



EVENT PLANNING GUIDE

REVISED JUNE 2023



BETA THETA PI

CORE VALUES

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. All members responsible for planning events for your chapter should also review the following lessons on Lesson 1:

- [Must Haves for Social Events](#)
- [Backward Timeline Program Planning](#)
- [BYOB & Third-Party Checklists](#)
- [Event Planning](#)

Advisors and alumni should be involved in event planning, but especially large events and events where alcohol will be served. Your chapter development consultant, district chief and campus fraternity/sorority professionals can also 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 the chief chapter services officer 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.

Educational credit goes to the former Fraternal Information and Programming Group (FIGP), Pi Kappa Phi Fraternity, the North American Interfraternity Conference, and Holmes Murphy & Associates for portions of this resource.

EVENT PLANNING DETAILS

1. Who is submitting the event planning form?

Organization: _____

Name: _____

Officer Title: _____

Email: _____

Phone: _____

2. Who is involved in the planning of the event?

Executive Officers

President

VP of Risk Management

VP of Programming

VP of Brotherhood

VP of Education

VP of Philanthropy

Other(s): _____, _____

Chapter Advisors

Chapter Counselor

Risk Management Advisor

Programming Advisor

Brotherhood Advisor

Member Education Advisor

Philanthropy Advisor

Other(s): _____, _____

3. Name of event: _____

4. Location of event:

Chapter Facility

Rented Facility (e.g., hotel, restaurant, event venue)

Member(s) Residence

Other: _____

5. Start time of event: _____ a.m. _____ p.m.

6. End time of event: _____ a.m. _____ p.m.

7. Purpose of event:

Recruitment

Social/Mixer

Formal

Philanthropy

Service

Parents/Moms/Dads event

Faculty appreciation

Alumni event

Chapter anniversary

Other: _____

EVENT PLANNING DETAILS

8. 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 fraternities or sororities
List how many groups are attending and their names →
- Event with one or more other student groups
List how many groups are attending and their names →
- 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

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

- Bonfires
- Bounce houses/Inflatables
- Boxing tournament
- Tug-o-war
- Mechanical bulls
- Obstacle courses
- Rock climbing
- Contact sports (e.g., football, rugby)
- Pools (including baby pools)
- Skydiving/parasailing/bungee jumping
- Slip & Slides/Any other water feature
- Building of temporary structures like floats or stages
- 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 approx. 1 hour/60 miles from campus
- Team building events that include makeshift ropes courses, trust falls, blindfolded guided walks, etc.

EVENT PLANNING DETAILS

10. Have any written contracts or agreements been signed for any part of this event?

Yes No

Food caterer

Security guards

Bus/transportation company

Third-party vendor

University facility

Hotel venue

Sports field

DJ

Band

Artist

Restroom and waste management

Other

EVENTS WITH ALCOHOL

Is there alcohol at this event?

Yes

No

How will the alcohol be provided?

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

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 [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.

Bring Your Own Beverage [BYOB]

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. Reminder: hard alcohol (alcohol above .15 ABV) is not allowed at BYOB events.

Planning BYOB

I certify that I have taken the [BYOB and Third-Party Vendors](#) online lesson on Lessonly.

Yes

No

I understand all components of BYOB and confirm the event I am planning will follow all applicable policies.

Yes

No

1. Are there campus policies for on or off campus that impact BYOB events?

Yes

No

2. All members and guests are expected to be checked in, inclusive of getting "ID'd" at the door. Who is responsible for checking guests in and ensuring only attendees of legal drinking age consume alcohol?

Check all that apply:

Executive officers

Chapter members

Advisors

Campus police

Hired security

Other: _____

EVENTS WITH ALCOHOL

3. How are members and guests being marked to identify they are of legal drinking age [someone who is 21+]?

Wristbands

Stamp on hands

Other [Describe]: _____

4. What types of alcohol are guests able to bring and at what quantity (Example: Beer – 6-pack of beer)?

Beer: _____

Seltzers: _____

Wine coolers: _____

Ciders: _____

Malt beverage: _____

Other [Describe]: _____

5. How is the chapter managing the distribution of the alcohol?

Where will the alcohol be distributed from? (This should be a centralized and specific location.)

How many sober monitors will be distributing the alcohol? _____

Who will be sober monitors? Check all that apply:

Executive officers

Chapter members

Advisors

University provides monitors

The chapter has hired additional security

How many drinks will attendees be permitted to take at a time? _____

6. How will attendees check in and collect their alcohol?

Ticket system

Punch card

Other [Describe]: _____

7. How will executive officers and sober monitors ensure attendees are only consuming alcohol they brought and checked in to the event (describe in detail)?

8. After the event concludes, will the leftover alcohol be discarded, or will attendees be able to pick up the next day? What is that process (describe in detail)?

EVENT PLANNING DETAILS

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 [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. Keep in mind that Beta requires 1 sober monitor for every 15 attendees (e.g., event has 150 attendees, the chapter needs to have 10 sober monitors). Additionally, Beta limits the guest to member ratio at 1 member to 3 guests.

Below is a equation you can use to determine what the maximum number of guests per member can be at an event. In order to determine this number, you would take the number of members attending and multiply that by the number of max guests per individual.

An example scenario: A chapter has 50 members but only 42 members are attending the social next Friday. Per Beta Theta Pi's Risk Management Policy, the chapter will allow for 3 guests per member in attendance. The maximum number of guests would be 42 members by 3 guests per member allowing for 126 guests ($42 \times 3 = 126$).

$$\begin{array}{ccc}
 & \times & \boxed{3} & = \\
 \text{Total Members} & & \text{Number of Guests} & \text{Max Number of Guests}
 \end{array}$$

To understand the total number of possible attendees, you would then add your total members attending to your total number of guests. In the example above you would add 42 (total members attending) and 126 (max number of guests). This would equal 168 total attendees.

Then, to determine the number of sober monitors, you would take your total number of attendees and divide that by 15 to follow the Risk Management Policy. Again, in this example you would divide 168 (total attendees) by 15 (follows 1 to 15 ratio of sober monitors) to get 11.2. You should always round up if you do not have a whole number.

Fill out the following portion:

Total Members: _____

Total Members Attending: _____

Number of Guests Per Member: _____

Number of Max Guests: _____

Number of Total Attendees: _____

Number of Required Sober Monitors: _____

EVENT PLANNING DETAILS

When building a guest list, you must account for four things:

- Full name
- Which member is responsible for the guest(s)
- Date of birth of guest
- Check-in and check-out times

Many chapters of Beta Theta Pi will use a Google Sheet or another document that multiple members can access simultaneously and edit in real time. You can use the example table below to manage your guest list. It is incredibly important that you keep track of guests entering and leaving your events. You may also want to consider leaving yourself room for any notes that may be helpful as you manage your list.

Member "R"	Guest Name	Guest Phone #	Date of Birth	Time In	Time Out	Notes
Member 1	Guest 1	800.800.2382	08/08/1839	9:00 p.m.	9:45 p.m.	
John Knox	Jane Doe			9:30 p.m.	10:15 p.m.	Allergic to shrimp
John Knox	Sarah Smith			9:45 p.m.	11:10 p.m.	

Things you may also want to consider adding to your guest list:

- Signature of guest
- Allergies of guest
- Emergency contact for guest
- Any known medical issues (e.g., sensitive to flashing lights)

University or college departments may provide 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, but helps you better track the flow of your event.

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 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.

EVENT PLANNING DETAILS

Sober Monitors

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

Review the "[Must Haves for Social Events](#)" online lesson on Lessonly to review importance of sober monitors and their roles.

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 readily available and accessible. 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 executive officers 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, vice president of risk management and vice president of finance.
- Beta's Administrative Office staff is happy to help review contracts and leases.