

# BETABASE FREQUENTLY ASKED QUESTIONS FOR ALUMNAE CLUBS

*This document is intended for alumnae club officers as we prepare for the transition to BetaBase.*



## BETABASE OVERALL

### WILL MEMBERPLANET STILL BE AN OPTION FOR OUR CLUB TO USE?

After June 30, memberplanet will no longer be accessible to clubs and members. In July, we will launch BetaBase which will offer all club management needs in one integrated portal. Within BetaBase, alumnae clubs will manage their member and officer rosters, view reports, invoice dues and other fees, send mass email communications, manage club websites, and more! If your club would like to export historical data out of memberplanet, we recommend you do so before June 30. You can [watch this tutorial](#) for guidance on how to export information from memberplanet!

### ARE ANY BETABASE TRAINING WEBINARS PLANNED, OR WILL TRAINING BE COVERED IN EMAILS?

A full suite of training options will be provided to clubs and chapters at launch. Pi Phi plans to offer a variety of options for onboarding, including live webinars, prerecorded trainings, resource guides, support articles, a live help desk—as well as support from the entire Headquarters (HQ) Alumnae Services Team.

### CAN BETABASE BE USED BY ALUMNAE CLUBS IN CANADA AND OTHER LOCATIONS OUTSIDE THE U.S.?

BetaBase will be available to all alumnae clubs, including those in Canada and other locations outside the U.S. BetaBase will offer Canadian and international clubs the ability to manage their roster, communicate with members, create a club website and more. There may be limitations on how clubs with Canadian or international bank accounts can use the dues invoicing tool in BetaBase to collect member dues and fees. More information will be coming soon on dues collection for Canadian and international clubs.

### SHOULD WE ENCOURAGE OUR CLUB MEMBERS TO UPDATE THEIR CONTACT INFORMATION BEFORE BETABASE LAUNCHES?

Yes! All members are encouraged to confirm their contact information in their [pibetaphi.org](http://pibetaphi.org) member profile before June 25, 2024. If your club has updated contact information for members that you would like assistance updating, please send it to [alumnae@pibetaphi.org](mailto:alumnae@pibetaphi.org).



## I'VE HEARD THERE IS A "FREEZE PERIOD" BETWEEN JUNE 25 AND JULY 22, 2024. WHAT IS THIS?

On June 25, Pi Phi will begin our final data export from our current database to our new database, Salesforce. This is a common occurrence in any database transition. After that date, many of the systems that currently interact with our database will be turned off. This includes activities such as updating your Member Profile, Sister Search, alumnae dues payments, and eReports. Once members begin accessing the new portal, BetaBase, in July, database activities will be restored. Pi Beta Phi has planned for this period and the general member will likely not notice significant disruptions. We recognize that the freeze will create limitations for alumnae clubs and appreciate your patience during this transition.

## CLUB ROSTER MANAGEMENT

### WHAT IS THE DIFFERENCE BETWEEN A PARTICIPATING MEMBER ROSTER AND PROSPECTIVE MEMBER ROSTER?

One of the most exciting updates BetaBase offers is a new, streamlined way for clubs to manage their membership rosters. Each club will have a participating member roster and a prospective member roster in the portal. A participating member roster is the club's primary roster and includes alumnae who are active participants in the club. A prospective member roster includes individuals who reside in the club area, but have not opted to participate in the club yet. The new system will ensure we classify clubs based on actual membership size and in a way that reflects the true reach of the club's base of participating members. It will also allow for smoother club management in the portal by club leaders.

### WHAT IS THE GOAL OF CREATING A PARTICIPATING MEMBER ROSTER?

After talking with leaders from more than 30 alumnae clubs, it was clear clubs have taken on the responsibility of creating participating member rosters in addition to the zip code-based lists currently provided through eReports (which include both participating club members, prospective club members and inactive alumnae residing in the defined club area). Having a participating club roster in BetaBase will help clubs stay organized and give club leaders an extra tool for segmenting and communicating with their members—some clubs may even choose to provide extra events or perks for participating club members.



WILL THE PARTICIPATING CLUB ROSTER BE OUR CLUB'S MAILING LIST FOR COMMUNICATIONS TO OUR MEMBERSHIP? WILL NON-PARTICIPATING LOCAL ALUMNAE BE EXCLUDED FROM OUR CONTACT LISTS IN BETABASE?

BetaBase will provide club leaders with the opportunity to communicate with all alumnae in their geographic area (similar to the current "zip code roster" in eReports). Club leaders will be able to communicate with both participating and prospective members and also segment alumnae for different purposes. For example, you might send regular club correspondence to participating members, but expand your audience for occasional marketing emails and broader invitations to all alumnae in your geographic region, including non-responsive and/or prospective club members.

CAN SEASONAL MEMBERS BE INCLUDED IN OUR LIST OF PARTICIPATING CLUB MEMBERS?

Yes! All participating club members, even those who engage seasonally can be included on your participating member roster. Members will have the option to insert seasonal address information within their profile if they choose once BetaBase is live.

WILL WE HAVE ACCESS TO SEASONAL DATABASE INFORMATION?

It will be up to each individual member to update their seasonal information in their BetaBase member profile. Club leaders will be able to view each member's address in their club roster.

## CLUB DUES/EVENT INVOICING

WILL BETABASE ASSIST WITH COLLECTING AND RECORDING LOCAL DUES?

Yes! BetaBase will allow clubs to invoice local and international dues and other club billings.



## WILL BETABASE BE ABLE TO TAKE CREDIT CARDS FOR EVENT PAYMENTS?

Yes! Members can use credit cards to pay for dues, event fees and other club billings right in the BetaBase portal.

## OUR CLUB STARTS SOLICITING MEMBERS FOR DUES STARTING AT THE END OF JUNE. HOW WILL THE BETABASE TRANSITION IMPACT THIS TIMELINE?

Electronic payments for the 2025 year will be available in BetaBase at launch. For the full membership, they'll begin accessing the portal and paying dues electronically on July 25, 2024. Your club can accept offline check payments and enter them manually into BetaBase after launch. It is highly recommended that clubs wait until members are in the portal to begin accepting dues payments.

## WILL THE FEE STRUCTURE CHANGE FOR TRANSFERRING MONIES TO LOCAL CLUBS FOR LOCAL DUES PAID AT THE INTERNATIONAL LEVEL?

The goal is to simplify this process, but full details are not worked out just yet.

## CLUB COMMUNICATION

### CAN OFFICERS SEE IF MEMBERS HAVE OPTED IN/OUT OF PI PHI COMMUNICATION? IS THERE AN OPTION TO DIFFERENTIATE BETWEEN OPT IN/OUT OF THE LOCAL CLUB EMAILS VERSUS OVERALL PI PHI HQ?

Clubs will be able to view members who have opted out of Pi Phi communication via their member profile. When a member opts out of Fraternity communication, it is not distinguished between Fraternity and club communication.

### WILL CLUB OFFICERS BE ABLE TO COMMUNICATE WITH SEGMENTS OF THEIR CLUB MEMBERSHIP?

Absolutely! Clubs will be able to communicate to their full participating member roster, prospective member roster and additional segmented distribution groups through the platform's mass emailer tool.



OUR CLUB EXCLUSIVELY USES MEMBERPLANET FOR MEMBER COMMUNICATIONS. WILL WE NEED TO ARCHIVE INFORMATION SUCH AS PAST INVITATIONS, EMAILS, STATISTICS ON EMAILS OPENED, ETC.?

Yes, we recommend clubs export important communication information from memberplanet before June 30. Clubs who utilize the communication feature in memberplanet are encouraged to save content in a Word file, along with any graphics or photos used in the platform. [Watch this tutorial](#) on how to export information from memberplanet! Once we transition to the new system, past communications will no longer be accessible.

WILL WE BE ABLE TO GENERATE CUSTOM EMAILS AND EXPORT EXCEL SPREADSHEETS FROM THE NEW SYSTEM?

Yes! BetaBase's mass emailer tool allows clubs to design customized messages to be sent to their members, including their full membership, prospective members and also segmented distribution groups.

WILL MEMBERS ON OUR ACTIVE CLUB ROSTER BE ADDED TO PI PHI EMAIL COMMUNICATIONS?

The "active member" roster submitted by an alumnae club will be used to update the club's membership roster in the new database. As a separate step, individual member data will be migrated to the new system. All members with known email addresses will initially receive communications from the Fraternity with the launch of the new database, at which point members can set their communication preferences in the new system. This is separate from—and unrelated to—a club's submission of active club rosters.

WILL CLUB LEADERS BE ABLE TO UPDATE CONTACT INFORMATION (INCLUDING EMAILS, ADDRESSES AND COMMUNICATION PREFERENCES) AT A MEMBER'S REQUEST?

With any database, it is important that the member has access to update their own information—both contact information and communication preferences. Pi Phi will always ask the member to make these updates within their own profile.



## CLUB WEBSITES

### ARE THE WEBSITES IN MEMBERPLANET GOING AWAY?

After June 30, memberplanet websites will no longer be available. Clubs will now be able to manage their club website directly in the BetaBase portal. We encourage clubs to set up their websites after launch in July.

### WHAT INFORMATION DO WE NEED TO GET FROM OUR MEMBERPLANET WEBSITE PRIOR TO THE TRANSITION TO BETABASE?

Prior to June 30, clubs should save any copy, photos or graphics from their memberplanet site—whether you plan to include the content on your new site or simply don't want to lose the information.

### WILL WE BE ABLE TO CUSTOMIZE OUR CLUB WEBSITE?

The new system provides a simpler, easy-to-use site builder. Similar to memberplanet, each website can be customized with copy and photos specific to your club. If desired, clubs can also add custom pages to their site.

