

# Need-Based Relief Scholarships

## Selection Guidance

Chapters are responsible for selecting member(s) who receive this financial assistance. This document provides guidelines and best practices for the selection process.

### The Selection Committee

The selection committee should consist of 3 – 5 members, including at least one advisor or alumnus. We recommend:

- VP of Finance. The VP of Finance is a good role to chair the committee and manage the process, since he likely already knows the financial circumstances of brothers.
- Financial Advisor. Chapters without involved advisors could ask their district chief to assist.
- Chapter President
- VP of Brotherhood (or Kai Committee Chair)
- Current or former VP of Education (he is likely to know many of the sophomores and juniors, plus seniors from his own class)
- Consider one member from each pledge class, or making sure that the committee has representation from multiple pledge classes

If you already have a committee that gives out a local chapter scholarship, consider using that same group. Keys to success are:

- Being able to convene and work quickly
- People who know chapter members well
- Committee members who respect the confidentiality of the process and members' financial circumstances

The committee cannot request financial or tax documents from members.

### The Selection Timeline

It's up to the chapter to work quickly and get financial assistance to brothers who need it the most. We recommend these steps:

- Select committee members
- Convene committee
- Develop criteria for evaluating applicants
- Develop simple survey or application process and set a deadline for submissions
- Announce process, criteria and deadlines at chapter meeting and follow up with email and text communication to all members and advisors
- Send applications to committee for review; ask members to rank their top choices
- Convene committee to select recipient(s)
- Notify recipient(s) and members who were not selected
- Submit names via this link: <https://survey.alchemer.com/s3/7000370/2022-23-Need-Based-Relief-Scholarship-Recipient-Submission>

The job of the committee is to select the brother(s) who best qualify based on their expressed need compared to the criteria you determine. Use your best judgement and trust the feedback of your brothers.

## What Should the Application Include?

It's completely up to the committee to decide, but we recommend that you keep it simple. Consider asking:

- Full formal name of member. You'll need to submit this to the Beta Foundation and the check will be made out in this name.
- Current address of member. The Beta Foundation will mail checks to this address.
- Cell number of member.
- Year in school.
- Resume.
- Copy of most recent grade report, to confirm GPA.
- And then 2 – 3 questions to discern the member's financial circumstances (see the criteria below to design the questions). You cannot ask the member to submit tax returns, bank statements, credit reports or other highly sensitive financial information. Instead, encourage the member to disclose as much about his circumstances as he feels comfortable sharing.

The application process and the method for collecting information should be confidential. After your committee is finished, the survey and all submitted materials should be deleted.

A sample application is included at the end of this document.

## Criteria for Evaluating Applications

The committee can determine their own criteria, but we recommend keeping the process simple. Consider using these factors and questions as you develop your criteria and application:

- **Is the student on need-based financial aid?**
  - Undergraduates across North America attend college with varying degrees of financial support from their families. Need-based aid is financial aid that is received if you students have financial needs and meet broadly accepted eligibility criteria.
- **Does the student receive other scholarships?**
  - Many students receive funding based on academic performance either in high school or college. This may or may not be based on financial need or family circumstances.
- **Have his family circumstances changed? If so, how is that impacting their ability to pay for dues?**
  - The recent pandemic caused widespread unemployment and disruption to many sectors of the economy, which impacts jobs. Parents who previously paid for fraternity dues may no longer be able to do so.
- **Does the student work? Has his employment been impacted by hardships? How does that affect his ability to pay for tuition, room or board?**
  - Many students work but some of those jobs, like working in the rec center or at a local restaurant, may have been eliminated.
- **How has the member paid for dues in the past?**
  - Research shows that about two-thirds of Betas have some or all of their dues paid by someone else – typically parents or grandparents. About one-third of Betas pay for dues on their own. Learning how a member paid for his membership before any hardships will help the committee understand the impact of recent changes.
- **What is the member's past dues history?**
  - The committee should consider whether the member paid his past dues on time or whether he was frequently late. In addition, the committee should consider whether the member has asked for Temporarily Inactive Status for financial reasons in the past.
  - Has the chapter extended other financial relief to this member in the past, or offered him reduced dues?

- **Does he meet other membership expectations?**
  - The committee should consider whether the member fulfills other expectations. Does he maintain a good GPA? Does he attend chapter meetings and other mandatory events? Does he behave consistent with Beta's values? Does he contribute in meaningful ways to the chapter? In a nutshell: Is he a good member that you want to keep in the chapter?

If you have questions about your committee, your application or your criteria, a member of Beta's Administrative Office staff can help. Contact Zane Carlson, Associate Director of Advancement ([zane.carlson@beta.org](mailto:zane.carlson@beta.org); 800-800-2382).

# Need-based Relief Sample Application

## A brief self-assessment of financial need

### Pre-Qualification

Please answer the following questions to help determine if you should be considered for a need-based relief scholarship.

1. I have exhausted all other available financial resources, including family support.
  - a. Yes
  - b. No
2. I have critical need(s) in one or more of the four areas of: food, shelter, medical needs, and/or employment-critical transportation.
  - a. Yes
  - b. No
3. I understand I may be asked to explain my financial circumstances to the selection committee. \*
  - a. Yes
  - b. No

*\*An explanation of financial circumstances will help selection committee better understand why you're seeking need-based relief. You are not expected to provide any financial or tax documents, only to provide a summary overview of your financial circumstances. Use your best judgement to provide the information that you comfortable sharing. All information is confidential.*

If you answered "Yes" to all the questions above, please continue to the questions below to help you collect your thoughts and prepare a case for support for the chapter's designated selection committee.

If you answered "No" to any of the questions above, you may continue to the next section to help you better assess what your case for support may be. However, you may wish to consider if there are other options available to you before seeking this need-based support.

### Reflection Questions

1. Do any of these apply to my current financial situation?
  - a. I recently lost my job and/or source of income
  - b. I am having trouble obtaining enough food for myself and/or my family
  - c. I have been required to relocate and do not have the resources to do so
  - d. I do not have a permanent place to stay
  - e. I was recently in an accident and/or have unforeseen medical expenses
  - f. I am currently in an unsafe living situation
  - g. Other
  - h. None of these apply to my current situation
2. Are any of these resources currently available to me?
  - a. Income from a job
  - b. Income from other sources (i.e. stipend)
  - c. Financial assistance from family or friends that does not need to be repaid
  - d. Loans from family or friends that are expected to be repaid
  - e. Temporary place to stay with family or friends

- f. Financial aid, grant assistance, or scholarships
- g. Public benefits (e.g., Social Security, SNAP)
- h. Veteran benefits (self or from spouse or parent/guardian)
- i. I do not have access to any of these resources.

### **Open-Ended Questions**

How have your financial circumstances been impacted recently?

How has your financial hardship(s) impacted your financial circumstances?