

Zeta Beta Tau

A Brotherhood of Kappa Nu, Phi Alpha, Phi Epsilon Pi, Phi Sigma Delta, Zeta Beta Tau

Legacy Policy (from ZBT Code, Revised 2/21/12)

Title 3, Chapter 3, Section 1 — Membership Selection. Each undergraduate unit shall have complete autonomy as to the selection of its members, consistent with the provisions of the Constitution. Notwithstanding the provisions of this Section, Chapters and Colonies shall extend an invitation of membership to all identified Prime Legacies (sons, grandsons, and brothers of the same Chapter/Colony) and of First Priority Legacies (sons, grandsons, and brothers of any ZBT Chapter/Colony) who receive the affirmative vote of more than 50% of the Chapter or Colony members in good standing, present and voting at the meeting at which such legacies are presented. In the event that Prime Legacies or First Priority Legacies fail to receive an invitation of membership, the Chapter or Colony President shall be obligated, within 72 hours of such decision, to contact the alumnus brother, father, or grandfather of the legacy rushee to discuss the Chapter's/Colony's decision. (Adopted 1992 by the Convention)

Steps for compliance (Updated August 2017)

1. You are required to give a legacy the opportunity to demonstrate value.
2. You are encouraged to contact the International Headquarters when made aware of legacies locally.
3. You are required to contact the Executive Director or his designee if a legacy may not receive a bid.
 - This is to discuss the recruitment experience for the legacy, the concerns the chapter/colony has with the legacy and the decision to not extend him a bid and what steps still need to be taken in order to follow the policy.
4. You are required to vote on all identified legacies and document the result.
5. You are required to contact the International Headquarters with legacy results after voting.
 - This is to review the results and connect the chapter/colony with any affected Brothers.
6. You are required to contact the Brother in the event his legacy does not earn a bid.
7. You are encouraged to contact the Brother in the event his legacy does earn a bid.

As passed at the July 2017 meeting of the Supreme Council, the legacy policy is applicable for any legacy identified at least one week prior to the start of organized recruitment activities. Failure by a chapter/colony to comply with the legacy policy will result in a fine equal to the current initiation fee compounded per incident of non-compliance. This fine may be waived via an appeal process to the International Headquarters prior to bids being extended.

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Legacies – What Chapters Need to Know

International Policy

- Chapters have autonomy over membership selection, provided they comply with ZBT policy as outlined in the [ZBT Code](#), Title 1, Chapter 7 (Membership), and Title 3, Chapter 3 (Legacies).

Who is a legacy?

- Prime Legacies are sons, grandsons, or brothers in the same chapter/colony
- First Priority Legacies are sons, grandsons, or brothers from any chapter/colony
- Uncles, nephews, cousins, and step-relatives are not considered legacies per ZBT policy, but should still be recommended and considered for membership

How is a legacy identified?

- Headquarters may be notified through the website or by current brothers
- Advisors may be notified by the current brother
- Undergraduates may be notified by the current brother or legacy on campus

How should a legacy be contacted?

- Depending on contact information shared, this may be in person or by phone, email, or social media
- A designated brother (recruitment chair or his designee) should be responsible for legacy outreach

How should a legacy be extended a bid?

- A simple majority vote (50% +1) at a membership selection meeting is the benchmark for legacies
- This may or may not differ from the chapter's/colony's overall recruitment plan
- The actual bid offering should be consistent with the chapter/colony process for all bid offers

What if a legacy is not extended a bid or does not accept a bid?

- The chapter/colony president must contact the International Headquarters and speak with the Executive Director (or his designee) to discuss the decision and appropriate next steps
- The chapter/colony president is also required to contact the brother, father, or grandfather regarding the chapter's/colony's decision to not extend a bid or the legacy's decision to decline the bid

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Legacies – What Advisors Need to Know

International Policy

- Chapters have autonomy over membership selection, provided they comply with ZBT policy as outlined in the [ZBT Code](#), Title 1, Chapter 7 (Membership), and Title 3, Chapter 3 (Legacies).

Who is a legacy?

- Prime Legacies are sons, grandsons, or brothers in the same chapter.
- First Priority Legacies are sons, grandsons, or brothers from any chapter.
- Uncles, nephews, cousins, and step-relatives are not considered legacies per ZBT policy, but should still be recommended and considered for membership.
- Legacy recommendations may come to the chapter via Headquarters, advisors, or other brothers

How do I advise my chapter on the legacy policy?

- Reach out to your staff liaison with any specific questions you may have regarding handling legacies.
- Speak with the recruitment committee and executive board about the policy every year as a reminder.

What are the requirements for a legacy to be extended a bid?

- A simple majority vote (50% +1) at a membership selection meeting is the benchmark for legacies.
- This may or may not differ from the chapter's/colony's overall recruitment plan.
- The actual bid offering should be consistent with the chapter/colony process for all bid offers.

What role should I have with the chapter's legacy recruitment process?

- You should meet with any legacies along with the legacy's recruitment contact to discuss their experience and connection to the chapter.
- It is important to maintain ongoing dialogue with the chapter regarding the legacy's status. If the chapter is reluctant to contact the legacy, ask for specific tangible reasons for not considering him.
- If after multiple discussions, the chapter cannot provide tangible reasons for a lack of contact, discuss the concept of "Brotherhood for a Lifetime" and the incongruence of not recruiting a legacy.
- If you feel the legacy is not receiving adequate contact from chapter leadership, notify Headquarters.

What if a legacy is not extended a bid or does not accept a bid?

- Before the vote, you should have an idea of where the legacy stands with regards to the bid process.
- Identify any challenges the chapter faced with recruiting the legacy prior to his bid vote.
- If the chapter made sufficient efforts to reach out, and the reasons for not extending a bid are driven by Brotherhood Quality Standards, ensure the chapter president is aware of the required follow up:
- The president must contact the International Headquarters and speak with the Executive Director (or his designee) to discuss the decision. You may be on this call if you feel it is appropriate.
- After speaking with the Headquarters, the president is also required to contact the brother, father, or grandfather regarding the chapter's decision to not extend a bid or his decision to decline the bid.

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Legacies – What Legacies Need to Know

International Policy

- Chapters have autonomy over membership selection, provided they comply with ZBT policies related to recruitment and legacy identification.

My relative is a ZBT. Am I a legacy?

- Sons, grandsons, or brothers from **the same chapter** are considered **Prime Legacies**
- Sons, grandsons, or brothers from **any chapter** are considered **First Priority Legacies**
- Uncles, nephews, and cousins are **not considered legacies** per ZBT policy, but are regularly recommended for membership

How should I get connected to the chapter?

- Have your relative complete a ZBT membership referral form at <http://zbt.org/component/content/article/25>
- Email zbt@zbtnational.org your name, contact information, as well as the contact information, alma mater, and relationship of your relative
- If there is a ZBT chapter on your campus, reach out to the chapter directly to introduce yourself
 - You can get contact information from your campus's Greek Life website, the chapter's social media, or ZBT Headquarters
- If there is not a ZBT chapter on your campus, contact Brian Hoffman, Director of Organizational Growth, regarding the possibility of establishing ZBT on campus
- In these cases, the earlier ZBT is made aware of your legacy status, the higher likelihood you have of continuing the ZBT experience in your family

Headquarters and/or the chapter have been contacted. Now what?

- Depending on the method of identification and contact information provided, the chapter will be in touch with you as soon as possible
- Be yourself, get to know the brothers, understand the ZBT experience, and demonstrate how you will continue to uphold the values of ZBT through lifelong membership!
- If you have questions regarding the selection process, you can reach out to the chapter, advisor, or ZBT Headquarters

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Legacies – What Brothers Need to Know

International Policy

- Chapters have autonomy over membership selection, provided they comply with ZBT policy as outlined in the [ZBT Code](#), Title 1, Chapter 7 (Membership), and Title 3, Chapter 3 (Legacies).

I'm a ZBT. Is my relative a legacy?

- Sons, grandsons, or brothers from **the same chapter** are considered **Prime Legacies**
- Sons, grandsons, or brothers from **any chapter** are considered **First Priority Legacies**
- Uncles, nephews, and cousins are **not considered legacies** per ZBT policy, but should still be recommended for membership

How can I make sure my legacy gets connected to the chapter?

- Complete a ZBT membership referral form at <http://zbt.org/component/content/article/25>
- Email zbt@zbtnational.org your legacy's name and contact information along with your name, alma mater, and relationship to your legacy
- If there is a ZBT chapter on campus, encourage your legacy to reach out to the chapter in order to identify himself
- If there is not a ZBT chapter on campus, encourage him to contact Brian Hoffman, Director of Organizational Growth, regarding the possibility of establishing ZBT on campus
- In these cases, the earlier legacies are identified, the higher likelihood they are able to continue the ZBT experience within your family

Headquarters and/or the chapter have been contacted. Now what?

- Depending on the method of identification and contact information provided, the chapter will be in touch with your legacy as soon as possible
- If you have questions regarding your legacy's status throughout the selection process, you can reach out to the ZBT Headquarters

How will I know if my legacy joined ZBT?

- If he is offered and accepts a bid to join ZBT, hopefully you are among his first contacts!
- If he does not join ZBT, the chapter president will be in contact with you regarding your legacy's membership selection process from the chapter's perspective