

# Substance-Free HOUSING

## Transition GUIDE



BETA THETA PI FRATERNITY



## Introduction

Betas have long believed that true brotherhood is built through shared social experiences that facilitate trust and deep, meaningful relationships. Betas also believe that finding this sense of home within the Fraternity is best achieved when a chapter's environment closely aligns with the organization's values. It is in that spirit that the Board of Trustees adopted a Substance-Free Housing Policy in 2003 for all re/colonizations.

In February 2018, that policy was amended and expanded by the Board of Trustees, then affirmed and moved into the [Beta Theta Pi Risk Management Policy](#) by order of the undergraduate and alumni delegates at the 179th General Convention. These updates are to be carried out in two phases across multiple years, with all Beta homes becoming substance-free by August 2020.

Implementing substance-free housing may, at first glance, be considered a challenge for those chapters needing to establish new norms within their homes. However, as with any major transition, careful planning and a thoughtful approach can make the change less dramatic and, ultimately, more successful in its implementation.

The General Fraternity has created this guide to help chapters work through several steps on the path to successfully operating a substance-free facility.



# Table of Contents

**UNDERSTANDING THE POLICY ..... 4**

- Why was the Substance-Free Housing Policy adopted?
- How did the policy come to be?
- Where do we start?
  - Internal Audit
  - Chapter Update

**IMPLEMENTING THE CHANGE ..... 6**

- Amend Your Bylaws
- Coach the Kai Committee
- Create a Membership Agreement
- Plan Social Events
- Schedule Alumni Events
- Budget Accordingly
- Update Lease

**MAINTAINING THE MOMENTUM ..... 7**

- Recruit Men of Principle
- Check-In on Your Members
- Report Incidents
- Plan Safe Events
- Properly Transition Leadership



## Understanding the Policy

Creating long-lasting change is hard and takes patience, understanding and dedication. For this to happen, everyone – chapter brothers, advisors, alumni and the house corporation – must be on the same page. To help get there, the following are important resources to review and steps to take early in the transition period.

### WHY WAS THE SUBSTANCE-FREE HOUSING POLICY ADOPTED?

The Fraternity's primary responsibility is to create safer environments for our members and their guests. Beta Theta Pi's own data, in addition to data from the greater Greek community, clearly show a correlation between the presence of alcohol, tobacco and drugs and the increase in risk management incidents, deterioration of our facilities, furnishings and individuals' attitudes towards the treatment of our homes. Additionally, roughly 70 percent of undergraduate Betas are under the legal age to purchase and possess alcohol at any given time. Finally, for those who choose to drink, most campus communities offer a multitude of establishments where doing so is safer and presents less risk to our chapters.

### Resources

- [Substance-Free Housing Policy](#)  
Read the Substance-Free Housing Policy in its entirety, including additional rationale and detailed information on changes to the original policy (2003) as adopted by the 179th General Convention (2018).
- [Frequently Asked Questions](#)  
You'll no doubt encounter questions from fellow brothers, parents, Greek peers or campus officials about this important change. Be prepared by reviewing this list of commonly asked questions about the Substance-Free Housing Policy beforehand.

### HOW DID THE SUBSTANCE-FREE HOUSING POLICY COME TO BE?

The policy itself is older than you might think, and the timeline below looks back at the series of events that led to its Fraternity-wide adoption.

- **August 2004** | The Board of Trustees' 2003 policy requiring all new colonies and restarted chapters to implement substance-free housing is enacted.
- **February 2017** | The Board continued its multi-year evaluation of data and research related to alcohol in chapter houses, expansion success under the Substance-Free Housing Policy, rising insurance rates and claims, and experiences of interfraternal peers. The Board solicits broad feedback on potential actions.
- **January/February 2018** | Changes to the Substance-Free Housing Policy are affirmed by the Board and announced as part of a broader set of strategic initiatives.
- **August 2018** | Delegates of the 179th General Convention codify the policy by incorporating it into Beta's Risk Management Policy. Phase one – eliminating hard alcohol and requiring substance-free common spaces – is implemented.
- **August 2020** | Chapters are fully transitioned to substance-free housing.





## WHERE DO WE START?

It's a long road ahead, but all change has to start somewhere. We recommend beginning with an internal audit of current practices and attitudes towards your events, facility and chapter culture. Then, updating your chapter members on your findings and setting new expectations.

### Internal Audit

Take a step back with your team and conduct an internal audit, including reviewing events, current house policies and chapter practices that could lead members to violate the Substance-Free Housing Policy. For instance:

**Annual Events** | What events occurring annually and involving alcohol within the home need to be transitioned?

- If your exec team determines that the event needs to move offsite to a third-party location, consult your Greek life office for local venues that can accommodate you.

**Chapter Home** | Are there large open spaces or built-in bars that encourage drinking?

- Involve your alumni or the Cornerstone Housing Department early on to develop alternative uses for these spaces.
- Changing the home doesn't have to be daunting. Fresh carpet, new lighting, repainting or permanent furniture are simple switches that can make a dramatic impact on the environment.
- Designated Educational Area (DEA) Grants can be a helpful tool to incentivize alumni fundraising. Beta's Cornerstone Housing Department can help with DEA Grants if your house corporation and/or alumni association are interested.

**Chapter Culture** | The Beta Brotherhood Assessment tool (released each fall) will provide your chapter with a data-driven picture of your brotherhood. For a quality analysis, make sure all members complete the survey within five weeks of receipt.

### Chapter Update

Next, have a discussion at your first chapter meeting or hold a special meeting focused on discussing the reasoning behind the change, how the leadership is working towards implementation and the expectations of each member.

- We recommend having advisors, your district/regional chief or an Administrative Office staffer present to help answer questions members may have about substance-free housing.
- Be ready to explain education/resources that the chapter will provide to ensure a smooth transition, as well as any follow-up processes for individuals breaking the new policies.



## Implementing the Change

Once the chapter has reviewed and understands the reasoning behind substance-free housing, it's time to work on transitioning into the policy's first phase. This section will cover how to document changes within your chapter, and how to adjust events and finances accordingly.

### Amend Your Bylaws

Two-thirds of Beta chapters have operated under the Substance-Free Housing Policy for some time – many of them regular winners of the prestigious John Reily Knox Award. One key to their success is the creation and enforcement of accountability measures related to their facility. Beta Mu at Purdue University is one such example of a chapter that has [structured their bylaws](#) with housing accountability measures in mind.

### Coach the Kai Committee

Consider holding a coaching session with all members of the Kai Committee to talk through the importance of the change and holding members accountable to the expectations of a substance-free home.

- Include the local advising team by having them lead the coaching session, which should include a review of the [Kai Committee Guide](#).

### Create a Membership Agreement

In life, it's best when obligations and expectations are clearly expressed in writing. Some of the most successful Beta chapters have been doing just that for years. The [Membership Expectations](#) agreement is a clear and concise way of communicating Beta's standards to your active membership and potential new members. Doing so early on in one's membership creates a simple path for accountability.

### Plan Social Events

Substance-free housing has no impact on your chapter's ability to hold social events, merely the location where they take place. One thing that has not changed is Beta's core value of responsible conduct and this must remain a top priority when planning any activity regardless of venue.

- The Fraternity has developed an [Event Planning Guide](#) for use when planning all chapter-sponsored events.
- Reference the [Third-Party Checklist](#) to plan events using outside vendors.
- Adhere to the easy-to-use [BYOB Checklist](#) when planning applicable events.
- Ask your university for local businesses that may act as third-party vendors at your chapter events (bars, restaurants, country clubs, hotels, etc.)

### Schedule Alumni Events

Under the expanded Risk Management Policy, up to seven alumni events with alcohol





per year are allowed to be hosted in the homes of chapters transitioning to substance-free housing. District chiefs are an integral part of the review and approval process for the events as outlined in the [Alumni Event Approval Checklist](#). Applications are submitted for approval via an online survey.

### **Budget Accordingly**

As legendary coach John Wooden, *Purdue '32*, said: "Failure to prepare is preparing to fail." Budgetary planning is especially important for those chapters that are incurring expenses for third-party vendors for the first time. Restructuring your budget to account for these changes is critical. Your chapter's financial advisor or district/regional chief can help restructure your budget, if needed.

### **Update Leases**

House Corporations should strongly consider asking all live-in members to sign a lease addendum in relation to compliance with the new substance-free policy. A [template has been created](#) for your convenience, which can be modified for your chapter.

## **Maintaining the Momentum**

You know the policy, you've implemented the changes and now you must maintain the momentum. If appropriate steps are taken, the Fraternity believes substance-free housing will lead chapters to perform at their highest possible levels long-term. This section covers areas of chapter operations that will require special attention, such as recruiting new members, planning safe events and effectively preparing and transitioning future leaders.

### **Recruit Men of Principle**

Recruiting new members is about building relationships with men and understanding what they value. While explaining the benefits of joining the Fraternity, you should focus on how this policy makes us different than the "frat" stereotype. In the event the conversation turns to substance-free housing, [here are answers](#) to common questions you may get from potential new members.

### **Check-In on Your Members**

Schedule a membership expectations review with all new and active members once each term. Doing so not only promotes good chapter operations, but also helps members achieve personal growth and accountability. Continue to provide constructive feedback for each member throughout their journey as a Beta.

### **Report Incidents**

Especially during a period of transition, mistakes are going to happen. When they do, timely completing an incident report (the process is reviewed at Keystone and Chapter Presidents Leadership Academy each year) can aid with responses to challenging issues that arise when incidents occur. If you are unsure what justifies the filing of a report, contact your leadership consultant.

### **Understand the Good Samaritan Policy**

Members of Beta Theta Pi, through the value of mutual assistance, are called to help others. In no circumstance should someone withhold assistance due to fear



of reprisal. To that end, [Good Samaritan policies](#) were adopted to assure members and chapters that helping others in distress should be their first priority.

### Plan Safe Events

The goal of the [Safe Event Planning Guide](#) is to help chapters and alumni think critically around event planning. Before every event, run through this checklist and reference campus and IFC policies that govern event planning.

- Holmes Murphy, the Fraternity's insurance broker, also offers [several resources](#) around planning safe events.
- Have your leadership consultant, district chief and campus Greek life office review and offer advice on events or contracts.

### Properly Transition Leadership

The Substance-Free Housing Policy has two separate deadlines for compliance:

- **August 15, 2018** | No hard alcohol within chapter housing, all common spaces must be substance-free (certain exceptions for alumni-hosted events) and beer and wine limited to private bedrooms.
- **August 15, 2020** | Completely substance-free homes (certain exceptions for alumni-hosted events).

These staggered phases virtually guarantee that the responsibility of implementation will extend to several different executive boards. Chapters should prepare future leadership to continue the transition using the following practices.

- Have younger members involved in new programming and any housing renovations. This will ensure that a knowledge overlap exists between generations of members.
- Consider requiring your executive board candidates to complete applications prior to elections. This application process will help you vet the best officers to lead the chapter in the future. And don't be afraid to be direct by including questions about their plans for substance-free housing.
- Hold formal transition retreats facilitated by your local advising team and/or district or regional chiefs. This gives consistency to the transition process and prevents best practices from being lost year-to-year. The Fraternity has prepared an [Officer Transition Guide](#) to help during this process.



---

“Having a dry house has given us a significant advantage in recruiting. It has given us respect from school officials and the rest of campus that other organizations lack. It has turned our chapter house into a place centered around meaningful relationships rather than those that are centered around alcoholic consumption.”

– Matt Stranzl, Elon '19