

BETA PHI MU  
**Handbook**

**National Headquarters**  
**05/11/2021**



**Beta Phi Mu**  
**Honor Society**

TABLE OF CONTENTS

INTRODUCTION 2 OVERVIEW 3-4

BY-LAWS Beta Phi Mu By-Laws 5 Local Chapter By-Laws 5 Chapter By-Laws Sample 6-7

BETA PHI MU OFFICERS, DIRECTORS, COMMITTEES, AND VOLUNTEERS 8-9 LOCAL CHAPTERS

AND NEW CHAPTER INSTALLATION 10

MEMBERSHIP INFORMATION – FOR CHAPTERS 11 Criteria for Membership 11 Models for Member Selection Process 11-13 Sample Nominee Invitation Letter 14

Forms for Chapters 15 Chapter Initiation Procedures 15 Membership Fees 15-16 Copy of Initiation Ritual 17-18

MEMBERSHIP INFORMATION – FOR LIS PROGRAMS WITHOUT ACTIVE CHAPTERS 19-20

MEMBERSHIP INFORMATION – HONORARY MEMBERS National Level Honorary Members 21 Chapter Level Honorary Members 21

MEMBERSHIP INFORMATION – PROFESSIONAL MEMBERSHIPS 22

SUGGESTIONS FOR MAINTAINING AN ACTIVE CHAPTER

Chapter Standing and Communication 23 Chapter Activities 23-24 Chapter Records 24-25

TAX EXEMPT STATUS AND IRS FILINGS 26 SCHOLARSHIP INFORMATION 27 PUBLICATIONS OF

BETA PHI MU 28 NATIONAL HEADQUARTERS 29

## 1

### INTRODUCTION

The purpose of this Handbook is to serve as a resource for local Beta Phi Mu (BPM) chapters by detailing essential information necessary for the smooth functioning of the chapter and its relationship to the National Headquarters. The responsibilities of National Headquarters, hereafter referred to as Headquarters, and of the local chapters are detailed in a number of sections below. This Handbook will also assist new advisors and officers of local chapters in better understanding BPM and the relationship between Headquarters and chapters.

Information is also provided for representatives of LIS programs without an active chapter, but which nominate BPM members at-large.

This Handbook was previously updated in January, 2020. Updates to this new edition (May, 2021) of the Handbook include:

- An updated version of the official Beta Phi Mu initiation ritual (pages 17-18).

## BETA PHI MU OVERVIEW

**Founding**

Beta Phi Mu was founded in 1948 by a group of leading librarians and library educators to recognize and encourage scholastic achievement among library and information studies students at the University of Illinois. Beta Phi Mu was formally admitted to membership in the *Association of College Honor Societies* (<http://www.achsntl.org/>) in 1969 and became an affiliate of the *American Library Association* (<http://www.ala.org/aboutala/affiliates/affiliates/current>) in 1998.

**Purpose**

Beta Phi Mu recognizes the scholastic achievement and leadership potential of library and information science graduates, and fosters the values of scholarship, leadership, and service in its members.

## **Name and Motto**

Our name comes from the initials of the Greek words *Bibliothekarios philax mathesis*, meaning “librarians are the guardians of knowledge.” Our motto, *Aliis inserviando consumor*, meaning “Consumed in the service of others” was selected by the founders based on the concept of the dedication of librarians and other information professionals to the service of others.

## **Insignia**

The insignia of Beta Phi Mu is the dolphin and anchor, mark of the Venetian printer Aldus Manutius. Enamel pins bearing the Beta Phi Mu insignia are available to members for purchase from the national office through the “Merchandise” section of the BPM website (<http://www.betaphimu.org/merchandise.html>).

## **Eligibility**

Regular Membership: Eligibility for regular membership in Beta Phi Mu is by invitation of the faculty from institutions where the American Library Association, or other recognized accrediting agency approved by the Beta Phi Mu Executive Board, has accredited or recognized a professional LIS degree program. New members must also meet the minimum 3.75 GPA requirement, and no more than 35% of a graduating class may be invited. [Please note that the percentage of eligible graduates was officially increased by board vote in 2018. This is in line with ACHS guidelines for specialized degree programs.] Complete eligibility requirements can be found in the by-laws, Article III (<http://www.betaphimu.org/by-laws.html>) and the “Membership” section of the BPM website: <http://www.betaphimu.org/membership.html>. See also the “Membership Information” section of this Handbook, p. 11.

## 3

Honorary membership: Honorary memberships are available at both the chapter and the national level. Specifics on honorary membership can be found in the BPM By-laws, Article II, Sections 5 and 6 (<http://www.betaphimu.org/by-laws.html>). See also the “Membership Information—Honorary Members” section of this Handbook, p. 21.

Professional membership: Professional membership is meant for people who meet the qualifications of membership but did not join at the point of graduation. To see all of the requirements for professional membership, and to access the link to the online professional membership application form, visit the “BPM Membership” page at: <https://www.betaphimu.org/membership.html>. See also the “Membership Information—Professional Members” section of this Handbook, p. 22.

4  
BY-LAWS

**Beta Phi Mu By-Laws**

Beta Phi Mu is governed by a set of by-laws which covers topics such as membership criteria, officers, committees, membership meetings, and chapters. The most recent revisions of the by-laws were made in 2016; the complete by-laws are posted online in the "BPM BY-LAWS" area in the "ABOUT" section of the BPM website: <http://www.betaphimu.org/by-laws.html>.

## **Local Chapter By-Laws**

Local chapters of the society should develop and maintain Chapter by-laws. Chapters are encouraged to send a copy of their by-laws, or an active link to their by-laws on the web, to Headquarters whenever the by-laws are established or revised. Chapters should post their by-laws on their website if they have one; links to active chapter websites can be found by clicking hot linked chapter names in the “BPM CHAPTERS” area in the “ABOUT” section of the BPM website: <http://www.betaphimu.org/chapters.html>  
Sample by-laws from the Beta Beta Theta Chapter can be found on the following pages.

### **Chapter By-Laws Sample:**

#### **Beta Beta Theta Chapter of Beta Phi Mu**

##### **By-laws**

#### **Article I. Name**

1. This organization shall be known as the Beta Beta Theta Chapter of Beta Phi Mu at the University of Iowa School of Library and Information Science.

## **Article II. Purposes**

1. The purposes of Beta Beta Theta Chapter of Beta Phi Mu are to recognize scholastic achievement in the study of librarianship and to support appropriate professional and scholarly projects.

## **Article III. Membership**

1. Any member of Beta Phi Mu in good standing, who elects membership in Beta Beta Theta Chapter, is eligible.
2. Membership in Beta Phi Mu may be conferred by Beta Beta Theta Chapter in accordance with the by-laws of Beta Phi Mu.
3. Honorary membership in the Chapter may be conferred in accordance with the by-laws of Beta Phi Mu.

## **Article IV. Officers**

1. The officers, who must be members in good standing of the Chapter, shall be a president, a vice-president who will be president-elect, and a secretary-treasurer. These officers, together with the immediate past president, and faculty adviser, *ex officio*, shall constitute the Executive Council.
2. The officers shall be elected by a simple majority vote of those members present and voting at the annual business meeting, with those elected taking office at the conclusion of the meeting.
3. Officers shall serve a term of office until the adjournment of the business meeting at which their successors are elected.
4. Vacancies in office shall be filled by a vote of the remaining members of the Executive Council. Such appointees shall serve until the next annual business meeting.
5. The president, vice-president/president-elect, and secretary-treasurer shall perform the customary duties pertaining to their offices and such other duties as may be approved by the Executive Council. The president-elect shall serve the first year after election as vice-president, the second year as president, and the third year as immediate past president.

## **Article V. Faculty Adviser**

1. The director of the School of Library and Information Science of The University of Iowa, or the director's designated appointee, shall serve as faculty adviser of Beta Beta Theta Chapter and be an *ex officio* member of the Executive Council.
2. The faculty adviser represents the Chapter in Academic matters at The University of Iowa and advises in all activities of the Chapter.

## **Article VI. Representative to the Advisory Assembly**

1. The representative to the Advisory Assembly of Beta Phi Mu shall be a regular member of the Chapter, appointed by the president with the approval of the Executive Council. The Assembly representative shall not serve for more than six consecutive years.
2. The duties of the representative are to participate in the meetings of the Advisory Assembly and to report its deliberations to the members of the Chapter.

## **Article VII. Committees**

1. The standing committee shall be the Nominating Committee. Other committees may be designated and appointments made thereto at the discretion of the Executive Council.
2. The president shall appoint a Nominating Committee of two members. The Nominating Committee shall secure at least one nominee for each office to be elected at the annual meeting, secure the consent of the nominees in advance, and report the nominations for officers at the meeting.

**Article VIII. Meetings**

- 1. Meetings, to include an annual business meeting, shall be called by the president with the consent of the Executive Council.
- 2. Those regular members present shall constitute a quorum.

**Article IX. Initiation**

- 1. Regular initiation of new members will be held in conjunction with the annual business meeting. Additional initiation ceremonies may be held as deemed necessary by the Executive Council.

**Article X. Dues**

- 1. Dues for Beta Beta Theta Chapter shall be assessed annually by the Executive Council and shall be set every year by the vote of the membership. The fiscal year of the chapter shall be June 1 through May 31.

**Article XI. Amendments**

- 1. These by-laws may be amended by a simple majority of members in good standing who are present and voting at the annual business meeting, provided that the proposed amendments have been made available by the Executive Council to members at least two (2) weeks in advance of the meeting at which they are to be considered.

**Article XII. Parliamentary Authority**

- 1. *Robert’s Rules of Order* (Revised), in the latest edition, shall govern the Chapter in all cases to which it can be applied and in which it is not in conflict with the by-laws of the Chapter or of Beta Phi Mu.

**Article XIII. Dissolution**

- 1. Assets

Upon the dissolution of the Beta Beta Theta Chapter of Beta Phi Mu, assets shall be distributed to the Joyce Hartford Scholarship Fund in the School of Library and Information Science at The University of Iowa to be awarded to a deserving incoming student with plans to become a library and information professional.

- 2. Archives

All Beta Beta Theta Chapter of Beta Phi Mu archival material shall be placed on permanent file with the University Archives within the Collection of the School of Library and Information Science, The University of Iowa Libraries, Iowa City, Iowa.

**Adopted June 16, 1989**

**Article X. revised May 17, 2009**

**Article XIII. added December 24, 2012**

*(Re-printed here with permission from Beta Beta Theta Chapter, September 2014)*

**Officers and Directors**

The Executive Board consists of a President, Vice-President/President-elect, immediate Past President,



Treasurer, two Directors-at-large, and four Directors elected by the Assembly. The Board members must be regular members of Beta Phi Mu. Other criteria for Board membership can be found in Article IV and VII of the by-laws (<http://www.betaphimu.org/by-laws.html>). All initiated members are eligible to vote for officers and directors of the national Executive Board.

Lengths of terms of office for the elected officers are outlined below:

The President is elected for a three-year term, serving the first year as Vice president/President-elect, the second year as President, and the third year as immediate Past-president. There is a limit of two terms for this office.

The Treasurer is elected for a three-year term.

Directors-at-large are elected for terms of two years and may be elected for no more than two consecutive terms. To provide for continuity, terms should be staggered so one Director-at-large is elected each year.

Directors are elected by the Assembly at each annual meeting. Two Directors are elected each year and serve a two-year term on the Executive Board.

The most current list of national officers is available online on the “BPM Executive Board” page in the “About” section of the website (<http://www.betaphimu.org/executive.html>).

## **Committees**

Beta Phi Mu by-laws call for the establishment of three standing committees:

**Nominating Committee:** The Nominating Committee shall present a slate of qualified nominees for elective offices as required by Bylaws, Article IV, Sec. 5, and suggest qualified candidates for appointments to fill vacancies. The Committee shall consist of the immediate Past-president, who will serve as chair, and two other members.

**Scholarships and Grants Committee:** The Scholarships Committee shall consist of at least three members and be chaired by a board member appointed by the President. The chair shall serve as liaison with the President and Executive Board.

**Scholars Series Editorial Board:** The Scholars Series Editorial Board shall advise the series Editor on manuscripts for publication. The Board consists of at least four members and the series editor. The Editor, appointed by the president with the approval of the Executive Board for a term of five years, shall serve as the chair of the Editorial Board. The Editorial Board members shall be appointed to the Editorial Board by the Editor with the approval of the Executive Board for terms of five years.

## **8**

Beta Phi Mu’s by-laws also provide guidance on the establishment of ad hoc committees:

Ad hoc committees may be appointed at the discretion of the President, upon authorization of the Executive Board, or by recommendation of the membership. Number of members, designation of a chair, and charge and instructions shall be at the discretion of the President unless specified in

the directions. Members shall serve until the purpose of the committee is accomplished and final report is received.

### **Volunteers**

Beta Phi Mu Committees are normally chaired by an Executive Board member, but may include non Executive Board members as part of the committee membership. If you would like to volunteer for committee service or to volunteer in other ways, please contact Headquarters.

### **Local Chapters**

As described in Article XI (<http://www.betaphimu.org/by-laws.html>), Beta Phi Mu promotes its activities

through local chapters affiliated with one or more library and information studies programs.

Each chapter is encouraged to choose one representative to serve in the Assembly (currently convening at the Beta Phi Mu Business Meeting and Member Reception held in conjunction with the American Library Association Annual Conference each year). The Assembly acts as an advisory body for the Executive Board, as well as the liaison between chapter and Headquarters. Each chapter chooses the representative in accordance with its own by-laws. The term limit is six consecutive years. More information about the role of the Assembly and its importance to the local chapters can be found in Article IX of the BPM by-laws.

Chapter offices usually consist of such roles as: President, Vice President/President Elect, Secretary, Treasurer, and/or other offices deemed useful by the chapter and reflected in their by-laws. Chapter officer information (names, email addresses) should be kept up-to-date with BPM Headquarters. Our chapter leadership mailing list is Headquarters' connection to chapters and important honor society information is conveyed by this means. Anyone agreeing to serve as a chapter officer must also agree to share their contact information with Headquarters.

Active chapters will be invoiced for a \$125 chapter assessment fee each January, with payment expected by September 1st of each year.

A list of all active chapters is available on the "BPM CHAPTERS" page in the "ABOUT" section of the website (<http://www.betaphimu.org/chapters.html>) and includes local chapter officers and contact information.

### **New Chapter Installation**

The formation of a local chapter is granted by the Executive Board once the Board has received a petition signed by 25 regular members of Beta Phi Mu and a letter of authorization signed by the Dean or Director of the accredited program. Local chapters are assigned Greek letters by the Executive Board at the time of the chapter's installation. Please refer to Article XI of the BPM by-laws for more information (<http://www.betaphimu.org/by-laws.html>).

Following the granting of the chapter charter, the President of Beta Phi Mu, a Past President, or a voting member of the Executive Board designated by the President will be responsible for the installation of the chapter. In recent years, installation of new chapters has taken place during the BPM Business Meeting and Member Reception held in conjunction with the ALA Annual Conference.

### **Chapter Membership**

It is important that all LIS programs and their chapters follow the approved criteria regarding election of

new members in Beta Phi Mu. This section provides the criteria for membership, some models for accomplishing the membership selection process, and links to the necessary forms for chapters to complete.

### **Criteria for Regular Membership**

Membership in Beta Phi Mu is open to graduates of accredited and approved graduate level programs in library and information science (LIS). This includes students completing master's degrees in LIS or related approved graduate degree programs, including students completing Ph.D. degrees in LIS and related fields. Criteria for membership in Beta Phi Mu essentially has three elements:

1. All nominees must have at least a 3.75 grade point average (GPA) on a 4.0 scale.
2. All nominees must have the endorsement of faculty from their program regarding their potential for professional leadership and contributions to the field.
3. No more than 35% of the annual graduating class may be nominated for membership. Please note that this means that membership is selective for most programs. Not every graduate meeting the GPA requirement will necessarily be nominated; faculty input is necessary for selecting the top candidates.

### **Models for the Membership Selection Process**

Because circumstances are unique to each degree program and its setting, there is not necessarily a "one size fits all" model for how to conduct the membership selection process. This section is intended to provide some general guidelines for this process, which individual chapters should feel free to adapt to their own needs.

Each chapter should have a chapter advisor to serve as the liaison between the LIS program faculty and administration, the chapter leadership, and BPM headquarters. Normally the chapter advisor has been a faculty member, but a staff member can serve as well. The advisor should be an elected, professional, or honorary member of BPM. The chapter advisor normally takes the lead in initiating the BPM membership selection process. What follows are examples of procedures which have been successfully used by some chapters.

1. Timeframe – there is no required timeframe for selection of nominees, but selection should take place on at least an annual basis for a chapter to remain active. Most chapters select nominees once or twice a year. A minority of chapters have other time frames that work for their situations.

2. The chapter advisor or designee should obtain a list of all graduates with a GPA of 3.75 and above for the time period under consideration. This list will serve as the "first cut" for identifying potential nominees for BPM membership.

3. The list of GPA-eligible graduates should be made available to all LIS and other interested faculty within the program for comment and feedback. Some models for feedback which have been successfully used are: a) circulation of the list to faculty for comments, then compiling comments and re-circulating the list for voting by the faculty; b) review of the list by a faculty appointed committee, which will bring forward names for nomination to be voted upon by the full faculty; or c) circulation of the list to faculty with a request for nominations, then compiling nominations for voting by the faculty. Other ways of receiving faculty input can be devised, but receiving input from the broadest possible base is preferable.
4. Once feedback and voting has taken place and a final list of no more than 35% of the graduating class is obtained, the selected graduates should be invited to join Beta Phi Mu—which means those who accept nomination are members of both the national organization and the local chapter. Normally, the invitation to membership is coupled with an invitation to the chapter’s local initiation ceremony (although some programs may hold an annual initiation ceremony while nominating new members more than once a year). New chapter members may participate in the initiation ceremony conducted at the BPM Business Meeting and Member Reception, held in conjunction with the ALA annual meeting, if they were unable to attend their chapter initiation ceremony. This option could be included in the invitation.
5. Current BPM lifetime membership fees are US\$100 for domestic US addresses and US\$115 for non-US addresses. Chapter treasurers, in conjunction with chapter leadership and chapter advisor, are responsible for collecting the BPM lifetime membership fee, along with any chapter membership fees assessed. Chapters who charge chapter membership fees usually do so in the range of \$10-\$30 per year. A designated chapter representative (normally the treasurer, secretary, advisor, or other representative) should take responsibility for forwarding all required forms and fees to BPM Headquarters.
6. While there is no deadline for a nominee accepting the invitation to join BPM, most chapters will have a deadline for response to the initial invitation in preparation for their initiation ceremony or other purposes. The chapter representative is responsible for providing the following materials to BPM headquarters:
  - a. membership application forms for all new members;
  - b. a check for \$100 X number of new members, made payable to “Beta Phi Mu”; and c. a list of graduates nominated for membership (whether they have accepted or not). For all necessary forms, see <http://www.betaphimu.org/forms.html> and the list of forms on page 15.
7. Programs are encouraged to forward their materials to Headquarters in a timely manner. Long delays can mean new members frustrated by not having their membership acknowledged, and in worst case scenarios, losing track of members who move following graduation. In order to avoid such problems, the BPM Executive Board has instituted a policy requesting that chapters send all materials requested in #6 above to Headquarters by **June 30** (for Fall initiates) and **September 30** (for Spring initiates) each year.

8. Upon receiving the required materials from the chapter, BPM Headquarters sends out

membership certificates and new member welcome packets to all members paying their lifetime membership fees. New members are entered into the membership database and added to the members email list. The list of nominees is kept on file at Headquarters in case a nominee who did not join later decides to accept the invitation for membership.

- 9. Chapters should keep copies of the initiation report, each new member's application form, and a list of eligible people who declined the invitation, in addition to sending these materials to Headquarters.**

## Sample Nominee Invitation Letter

“{Insert Date}

Dear {graduate name},

The {Insert Program Name} at {Insert Institution Name}, in recognition of your outstanding academic performance and leadership qualities, has nominated you to join Beta Phi Mu, the International Library and Information Studies Honor Society. Membership is by invitation only and is extended to those students who earn a graduate degree in Library and Information Studies and achieve a minimum grade point average of 3.75. Invitations for membership are based upon academic eligibility and a faculty assessment of candidates’ professional leadership potential.

A one-time initiation fee of \$100.00 entitles you to a lifetime membership in the national organization, along with the privileges of voting, holding office, and chapter affiliation. Your membership will also be acknowledged with a membership certificate suitable for framing. If you wish to join Beta Phi Mu at this time, please complete the form enclosed with this invitation, and mail the form along with a check or money order payable to {Insert either chapter’s name or Beta Phi Mu here} to:

{Insert appropriate address}

Your invitation to join Beta Phi Mu is open-ended which means you may join at any time in the future. For more information about Beta Phi Mu, visit [www.betaphimu.org](http://www.betaphimu.org). We look forward to hearing from you and offer congratulations on your notable achievement.

Cordially,

XXX Chapter

Beta Phi Mu”

**\*Chapters should edit this paragraph to reflect local names and practices; for instance, if the chapter collects extra fees for scholarships, or has an annual dues, etc. Don’t forget to include information about the initiation!**

## Forms for Chapters

### 1) Membership Form

Use this form for new inductees who are US residents and have been elected by the local chapter.

#### International Form

Use this form for non-US residents who have been elected by the local

### chapter. 2) Chapter/Institution List of Nominees

Use this form to report all nominees for the reporting time period (at least once on an annual basis), whether the invitation was accepted or not.

### 3) Chapter Initiation Report

Use this form to report all new members who have accepted the invitation to join and have paid their fees. Include all new members, whether they attend initiation in person or not.

Up-to-date copies of all forms are available online on the “FORMS” page in the “MEMBERS’ AREA” section of the Beta Phi Mu website (<http://www.betaphimu.org/forms.html>).

Forms and fees should be returned to Headquarters in as timely a manner as possible. Post-graduation is a time of transition for many people, who may be moving to take new jobs or otherwise be in transit. Prevent returned welcome packets by sending materials as soon as possible to Headquarters and preventing addresses and other contact information from becoming “stale.”

## Chapter Initiation Procedures

Each chapter determines the time and place of its own initiation ceremony. The most current revision of the Initiation Ritual (found below on pages 17-18) involves the chapter president and three other chapter representatives.

Each chapter should light (either literally or symbolically, depending upon fire codes and regulations) their lamp of knowledge prior to the initiation and have new initiates sign their Great Roll at the end of the ceremony.



The ceremony can be followed by a reception, meal, or other activity, such as an address by a guest speaker. You are highly encouraged to send pictures and a write-up of the initiation event and activities to Headquarters for inclusion in the Newsletter.

### **Membership Fees**

We understand that newly graduated LIS students may find it difficult to afford the lifetime membership fee associated with Beta Phi Mu membership. It is important to understand that this is a single, lifetime membership fee, and that the cost extended over a lifetime is fairly minimal. These are some of the steps that can be taken in order to address the financial burden on new members:

- In order to encourage acceptance of BPM nominations, some LIS programs subsidize all or part of the lifetime membership fee for their graduates

15

- Some chapter advisors or LIS programs have “loan” options to help graduating students with membership fees
- Arrangements can be made with BPM Headquarters to pay fees by credit card, so that the payment can be extended over time
- Arrangements can be made with BPM Headquarters to make partial payment of membership fees by credit or debit card, or by PayPal account; please note that membership status is not official until membership fees are paid in full

**Copy of Initiation Ritual**

BETA PHI MU INITIATION RITUAL

PRESIDENT

We meet here today to honor those who have met the highest standards of scholarship in their programs of study and whose records indicate that they will contribute significantly to the development of the library and information professions. The obligations of membership in our international honor

society include a continuing interest in research, scholarship, and leadership. In an information society we have a right to expect that the most talented graduates will demonstrate a willingness to use their talents in service to that society. In accepting membership in Beta Phi Mu, you commit yourselves and your talents to the promotion of the best in scholarship and service, and undertake to assume a leadership role.

In order that you may understand our common purposes, our first representative will explain our commitment to scholarship.

#### FIRST REPRESENTATIVE

Since its inception in 1948, Beta Phi Mu has promoted scholarship through the maintenance of high standards for admission to its ranks, through publications distinguished for their content and design, through important lecture series in its chapters, and through the support of scholarships and continuing education initiatives. Our society has also encouraged scholarly endeavor through support of the first few volumes of the *Journal for Library and Information Science Education* during the centennial of the American Library Association. Our Beta Phi Mu Scholars Series of monographs with Rowman and Littlefield continues this tradition.

Our name, Beta Phi Mu, contains the initial letters for Greek words which can be translated, "Librarians are the guardians of knowledge." However, our purposes have always been broader than that of information professionals in libraries working to preserve scholarship of others. Indeed, this purpose is indicated by our insignia, the dolphin and anchor of the Venetian printer, Aldus Manutius, whose small books of Greek and Latin classics provided the world of his day with greater access to information, information that can take many forms and be provided through any number of initiatives. Aldus stated that he had made a vow to devote his life to public service. That service ideal has never been more important than it is in our present world. Therefore, our next representative will speak of our commitment to service.

#### SECOND REPRESENTATIVE

Our motto indicates that service to others is one of our major commitments. That service can and does assume many forms and occurs in many types of libraries and information agencies, as well as in the cognate disciplines. Allied with scholarship, service can and does extend the boundaries of knowledge to all members of our constituencies. Our next representative will speak to you about leadership.

#### THIRD REPRESENTATIVE

Those who have the potential for scholarship and service have a special obligation to develop leadership for their profession. Since your scholarship has already been demonstrated, more can be expected of you than of others. In all periods of history the demand for leadership has been greater than the supply. That is no less true today. An information society requires specially gifted persons to provide solutions not only to the technical but also to the human problems. From you we expect our future leaders to emerge. In Beta Phi Mu we look forward to working with you in achieving our common goals.

### 17

#### PRESIDENT

As the lamp is the ancient symbol of learning, Beta Phi Mu adopted it for our initiation ceremonies. Learning must overcome ignorance as light overcomes the darkness. We ask you to accept this symbol of our dedication to the spread of knowledge and understanding throughout the world. For we hold, with Thomas Jefferson, that no republic can be ignorant and free.

I now ask you to signify acceptance of these ideals by signing the Great Roll as your names are called.  
**[Call each new initiate by name]**

**[After all have signed]**

We now declare you members of Beta Phi Mu. Our members will now come forward and welcome you to our honor society.

**MEMBERSHIP INFORMATION – FOR LIS PROGRAMS WITHOUT ACTIVE CHAPTERS**

Approved Library and Information Studies programs without an active chapter are encouraged to nominate BPM members at-large from among their graduates.

Headquarters annually contacts LIS programs that are accredited by the American Library Association (or

other accrediting agency approved by the Executive Board) but which do not have an active chapter, to request the names and contact information for at-large nominees. These programs should use the same criteria and procedures for nominating new BPM members as used by chapters (see pp. 11-12). Criteria for membership in Beta Phi Mu essentially has three elements:

- 1) All nominees must have at least a 3.75 grade point average (GPA) on a 4.0 scale. 2) All nominees must have the endorsement of faculty from their program regarding their potential for professional leadership and contributions to the field.
- 3) No more than 35% of the annual graduating class may be nominated for membership.  
Please note that this means that membership is selective for most programs. Not every graduate meeting the GPA requirement will necessarily be nominated; faculty input is necessary for selecting the top candidates.

Once nominees have been determined, a representative of the LIS program should send a list of nominees, along with their contact information (email addresses and/or mailing addresses), to Headquarters ([headquarters@betaphimu.org](mailto:headquarters@betaphimu.org) or PO Box 292992 Davie, FL 33329). It is requested that at-large programs send these lists at least annually, by **June 30 and/or September 30** each year. Headquarters then sends an invitation and membership form to the at-large nominees. A certificate of membership and welcome packet is issued to new members once Headquarters receives their membership forms and lifetime membership fees. A list of those accepting the nomination can be provided to the program representative upon request.

Some programs prefer to send BPM at-large invitations to their graduates directly. These programs should first contact Headquarters to make sure that they are providing up-to-date and accurate information and the correct at-large membership form to their nominees. These programs must also provide a list of nominees to Headquarters for our records. See the "Chapter/Institution List of Nominees" form at <http://www.betaphimu.org/forms.html>.

This is not encouraged, but if the program collects membership fees directly, they are responsible for forwarding membership applications and lifetime membership fees for each new member to Headquarters in a timely manner, just as an active chapter would. See pages 11-15 in this Handbook for details.

New members-at-large may participate in the initiation ceremony held during the ALA Annual conference. Headquarters will post information on the BPM website "EVENTS" page (<http://www.betaphimu.org/events.html>) about the annual BPM Business Meeting and Member Reception prior to the ALA annual conference. Members wishing to participate in the initiation ceremony should RSVP to Headquarters.

Programs without an active chapter and advisor are encouraged to name a particular faculty or staff member to serve as a contact point for communications with BPM Headquarters.

Programs without an active chapter are also encouraged to start or re-activate a chapter at their

institution! For more information, see “LOCAL CHAPTERS AND NEW CHAPTER INSTALLATION” on p. 10 of this Handbook, and contact Headquarters ([headquarters@betaphimu.org](mailto:headquarters@betaphimu.org)).

### **National Level Honorary Memberships**

The by-laws of Beta Phi Mu allow, under certain conditions, for the initiation of Honorary Members into the Society. Such membership is reserved for individuals who have made “significant contributions” to the purposes of Beta Phi Mu. This phrase has been interpreted by the Executive Board as meaning “contribution of world significance” with the expectation that very few such memberships will ever be granted. In other words, in a Society built on “excellence,” Honorary Membership can represent only excellence within excellence, a status which very few will attain or can claim. Guidelines for nominating individuals for Honorary Membership are found in Article III, Section 5 of the by-laws:

<http://www.betaphimu.org/by-laws.html>

### **Chapter Level Honorary Memberships**

The by-laws of Beta Phi Mu also allow for local chapters to initiate honorary members and they may determine their own criteria for this purpose. Chapter Honorary Members are not recognized at the National Level. Article III, Section 6 describes this distinction: <http://www.betaphimu.org/by-laws.html>. Honorary members who wish to seek full membership within BPM should apply for professional membership, if eligible. See p. 22 of this Handbook for more information on the professional membership category.

## MEMBERSHIP INFORMATION – PROFESSIONAL MEMBERSHIPS

### **Professional Membership**

Professional membership is meant for people who meet the qualifications of membership but did not join BPM at the point of graduation. This may be due to graduating from a program that was not actively nominating members at the time or not being nominated due to nomination caps. Nominated graduates may also have chosen not to join at the time and the record of nomination has subsequently been lost. Faculty members in LIS programs and LIS professionals who are outstanding in the field and wish to be more closely affiliated a chapter or program in their area are encouraged to apply.

Professional membership has all same the privileges of regular membership. Professional members must meet the same minimum GPA of 3.75 from an accredited or recognized LIS program, provide letters of recommendation, and show evidence of having made a distinctive contribution to the profession. To see all of the requirements for professional membership, and to access the link to the online professional membership application form, see the "BPM Membership" page at:

<https://www.betaphimu.org/membership.html>.



## SUGGESTIONS FOR MAINTAINING AN ACTIVE CHAPTER

**Chapter Standing and Communication**

All BPM chapters are sub-units of the national organization and operate under a charter from the national organization. As such, it is imperative that chapters maintain communication with BPM Headquarters. All active chapters are listed on the BPM website at: <http://www.betaphimu.org/chapters.html>. Any changes to the information included there should be emailed to Headquarters by a chapter official or submitted via the online contact form at <http://www.betaphimu.org/contact-form.html>.

In addition to the regular email mailing list for all BPM members, Headquarters maintains an email mailing list specific to chapter leadership. This list is used to send important news, updates, and reminders that affect the functioning of BPM chapters. All chapter leaders must share their current email address with Headquarters so that they can be included on this list.

Chapter leaders must also take responsibility for sharing information about their chapter with

Headquarters. Such information includes lists of new nominees and initiates, notifications of changes in chapter advisors, new chapter officers and their contact information, copies of local newsletters, and news of chapter activities and events. It is expected that chapters send a representative to make an oral report at the Beta Phi Mu Business Meeting and Member Reception at ALA Annual each year, and send written reports of chapter activities to Headquarters for inclusion in the newsletter. If a chapter is out of communication for an extended period of time and/or is not regularly forwarding new membership applications and fees for their chapter, their active status may be revoked by the BPM executive board.

### **Chapter Activities**

One of the most common questions we receive at Headquarters is “how can we make our chapter more active?” This is a difficult question to answer, as each chapter’s situation is different. However, there are certain characteristics that active chapters seem to share:

- Multi-generational membership of both recent graduates and not-so-recent graduates •  
Strong ties to the LIS program at their home institution, including:
  - A clear presence on the program’s website
  - Chapter news shared with faculty and current students
  - BPM promoted at orientation, information included in orientation packets, etc.
  - BPM activities that include current LIS students and recent alumni
- Active and engaged leaders and a supportive chapter advisor

Chapter advisors have a particular responsibility for maintaining connections and communication with the LIS program and the wider home institution. BPM Headquarters provides a tri-fold brochure that chapters may download, print, and share with incoming students or at events. See the “FORMS” page in the “MEMBERS’ AREA” section of the BPM website (<http://www.betaphimu.org/forms.html>).

### 23

Some suggestions for chapter activities may be found by reading chapter reports in the BPM newsletter, *The Pipeline* (see <https://www.betaphimu.org/newsletter.html>). Activities that tie into the Beta Phi Mu values of scholarship, leadership, and service are particularly encouraged. Some activities engaged in by BPM chapters have included:

- Sponsoring speakers on professional or service-related topics
- Fundraising for scholarships on the local or national level
- Fundraising for conference attendance grants for members or current LIS students •  
Sponsoring a paper panel at a state or regional professional association meeting •  
Presenting a poster concerning BPM at a state, regional, or local meeting or event •  
Mentoring partnerships with current LIS students
- Sponsoring “speeding dating” informational conversations between LIS professionals and current LIS students
- Participating in local or institutional events such as hackathons or Wikipedia editathons •

Volunteering for local events or activities such as book festivals, books-to-prisoners programs, summer reading celebrations, etc.

- Annual dinner/luncheon/reception, often paired with an initiation ceremony, to welcome new chapter members
- Happy hours or other social events to encourage networking among members

We always welcome hearing about new ideas and activities from chapters that can be shared with others.

### **Chapter Records**

One of the most difficult tasks for both local chapters and Headquarters is maintaining current contact information for members. When local chapters receive change-of-address or contact change notices from its members, Headquarters should also be notified of those changes.

Effective local chapters maintain accurate and current records of their activities. Chapter records are generally maintained by the chapter advisor. Details of some forms of essential items that a chapter must maintain are listed below.

- Chapter by-laws
- Membership files
  - Copies of member application forms
  - Lists of chapter nominees
- Current contact information for chapter members
- Names and contact information for chapter advisors, chapter officers, and standing committee members
- Minutes of chapter and executive board meetings
- Treasury Information
  - Annual Budget
- Bank Statements
- Audit reports or annual financial summary
- Yearly calendar
- Local scholarships or other activities
- Initiation ritual, Great Roll, and location of the lamp
- Procedures for nominating new members and for communicating with Headquarters •  
Publicity efforts

## TAX EXEMPT STATUS AND IRS FILINGS

Beta Phi Mu is recognized by the IRS as a 501(c)(3) tax-exempt entity. However, there are still annual IRS filing requirements for Headquarters as well as the chapters. Headquarters annually fills out IRS Form 990, which is the long-form reporting mechanism for exempt organizations. As with all 501(c)(3) organizations, these forms are considered public information and may be accessed via GuideStar (<http://www.guidestar.org>) and other aggregators of such information. Headquarters also annually

submits a form to the IRS listing all active chapters, along with their contact information and Federal Employer Identification (FEID) numbers.

The FEID number for Beta Phi Mu Headquarters is 23-7369338. The Tax Exempt Status intention for Beta Phi Mu and its chapters and Executive Board are found in Article 13 of the by-Laws (<http://www.betaphimu.org/by-laws.html>). Beta Phi Mu Headquarters is considered the parent organization by the IRS and the active chapters of Beta Phi Mu are its subordinate units. Therefore, it is important that chapters identify themselves not as "Beta Phi Mu," a designation exclusive to Headquarters, but rather as "[Greek Name] Chapter of Beta Phi Mu," with your correct chapter name inserted. This is particularly important for IRS documentation.

Most active chapters of Beta Phi Mu have obtained their own non-profit status by filling out IRS form 1023 and obtaining their own FEID number. In order to maintain non-profit status, chapters must file an annual statement with the IRS. If your chapter's non-profit tax status is in good standing, normally all that is required is filling out the 990-N electronic postcard return. This is very quick and easy! More information and a link to the e-postcard can be found here: [http://www.irs.gov/Charities-&-Non-Profits/Annual-Electronic-Filing-Requirement-for-Small-Exempt-Organizations-Form-990-N-\(e-Postcard\)](http://www.irs.gov/Charities-&-Non-Profits/Annual-Electronic-Filing-Requirement-for-Small-Exempt-Organizations-Form-990-N-(e-Postcard)) If your tax status is not settled or if you have revenues in excess of \$50,000, you should file the 990-EZ form (this is a four-page form, and is relatively easy). Links to this form, instructions for filling it out, and other helpful information can be found here: <http://www.irs.gov/uac/About-Form-990EZ>

The IRS normally asks for the "Group Exemption Number" or GEN when you submit your annual statement. This is the number which links your Chapter filing to Headquarters as the parent organization. The Beta Phi Mu Group Exemption Number or GEN is 2552.

If you have questions about your chapter's tax status, filing requirements, or other tax-exempt matters, please contact Headquarters and we will try to help you or we will direct you to where you might find help.

Scholarships and Fellowships are awarded annually by Beta Phi Mu; the scholarship application season runs from November 15 to March 15 of the following year. Winners are announced at the BPM General Assembly held in conjunction with the ALA Annual meeting in June. Recipients are selected by the Scholarship Committee. Requirements for each scholarship, along with the amount of the awards are

posted online at <http://www.betaphimu.org/scholarships.html>.

- Sarah Rebecca Reed Scholarship  
The Reed scholarship is awarded to a student beginning library or information studies at an ALA accredited school.
- Harold Lancour Scholarship for Foreign Study  
The Lancour scholarship is awarded to a librarian for research or a special course of study to survey foreign libraries or programs outside North America, and/or to conduct research in a foreign country outside North America.
- Frank B. Sessa Scholarship for Continuing Professional Education of Beta Phi Mu Members  
These \$150 awards are an exclusive benefit of Beta Phi Mu membership. They are intended to help underwrite the cost of approved professional development activities engaged in by BPM members. Ten awards are made each year; five in March and five in September.
- Blanche E. Woolls Scholarship  
The Woolls scholarship is awarded to a student beginning Library and Information Studies at an ALA-accredited school with the intention of pursuing a career in school library media service.
- Eugene Garfield Doctoral Dissertation Fellowship  
Up to six of these fellowships are awarded each year to doctoral students who are working on their dissertations in Library and Information Science, Information Studies, Informatics, or a related field.

Chapter and individual members' donations to help support BPM scholarships are always welcomed, and may allow us to increase the number of awards granted. See the "Donations" page online for more information: <http://www.betaphimu.org/donations.html>.

Individual chapters may also sponsor or contribute to scholarship initiatives at their home institutions. Chapters are free to administer their scholarships individually, in consultation with their home institution and its requirements.

Beta Phi Mu currently sponsors (or has sponsored in the past) several publications, each of which is detailed below.

### **Beta Phi Mu Newsletter – *The Pipeline***

Beta Phi Mu publishes *The Pipeline*, a semi-annual newsletter, which is available electronically on the Beta Phi Mu website (<http://www.betaphimu.org/newsletter.html>). Contributions for the newsletter (chapter news & events, pictures of chapter initiations and other activities, member news, etc.) should be sent to Headquarters. Please provide captions for pictures and/or clearly identify those appearing in them.

### **Local Newsletters**

Some chapters also publish newsletters for their own members. Such chapters are encouraged to send Headquarters a copy of, or a link to, each issue.

### **Beta Phi Mu Scholars Series**

Beta Phi Mu's current scholarly publishing initiative is conducted in partnership with Rowman & Littlefield Publishers, Inc. A 20% discount is offered to Beta Phi Mu members when series books are purchased through Rowman & Littlefield. For information about the Scholars Series and current and forthcoming titles, visit <http://www.betaphimu.org/scholars-series.html>.

### **Beta Phi Mu Monograph Series**

The Monograph Series was Beta Phi Mu's former scholarly publishing initiative, published in conjunction with Greenwood Press; it ran from 1989 to 2010. A complete list of Beta Phi Mu Monograph Series titles may be found at: <http://www.betaphimu.org/monographs.html>.

### **Beta Phi Mu Chapbooks**

From 1953 through 1989, Beta Phi Mu published a Chapbook series. Chapbooks, intended to be of interest to members, were examples of fine typography and fine binding. A current title was given to each new initiate during its publication run. A complete list of Chapbook series titles may be found at: <http://www.betaphimu.org/chapbooks.html>.

consists of administrative assistant, Romina Rodons.

### **Contact Information**

Beta Phi Mu Headquarters  
PO Box 292992  
Davie, FL 33329  
Email: [headquarters@betaphimu.org](mailto:headquarters@betaphimu.org)

### **Duties and Responsibilities**

Headquarters staff are responsible for the following duties:

1. Communicating with the Executive Board, members, chapters, LIS programs, and other organizations and parties
2. Working with the newsletter editor to publish the twice-annual *Pipeline* newsletter
3. Coordinating the Assembly meeting (Business Meeting and Member Reception) at each ALA Annual Conference
4. Coordinating two Executive Board meetings per year, held in conjunction with the ALA Midwinter Meeting and ALA Annual Conference
5. Coordinating interim online Executive Board meetings, as needed
6. Sending membership materials and certificates to new initiates
7. Fulfilling product orders for BPM branded merchandise
8. Maintaining the official database of all initiates
9. Maintaining email mailing lists for members and current chapter leadership
10. Contacting those accredited and recognized programs with no chapters, requesting names of eligible graduates for at-large membership
11. Coordinating the selection of the BPM scholarship winners
12. Coordinating elections of officers and board members
13. Maintaining official organization records and interfacing with BPM archives
14. Maintaining all financial records and submitting IRS tax forms
15. Other duties as required