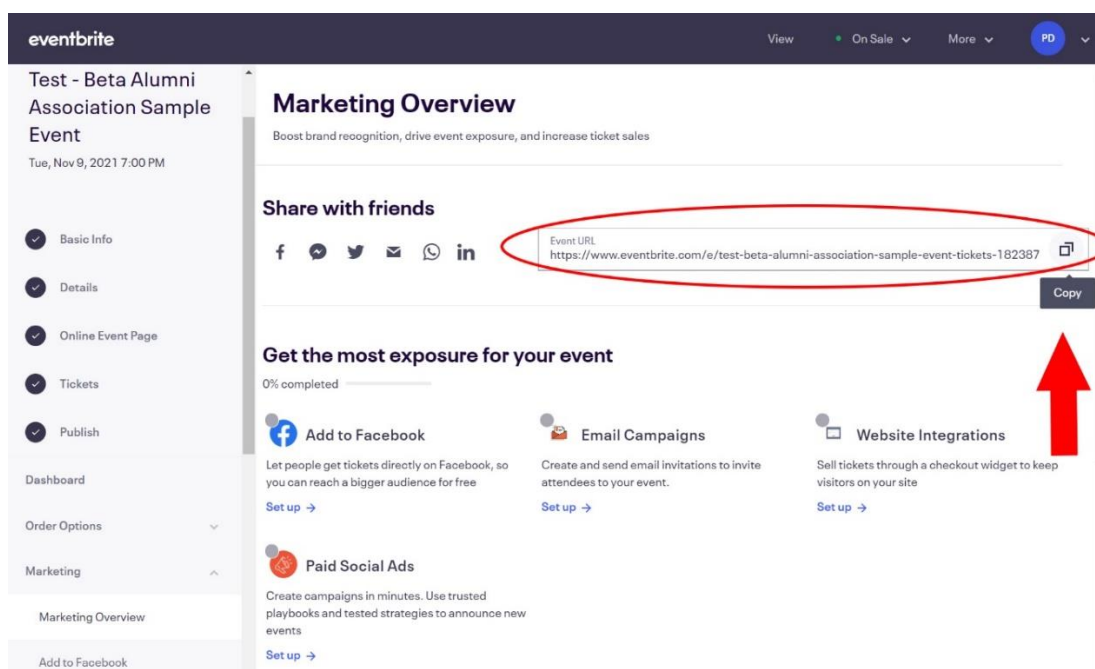
APPENDIX

EVENTBRITE OVERVIEW

STEP 1: Create event on Eventbrite.com



STEP 2: After publishing your event, copy the unique event URL



STEP 3: Log in to My.Beta.org, click “ChapterSpot”, and insert/paste URL into ChapterSpot email for alumni members to RSVP

Compose New Email

Emails / Compose New Email

Template: **Beta Template**
*Required, Choose Template

To: **Everyone**
Send Emails To...
Please note that by selecting "Everyone", you are selecting every person found on your roster including volunteers. Review your roster to confirm that this is the proper selection before continuing. Otherwise, please re-select by status to narrow down this list.

Reply-To: **Type Reply-To Address**
*Optional, Replies will be sent to this address

Subject: **Alumni Event This Saturday!**
Subject of Email

Variables: **Select Variable...**
*Optional, select Variables to insert to Email Body
[What do these variables do?](#)

Email Body: Your draft here is NOT saved anywhere. Please make sure to back it up in case of errors

Dear Alumni, I hope you all can attend this Saturday! Please click the link below to RSVP!
<http://www.eventbrite.com/e/test-beta-alumni-association-sample-event-tickets-182387>
kai