

Housing and Facilities Conference: Post-Event Learning Resources

In this resource guide, you will find an overview of the learning themes from the Housing and Facilities Conference (HFC) and an opportunity to continue your learning following the event. For those of you who were unable to attend the HFC this June, we hope this resource gives you insight into the important challenges and opportunities in Gamma Phi Beta's future and helps you gain knowledge and skills to meet these needs moving forward.

You will find this document structured in the following way:

- Remarks from Our Opening session, One Gamma Phi Beta
 - This session, presented by Executive Director Megan Wick (Washington State) and International President Annabel Jones (Oklahoma) shaped the new, unified direction of the Sorority, Foundation and Facilities Management Company (FMC). It included a panel with Annabel Jones, Foundation Chair J.J. Kaelin (Colorado-Boulder) and FMC Chairwoman Leigh Ann Price (Texas Tech). The details of the panel could not be documented here, but we encourage you to reach out to your sisters and friends to ask about what they learned during this discussion.
- Selections from Educational Sessions
 - The bulk of this document is taken from our workbook materials for the HFC. While the workbook has not been produced in its entirety here, selections have been made that enhance your understanding of key concepts and skills related to recruitment and retention.
- Closing Remarks
 - Megan Wick, Leigh Ann Price and Annabel Jones provided remarks to our attendees prior to closing ritual which we have included here to summarize the experience overall.

If you have questions about any of the materials contained within, or would like additional information about the educational programs, please reach out to [AHC Manager Joel Saslaw](#).

One Gamma Phi Beta

Annabel Jones

Good evening and once again, welcome to RLI and the Housing and Facilities Conference! I hope you enjoyed dinner and are ready to dig into a weekend of leadership, learning and sisterhood.

The title of tonight's programming is 'One Gamma Phi Beta.' For some of you, this may be a familiar and welcome concept. For others, it may be a phrase you have heard, but aren't quite sure what it really means. And for many others, you may be hearing this term and thinking one of two things. 'What?' Or, 'Why are we stating the obvious, there is only ONE Gamma Phi Beta.'

I'd like to take some time to share more about why we are talking about One Gamma Phi Beta, what it means and what the future looks like under One Gamma Phi Beta.

So, why are we talking about this? Gamma Phi Beta is made up of three separate legal entities. The Sorority, the Facilities Management Company and the Foundation. In late 2018, we had the opportunity to evaluate and make some decisions about the management of all three.

In 2012 the FMC was formed as a LLC subsidiary of the Sorority. Since that time the Sorority, which is a 501(c)7 corporation, and FMC have shared one executive director who has important and distinct roles with International Council and the FMC Board of Managers. The FMC has employed staff and shared other staff services, like accounting and marketing, with the Sorority through an agreement that met legal and HR requirements.

For many years of the Foundation's recent history, the Foundation, a 501(c)3 corporation, has had a separate executive director and separate staff. With the departure of the Foundation's executive director last year, IC and the Foundation Board of Trustees evaluated the needs of the two entities and put into place a structure that closely follows what the FMC and Sorority have been enjoying since 2012 – one executive director, a few key Foundation staff and shared services between the Sorority and Foundation in key areas like accounting, legal affairs and marketing.

Legally, Gamma Phi Beta is comprised of a 501(c)7 corporation, an LLC and a 501(c)3 corporation. Legally, we are separate and have in place processes and procedures to ensure our legal and fiduciary needs are being met.

But most importantly, for the first time these three legal entities are truly united in purpose. The threads that tie us together have been reinforced and our bond as an organization working toward one common purpose is at its strongest.

What is our common purpose? Our members. Our purpose is our members and our drive is providing our members with a Gamma Phi Beta experience that makes them proud. That builds them up as confident women. That celebrates sisterhood. That inspires the highest type of womanhood.

In a few minutes, you will hear from Megan Wick, the executive director of the Sorority, FMC and Foundation. She will share more with you about the role of our workforce – all of you in this room – in supporting One Gamma Phi Beta.

She has a big job – working side-by-side with three boards AND leading our workforce. Her role is essential to keeping the bond of One Gamma Phi Beta strong. Megan is key to helping International Council, the FMC Board of Managers and the Foundation Board of Trustees stay diligently united in purpose. She will keep our campaigns, programs, initiatives and strategic plans focused and consistent. She will support our workforce teams in recognizing processes and efficiencies that support and enhance the work of all three entities in delivering an enriching experience for all Gamma Phi Beta members.

For those of you who came to this session thinking, ‘haven’t we always been one Gamma Phi Beta?’, I bet you are more tuned into what is happening at the local level, where our success means we must operate as one.

As you know, we have combined RLI and the Housing and Facilities Conference this year – a sign of One Gamma Phi Beta in action. 104 of our 139 collegiate chapters have some sort of facility. We all know that a chapter facility is integral to the success of these chapters. A successful chapter facility is a powerful recruitment tool, an important retention strategy and is at the heart of chapter life and sisterhood. But a chapter facility cannot be competitive if a chapter doesn’t fill every bed or meet recruitment and retention numbers. How do we help to support that? One way is through leadership grants, scholarships and financial support to our members.

We are truly interconnected and reliant on one another at every level, which is why financial support of the Foundation, by ALL our members, is so vital to our overall success. And we have to do a better job as an organization of instilling a culture of giving in our members on day one.

What would happen if at initiation every new member next academic year joined Carnation Nation, the Foundation’s collegiate giving society that recognizes gifts to the Foundation by our collegiate members of \$18.74? That would represent nearly \$122,000 to the Foundation. What does \$122,000 support? That could send 230 women to the REAL Leadership Conference.

Can you imagine the compounding effect of this if every member continued to just give \$18.74 a year to the Foundation for the rest of her life?

What would happen if every person in this room today joined me in donating \$25 to the Foundation? That \$7,500 could send 13 women to RLC. YOU could help support the leadership development of the next generation of confident women. I hope you will join me this weekend in making a donation of \$25 (or even more!) to the Foundation?

Every gift you give to Gamma Phi Beta – through your time, talent or treasure – supports our common purpose and strengthens the bond of One Gamma Phi Beta now and in the future.

Speaking of the future, five years from now, Gamma Phi Beta will be gathering to celebrate Convention 2024 in the year we celebrate Gamma Phi Beta's 150th anniversary. Five years is a long time that will go by in the blink of an eye!

There is so much on the horizon for Gamma Phi Beta. I know that many of our current initiatives will be points of pride in 2024. For example,

- A rebrand that will strengthen our brand image and reputation and invigorate and excite our members.
- The work of our Belonging and Inclusion Task Force. They are hard at work helping ensure Gamma Phi Beta remains relevant, inclusive and representative of every type of woman.
- Our leadership and educational programming that allows us to build confident women of character.
- Our chapter facilities as they continue to represent safe, inviting and competitive homes for our members to celebrate sisterhood.
- Girls on the Run. Each year, Gamma Phi Beta gets closer and closer to giving Girls on the Run \$1 million in funds raised by our collegiate chapters. In 2024, I predict we will be celebrating a few successive million-dollar years as we make a difference in the world around us with Girls on the Run alumnae and Gamma Phi Beta alumnae being one in the same.

The path to our 150th is certainly an exciting one with opportunity around every bend. But we do have some bumps and roadblocks we will have to navigate.

- From Harvard to the University of Nevada, Reno, our right to freedom of association is threatened, and will continue to be threatened. We must protect our rights.
- From coast to coast, the high school graduation rate will continue to decline. We must focus on recruiting to Total and retaining our members so that we can fill our chapter facilities and maintain thriving chapters.
- From the declining birth rate to the changing demographics of today's college students, we must be nimble and adaptive to attract the next generation.
- With more first-generation college students becoming potential new members, we must adapt our experience so that it is affordable and relevant to ALL potential new members.

All of you here today are Gamma Phi Beta leaders. Each and every one of us is responsible for thinking strategically and long-term about the future as the next five to 10 years will bring more change, more challenges AND more opportunities our way.

International Council has given a lot of thought to the future and we will continue to focus on it in the coming year as we develop the goals and objectives for the Sorority's strategic plan for the next five years.

One Gamma Phi Beta.

What will she look like when we celebrate our 150th anniversary?

- One Gamma Phi Beta that is financially stable across all entities.
- One Gamma Phi Beta that recruits to Total and RETAINS members – from Bid Day and throughout their lifetime.
- One Gamma Phi Beta that continues to provide safe, inviting facilities to members to call home.
- One Gamma Phi Beta that supports our members through leadership programming and financial aid.
- One Gamma Phi Beta that provides a membership experience that is relevant and important to every member, at all stages of her Gamma Phi Beta journey.
- And finally, One Gamma Phi Beta that continues to be united in purpose for the most important reason – to inspire the highest type of womanhood in ALL our members.

As you spend time learning and building sisterhood this weekend, I encourage you to think about your role in Gamma Phi Beta and your role in uniting us all in ONE purpose..... creating an engaging, enriching and lifelong member experience for every Gamma Phi Beta member.

I'd now like to turn it over to Executive Director Megan Wick, who will dive a little deeper on this very topic.

One Gamma Phi Beta

Megan Wick

Thank you, Annabel.

I appreciate Annabel's comments about understanding the role we all play in engaging and enriching a lifelong member experience. Whether that member is a collegian, alumna, volunteer or donor, each sister plays a role in impacting that experience.

We never stop being recruited and retained in Gamma Phi Beta.

In thinking about the focus of this week, I reflected on my own personal recruitment and retention journey. Why did I choose Gamma Phi Beta over that house with the key or the arrow? For one, every day I returned to Gamma Phi Beta, they seemed genuinely happy to see me – like it mattered that I was there. Also, on preference day, Kristi Brion genuinely cried when I left. I knew Gamma Phi Beta was my place. I belonged here.

Being a student athlete and a member wasn't easy and I am not sure I always put my best in to Gamma Phi Beta, but someone was always intentionally connecting with me, whether it was an older sister, advisor or pledge sister saying "you matter and we want you here."

Over my lifetime in Gamma Phi Beta, the women in this room repeated that same song - you matter, you are important to Gamma Phi Beta, we want you here, we need you here. But more importantly,

they were able to connect my unique gifts to the current needs of Gamma Phi Beta. That has certainly changed over time. Like many of you, I grew up here and am still growing up. I have more to give and my desire to continue giving is what connects and keeps me with Gamma Phi Beta.

I personally never stop being recruited and retained in Gamma Phi Beta.

Along with recruitment and retention, we are focused on the financial health of the Sorority, FMC and Foundation as well as consistent messaging across the organization at every level.

How are these priorities connected?

A few weeks ago, our FMC Facility Directors came to International Headquarters to receive training and education on their role in Gamma Phi Beta and the role they play in the recruitment and retention of our members.

The environment and culture of the chapter facility is critical to the recruitment of members but also the financial health of the FMC, Sorority and even the Foundation. When recruitment goes well and we consistently message the positive expectation of living in the facility, the facility is full.

When the facility is full, the FMC has capacity to put funds back into the facilities for improvements and updates. Competitive and safe housing is attractive to potential members (and current members) and keeps the expectation of living in the facility attractive and easy to enforce. When members have a positive experience within our chapters and our chapter facilities, they are more likely to not only encourage others to join our sisterhood but to also give back both time and treasure to the Foundation as well.

When the Foundation is financially strong, we have funding for scholarships and aid, supporting members who need help affording college and Sorority membership. A financially healthy Foundation also supports REAL Leadership programming and the CLC program which are instrumental to the development and retention of our members.

This is a partnership between all three entities and the workforce that supports them. Recruitment and retention strategy is not just a focus for the Sorority, but across all entities and all levels of volunteering.

This is why we need excited, engaged, volunteers to support our collegiate and alumnae chapters. Recruitment and retention of volunteers is so critical to our workforce and our member experience.

When a chapter is at total, the Sorority's financial health is stronger. No matter your volunteer or staff role, you play a role in the recruitment and retention of Gamma Phi Betas. With our current gap to total close to 900 members, we can each have an impact on our financial health and sisterhood, by embracing our role in connecting and engaging women in Gamma Phi Beta.

One definition of retention is to keep something in one's memory. The lifetime of the member experience is series of ongoing touchpoints, memory to memory, that connect a member back to Gamma Phi Beta.

This connection could be an annual girls' trip, joining a local alumnae chapter, a gift made to the Foundation, a volunteer role, celebrating a legacy born or attending a REAL Leadership event – to name a few. Each of us in this room is a connection point that keeps the memory of Gamma Phi Beta relevant for another member.

Having and sharing consistent messaging about what it means to be a Gamma Phi Beta allows us to come together and promote a strong brand we are all proud of. You will get a sneak peek of the new Gamma Phi Beta brand on Sunday morning. I hope this is a launching point for all of Gamma Phi Beta to start a new chapter as a united organization, inspiring and celebrating sisterhood.

If we are financially healthy, consistently focused on the recruitment and retention of each and every member, in each and every stage our lives, and can tell the story of “why Gamma Phi Beta” we can do amazing things as a sisterhood and premiere women's organization that provides an enduring connection to women who are strong alone – but stronger together.

Over the course of the weekend, you will learn about many ways to recruit volunteers, members, alumnae and board members. We want you to leave this weekend with a strong sense of purpose, understanding your unique role in the recruitment and retention at all levels of Gamma Phi Beta.

We are not who we are without you.

Gamma Phi Beta stands on the brink of such a bright and exciting future. We are the best at what we do in so many ways, within our sisterhood and within the industry. We are only able to move confidently into the future because of the history and effort of the people in this room. We collectively have always demonstrated a commitment to success and strength in times of challenges. That road has led us to the opportunity we have today, to invest in our sisterhood for the future.

Your Role in Recruitment and Retention

Program Description

As the member experience continues to evolve for collegians and alumnae, Gamma Phi Beta wants to provide the best experience possible. Together we will explore how to recruit and retain our members for a lifetime of involvement.

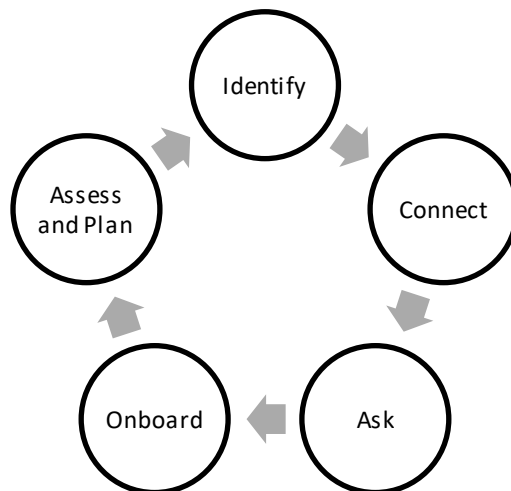
Learning Objectives

- Define recruitment.
- Define retention.
- Describe the recruitment and retention cycle in Gamma Phi Beta.
- Practice sharing your Gamma Phi Beta story.

Recruitment: Actively identifying, planning for and achieving the long-term, overall aims and interests that result in new members, volunteers and staff joining Gamma Phi Beta.

Retention: The result of a proactive effort by an organization to create and maintain a caring environment and beneficial experience where members want to stay involved, engaged and move the organization forward.

Recruitment and Retention Cycle



Taking it Home

- Share your volunteer story with three people when you return home.
- Post your volunteer story on your social media accounts.

College Students Today, Tomorrow and in 10 Years

Program Description

Today’s college students bring with them identities, experiences, backgrounds, values and aspirations that are very different from college students of the past; and future generations of college students will only continue to become more diverse. In this session, we will be thinking critically about how Gamma Phi Beta can evolve to meet the diverse needs of college students and remain relevant and sustainable for years to come.

Learning Objectives

- Describe characteristics of Generation Z, the current generation of college students and young alumnae.
- Discuss past, present and future trends in higher education.
- Apply concepts to evolve Gamma Phi Beta programs to better meet the diverse needs of college student.
- Analyze the impact of higher education trends and college student characteristics on recruitment and retention.

Who is Generation Z?

- Born between the mid-1990s and the mid-2010s.
- Most racially diverse generation to date.
- 30-40% of the population by 2020.

Defining Life Experiences of Generation Z

1. **Technology:** Gen Z are digital natives and have never known a world without technology, the internet and social media.
2. **Great Recession:** Their parents and families felt the effects of the Great Recession and the economic instability that came with it.
3. **Continuous War:** Gen Z has always lived in a country at war and have witnessed countless terror attacks and acts of gun violence.
4. **Social, cultural and political factors:** Given the social, cultural and political climate in recent years, this generation has seen its effects and engaged in advocacy work at a young age as a result.

Characteristics of Generation Z

Instructions: Put a star next to the characteristics that seem important for the future of Gamma Phi Beta.

Motivation	<ul style="list-style-type: none"> • Wants to make a difference in the world. • Doesn’t want to let others down. • Desires to advocate for causes they believe in. • Not motivated by public recognition.
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Relationships	<ul style="list-style-type: none"> • Open-minded and embraces diversity. • Prefers friends with shared values, hobbies and social interests. • Values family/parental input. • Looks up to parents, teachers, coaches, peers and fictional characters as role models.
Learning	<ul style="list-style-type: none"> • Prefers to construct the learning process rather than be instructed. • Eight-second attention span. • Seeks knowledge through technology.
Skills	<ul style="list-style-type: none"> • Wants skills to prepare them for a successful career. • Wants skills that will lead to social change. • Lacking the soft skills they need to be successful.
Cares and Concerns	<ul style="list-style-type: none"> • Not interested in “leadership.” • Interested in initiatives that foster sustainable long-term social change. • Interested in addressing root causes more than symptoms of social issues.
Communication	<ul style="list-style-type: none"> • Texting is the most prominent form of communication. • Email is viewed as more formal and takes too much time. • Prefers face-to-face communication, especially in the workplace. • Lacks strong interpersonal skills.
Financial Views	<ul style="list-style-type: none"> • Considers costs when selecting a college. • Concerned about college debt. • Insists on seeing a return on investment when they spend their money. • Prefers a “try before you buy” approach like a free seven-day trial.
Work Preferences	<ul style="list-style-type: none"> • Prefers entrepreneurial work. • Wants to work for organizations that align with their social compass. • Values stability, competitive salary and benefits and work/life balance. • Desires to work in a diverse work environment.

Taking it Home

- Read any of Dr. Corey Seemiller and Meghan Grace’s books on Generation Z: *Generation Z Goes to College*, *Generation Z Leads: A Guide for Developing the Leadership Capacity of Generation Z Students* or *Generation Z: A Century in the Making*.
- Listen to the podcast #GenZ, where the host interviews Gen Z experts as well as members of Generation Z.
- As you go about your volunteer work over the next year, consider how your work is helping prepare Gamma Phi Beta for the year 2035.

Mobilizing Your Team

Program Description

One of your best resources are the people with whom you work. During this program, you will learn new strategies for how to develop working relationships that can propel your work to the next level.

Learning Objectives

- Outline the influence framework.
- Evaluate priorities for key partners.
- Compare the five most common factors that impact motivation.
- Set goals for mobilizing your team.

Influence Framework

- Assume everyone can help you.
- Understand why you need your key partner.
- Identify priorities for the key partner.
- Understand motivating factors.

Be specific with your request

- How will you ask your key partner to help you reach your goal?
- At what stage of the project/goal will you need his/her help?
- Does s/he have specific expertise that can assist you?
- Can s/he be helpful in the development/brainstorming phase of your project/goal?
- Where do you need the most help?

Motivation Factors



Inspiration

CONNECT YOUR ASK to a DEEPER MEANING or CAUSE. These individuals are more willing to go out of their way to do something if they know it's the right thing or if it contributes to a valued cause.



Task

HELP THEM CHECK SOMETHING OFF THEIR TO-DO LIST. These folks may be motivated if you can offer something (time, resources, or mental capacity) to help them get their own work done.



Position

RECOGNITION, REPUTATION and VISIBILITY. Praise them publicly for their contributions, far and wide, and offer recognition like a recommendation (written or on LinkedIn).



Relationship

DEEPEN YOUR CONNECTION with THEM, or BETWEEN THEM and the TEAM. Spend time with them, listen to their cares and passions and help them strengthen relationships with others in your chapter.



Personal

UNDERSTAND THEIR UNIQUE QUIRKS and PASSIONS. You might appeal to this type of person by showing sincere gratitude or allowing them independence in decision making. It will depend on your understanding of this other person.

Taking it Home

- Schedule time to meet with your key partner and discuss your goal.
- Ask people on your team what motivating factors are most important to them.

Designing a Blueprint

Program Description

In our first session of the Housing and Facilities Conference, we will communicate the blueprint for our time together, which will include introducing topics that are at the forefront of our work and introducing staff, volunteers and vendors involved in the conference. This time together will set the direction for successive educational sessions, allowing for more breadth and depth throughout the weekend.

Learning Objectives

- Describe the purpose and blueprint for the conference.
- Identify key attendees and vendors and define their roles at the Housing and Facilities Conference.
- Identify housing trends related to recruitment and retention.

The presentation by Patrick Alderice, of Pennington & Company, can be found online as a separate resource at GammaPhiBeta.org > FMC > Housing and Facilities Conference.

Taking it Home

- Connect with the alumnae engagement volunteers attending RLI and brainstorm ideas for how to collaborate with a local alumnae chapter to foster greater engagement.
- Make a list of the vendors that might have services your facility needs. Prioritize time during the breaks to get information to bring back to your fellow AHC/LFAC board members.
- Make a commitment to spending more one-on-one or small group time with your collegiate members to understand the impact the facility or chapter space has made on their member experience so far.

Facilities Management: Nourish, Maintain and Restore our Sisterhood

Program Description

In our first joint session, we dug into the idea that we are all *recruiters*, regardless of our volunteer roles. Great facilities management is one strategy for successful recruitment and retention of members. In this session we will explore foundational areas of facilities management: nourishing our sisterhood through creating a sense of *home* for our members; maintaining occupancy through members' increased understanding of agreements; and restoring our facilities through sound financial management and planning for capital improvements.

Learning Objectives

- Describe the importance of creating a sense of belonging and home through your facilities.
- Evaluate agreements to increase members' understanding.
- Review financial management requirements.
- Explore opportunities for capital planning.

Good Guidelines: Financial Management			
	Ideal	Less than Ideal	Notes
Budget Yield	< 10%	> 10%	
Facilities Fees Evaluated for Competitiveness	Within One Year	More than One Year Ago	
Capital Reserve is Established for Major Improvements	Yes	No	
Vendor Agreements Renegotiated	Within One Year	More than One Year Ago	
Facilities/Affiliation Fees Collected Prior to Move In	Yes	No	
All Tax Forms Filed Annually (990, State Forms, etc.)	Yes	Not	
Reconciliations Done	Monthly	Every Two or More Months	
Financial Accounts/ Statements Reviewed	Semi-Annually	Annually	



Two Signatures in Place for Checks	Yes	No	
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Good Guidelines: Preventative Maintenance			
	Ideal	Less than Ideal	Notes
HVAC	Annually	More than bi-annually	
Kitchen Equipment	Annually	More than bi-annually	
Plumbing	Semi-annually	More than annually	
Exterior Paint	Annually	More than bi-annually	
Interior Paint	Annually	More than bi-annually	
Parking Lots/ Sidewalks	Semi-annually	More than annually	
Life Safety Devices	Quarterly	More than annually	
Electrical Systems	Annually	More than bi-annually	
Roofing	Semi-annually	More than annually	
Porches and Decks	Annually	More than bi-annually	
Sprinkler Systems	Semi-annually	More than annually	
Water Heater/Boiler	Annually	More than bi-annually	
Internet Infrastructure	Annually	More than bi-annually	
Flooring	Annually	More than bi-annually	
Laundry Equipment	Semi-annually	More than annually	

Good Guidelines: Capital Planning			
	Ideal	Less than Ideal	Notes
Plan in Place for Major Renovations/Improvements Needed in Next Five Years	Updated annually	No/Updated More than One Year Ago	
Capital Improvement Plan in Place: a) Mattress Replacements b) Common Area Furniture Replacement c) Landscaping Updates d) Roof Replacement e) Window Upgrades/ Replacements f) Laundry Equipment g) Flooring h) HVAC i) Commercial Kitchen Equipment	Yes	No	
Research Done for Costs Associated with Capital Improvements	Yes – with 10% added	No	

Taking it Home

- Host focus groups with members of different classes to understand what would make the facility or chapter space feel more like home. Alternatively, work with your collegiate officers to send a survey to the chapter on what makes members feel welcome and like they can be themselves, or how the facility could do better in this regard. Be open to this feedback and take it as an opportunity to learn and improve.
- Solicit the participation of five to seven members (not officers); have them read your agreements and tell you where they had questions and what those questions were. This will help you identify where you may need to revise the agreement or provide additional communication to members before they sign agreements.
- Find a financial advisor in your local area and talk through your plans and practices related to financial management, preventative maintenance and capital planning. Set two to three priorities for moving your current practices to best practices outlined in this session.

Food Service Providers: It's More Than Just a Meal

Program Description

Food has a lasting impact; it is an important factor in creating a warm and inviting place of gathering. Using an established company to provide and coordinate food services can significantly improve the experience of chapter members and volunteers working with facilities. Join Chef Jake Waldecker and Megan Weinstein from College Fresh to learn how food service providers can aid in both recruitment and retention of collegiate members as well as your board or committee members and volunteers.

Learning Objectives

- Describe three food service features that contribute to the recruitment and retention of members.
- Explore how food service vendors can contribute to a positive and rewarding member experience.
- List communication tools available for input, feedback and planning.
- Identify how food service vendors can support internal and external events.

Taking it Home

- Distribute a brief survey to chapter members to solicit feedback on your current food service provider. Use data to identify needs and guide conversations with current provider or chefs.
- Audit your current meal plans to identify if there are a variety of options for those members with dietary restrictions.
- Evaluate your current food service provider's communication techniques between members, volunteers, alumnae and board members. Establish professional standards to ensure efficient and effective communication.
- Each semester outline your chapter's special events or celebrations and discuss how your food service provider can handle all culinary coordination and execution.

For all inquiries, please contact College Fresh Vice President Jack Dawson at jack@collegefresh.net, 217.369.5743 or CollegeFresh.net.

Creating Effective Partnerships with Campus Officials

Program Description

Management of university-owned properties (e.g., residence hall suites, free-standing buildings and rooms) has unique challenges and opportunities for our boards and committees. This session, facilitated by Carolyn Whittier from Valparaiso University, will outline best practices for navigating campus environments, building effective partnerships and designing spaces that engage members now and in the future.

Learning Objectives

- Understand the role, purpose and function of each invested entity working with Gamma Phi Beta chapter facilities.
- Build relationships with college/university partners working with housing facilities.
- Develop key questions to ask in different scenarios.
- Establish a key contacts/resource listing for the affiliated house corporation (AHC) board or local facilities advisory committee (LFAC).

Consider the following case studies and use the questions to process how you would respond.

Case Study One: Renovation

The AHC/LFAC has determined it is time to renovate the primary chapter room of the chapter facility. Volunteers establish a timeline and work with the proper entities to have everything approved. The renovation begins in May and is on schedule to be completed in mid-July. Some delays occur in acquiring the materials for the renovation and construction is pushed back. Recruitment school begins on August 5 and the renovations are not completed.

- What is the role of the AHC/LFAC in this situation?
- What are the key questions that need to be asked and at what time intervals?
- Who are key resources – both within Gamma Phi Beta and at the university – that could assist in this situation?

Case Study Two: Occupancy

The chapter is preparing for room selection and the executive council officers are concerned they will not be able to fill all the beds in the facility. The women of the chapter are complaining about the rules in the house being too restrictive and they would rather live in an on-campus residence hall than live in the house. Following room selection, the chapter has five vacant beds for next year.

- What is the role of the AHC/LFAC in this situation?
- How could the AHC/LFAC have been engaged in the conversation with the collegiate chapter sooner?
- What resources are available to the AHC/LFAC or the collegiate chapter in this scenario?

Case Study Three: Member Conduct in the Facility (Alcohol)

The facility director is concerned that one of the women living in the chapter facility is drinking alcohol in her room. The chapter has approached the member in several informal capacities to try to help her understand that this is not allowed. On Saturday evening, several members came forward to share that they saw the member drinking in the member's room. The facility director knocks on the door to find that the member is drinking in the facility.

- What is the role of the AHC/LFAC in this situation?
- What policies or rules have been violated by this member?
- What additional resources could the AHC/LFAC engage related to this situation?

Case Study Four: Member Conduct in the Facility (Mental Health)

The chapter president is aware of a member who is having personal issues and has been seeking counseling from the college/university counseling center. One evening, a member of the chapter comes to the president with alarming information that her roommate has taken two bottles of pills and is non-responsive. The chapter president immediately calls 911 and the woman is transported to the hospital.

- What is the role of the AHC/LFAC in this situation?
- What other Gamma Phi Beta or university resources are available to the collegiate chapter or the AHC/LFAC?
- What would be the next steps you would recommend in this situation?

Case Study Five: Facility Issues

Several residents of the chapter facility are reporting an odd smell coming from one side of the house. Upon inspection there does not appear to be any immediate issue, but the smell persists. Three women begin to complain of their allergies acting up and they think it is due to the "smell" of mold in their rooms.

- What is the role of the AHC/LFAC in this situation?
- What are the primary and secondary concerns in this facility issue?
- What would communication regarding the facility issue look like in this scenario?

Taking It Home

- Who are the key resources available to you as a housing volunteer?
- What questions could you ask this weekend to inform your work as a volunteer with the Gamma Phi Beta collegiate chapter?
- What are action steps you can take in the next three months to establish a strong working relationship with the college/university?

What's Liability Got to Do with Risk Management?

Program Description

Join Allison Mrasek from MJ Insurance as she shares information about hot topics in liability and risk management related to sorority housing. Based on feedback from our housing and facilities board members, this session will specifically address issues around heat sensors, general liability insurance for facilities and liability and risk concerns for facilities volunteers (i.e., directors' and officers' coverage).

Learning Objectives

- Understand insurance coverage as facilities volunteers.
- Identify options for installing heat sensors in free-standing facilities.
- Understand your insurance coverage and know when to contact MJ Sorority.
- Understand current trends in liability and risk management related to sorority housing.

The presentation by Alison Mrasek from MJ Insurance can be found online as a separate resource at GammaPhiBeta.org > FMC > Housing and Facilities Conference.

Taking it Home

- Find key resources on MJSorority.com.
 - Employment Safety Basics Webinar
 - Compulsory Controls
 - Chapter House Self Inspection Form
 - Property Maintenance Checklist
 - Inventory Checklist
- Know you are covered as a volunteer and as a property manager.
 - Download your Insurance Summary at MJSorority.com > Services > Insurance Summary.
 - Request a copy of your Insurance Overview if not already on file at MJSorority.com > Services > Insurance Overview.
- Develop a plan to install or report installation of heat sensors in your facility.
 - Reach out to your local security or fire protection company; or
 - Contact Tattletale for more information about their Rate of Rise heat sensor at Shop.Tattletale.com > Collections > Rate of Rise.
- Fill out the Non-Event Specific Certificate of Insurance form online for proof of coverage at MJSorority.com > Services > Non-Event Specific Certificate of Insurance Form.

Contact Information

Contact Heather Cox at heather.cox@mjsorority.com to submit a claim.

Contact Allison Mrasek at allison.mrasek@mjsorority.com for all other requests.

Emergency Preparedness and Incident Reporting

Program Description

Preparing for emergencies ahead of time helps you keep a cool head in the moment. During this session we will explore best practices in emergency preparedness, tactics for how to triage an emergency and proper protocol for communication and reporting following an incident.

Learning Objectives

- Explore best practices in emergency preparedness.
- Identify triage tactics for responding to emergencies.
- Describe how to use the Gamma Phi Beta Incident Report.

An emergency is defined as: a sudden, urgent, usually unexpected occurrence requiring immediate action.

What emergency preparedness protocols can you institute at your facility?

The following is a starting point for your facilities. Write additional items or tasks that you can add to your standard protocols and procedures.

Fire Safety

1. Fire alarms and/or sprinkler system are tested every six months.
2. All hallways, storage areas and walkways are regularly cleared of hazardous or flammable materials.
3. Electrical wiring is checked annually.

Natural Disasters (floods, tornadoes, hurricanes)

1. Tornado protocols are posted in the facility and drills are practiced every six months.
2. Electrical components are raised 12" above projected (or normal) flood levels in the facility.

Safety and Security of the Facility

1. Security systems, locks, key codes, etc. are tested and reset every four months.
2. A protocol is in place for what happens when keys/fobs are lost (i.e. reporting, deactivation of fobs, etc.).
3. A perimeter audit for doors and windows propped open is conducted.

More information can be found online via [Ready.gov/Be-Informed](https://www.ready.gov/Be-Informed).

Triage Tactics

1. Assess for physical threat: threat to self, threat to others.
2. Call proper authorities (e.g., 911, campus safety, campus health services, etc.).
3. Relocate the individual to a private location (if possible and safe to do so).
4. Assign individuals to key tasks:
 - a. Communicate with chapter president and chapter advisor.
 - b. Lookout and liaison for authorities/support personnel.
 - c. Support buddy for the person affected.
 - d. Crowd management.

Taking it Home

- Use the summer months to take an audit of your emergency preparedness protocols, evaluating which you need to add, update or provide training on in the fall. MJ Insurance (MJSorority.com > Resources > Library) has a number of resources to support your audit and planning, including a Chapter Facility Self-Inspection Form. The Department of Homeland Security also has an extensive collection of resources for all sorts of emergencies, available at Ready.gov > Be Informed.
- Work with the chapter advisor and other ex-officio officers to come to a shared understanding of your triage tactics. Identify who should serve in each role, and document this in several places throughout the chapter facility.
- Familiarize your AHC or LFAC with the campus' active shooter protocols. Consider partnering with your collegiate officers to host a PACE program on campus emergencies and safety, utilizing campus officials as guest speakers.
- Explore the Chapter Incident Report online with your LFAC or AHC members. Reinforce the protocol for when and how to submit this form with your board/committee at least once a quarter.

Managing Excellence: Performance Management and Case Study

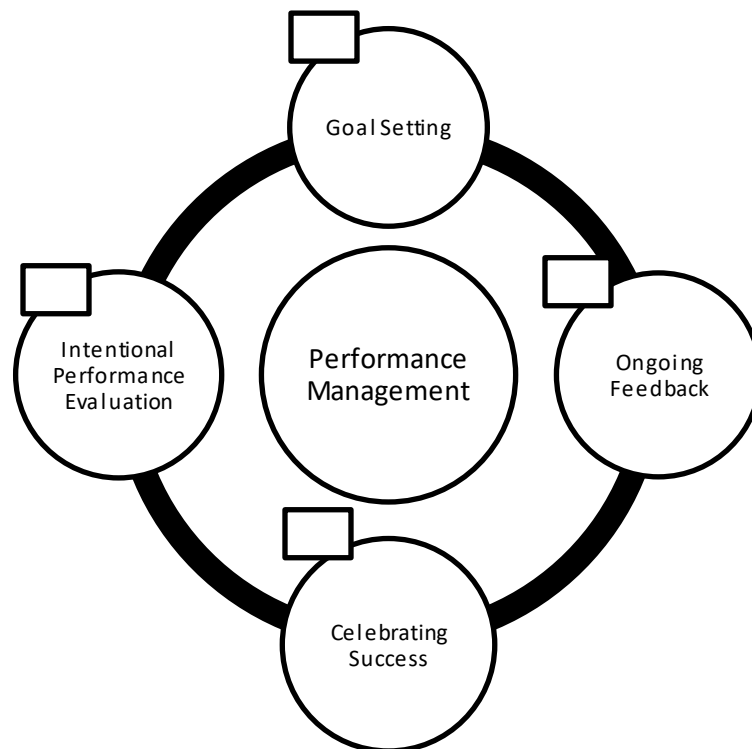
Program Description

Great management of your facility requires the right talent in the right facility director role. Employees are most effective when they have clear expectations, goals and regular feedback from their supervisors. Clear performance management will take your facility director's work to the next level.

Learning Objectives

- Distinguish key components of a performance management process.
- Identify how performance management can improve facility outcomes, reduce risk and lead to higher employee engagement.
- Practice identifying performance challenges and successes in a sample case.
- Practice implementing performance management conversations.

Components of Performance Management



Based on initial definitions, write an x in the performance management activities that you currently conduct, in any manner, with your facility director.

Setting Goals

Goal setting is a process of establishing objectives to be achieved over a time period, often annually. It is the performance criteria an employee will be evaluated against. Performance goals for individual employees should ideally align with organizational goals and should be SMART:

- **S**pecific, clear and understandable.
- **M**easurable, verifiable and results oriented.
- **A**ttainable, yet sufficiently challenging.
- **R**elevant to the mission of the department or organization.
- **T**ime-bound with a schedule and specific milestones.

Finally, effective goals should be participative. Both manager and individual should be involved in the development of goals to ensure understanding and commitment. Goals should be documented, available for review, managed on a continuous basis and acknowledged. Goals should be flexible enough to account for changing conditions.

Examples of effective goals include statements such as these:

- Increase revenue by 10 percent during the first quarter.
- Reduce office expenses by 25 percent as compared with the prior year's actual costs.
- Decrease employee absences from three days to one day per quarter.

Ongoing Feedback

The only performance that can be managed is present or future performance. You cannot go back in time. Thus, ongoing feedback is the vehicle by which to communicate information that informs current and future performance. Ongoing feedback provides, impromptu or scheduled, two-way communication around goals, problems, solutions and projects. Ongoing feedback can take many forms but is any regularly communicated information. Examples include:

- Shared project management systems to update the status of ongoing work (Google Docs, spreadsheets, project management software, etc.)
- (Bi-)weekly one on one conversations between employees and supervisors
- Regularly scheduled phone calls, text message or email check-ins

Celebrating Success

Performance management is as much about encouraging the good as it is about redirecting the bad. Employee recognition can take many forms but has been proven to improve business quality and safety, lowers stress, reduces turnover costs and encourages employees to continue learning and training. Any performance management process should include intentional ways for supervisors to celebrate their employees' success.

Intentional Performance Evaluation

Once goals have been set, intentional performance evaluation can be performed in a variety of manners. Regardless of the type or format, any performance management process should include reflection on stated goals, a review an employee's behavioral and work expectations, clear definitions of each level of performance. Supervisors and employees should be provided with examples of behaviors, skills, and measurements. Several types of performance review systems are in common use. Each system has its benefits and drawbacks.

- **360-degree feedback:** This process collects information from the employee's supervisor, stakeholders and subordinates about an individual's work-related behavior and its impact. Other names for this approach include multisource feedback or group review. This form of appraisal is widely favored for employee development purposes, but requires expertise and training to conduct in a successful and equitable manner
- **Competency-based:** This type of system focuses on performance as measured against specified competencies (as opposed to specific tasks or behaviors) that are identified for each position.
- **Management by objectives.** Management by objectives (MBO) is a process through which goals are set collaboratively for the organization, various departments and each individual member. Employees are evaluated annually based on how well they have achieved the results specified by the goals. MBO is particularly applicable to nonroutine jobs.

Templates for a variety of performance management processes can be found in a variety of places:

- The Society for Human Resources Management - www.shrm.org
- The Management Center - <http://www.managementcenter.org/tools/developing-people/>
- Littler Edge provided Gamma Phi Beta with a range of performance management templates. Email hr@gammaphibeta.org for access.

Case Study: Omega Omega

Read the following case study on a fake Gamma Phi Beta chapter and underline any points that stand out to you. Additionally, review this chapter's facility director job description. You will use this case study as the basis for the remainder of the activities. Please review the Omega Omega facility director job description (Appendix 1) and budget (Appendix 2) as additional background to complete the activity.

Omega Omega Chapter is at a large-sized midwestern state school with a thriving fraternity and sorority system. The facility director started in the role one year ago. The house has a third-party property management company that helps with maintaining the property. The house sleeps 65 women and the chapter has a total membership of 275. In the past there has been some concern about heating and cooling the older part of the house. Overuse of air conditioning system by residents has caused expensive plumbing issues in the past. Overall, the residents like the food but there have been some challenges managing and communicating with the food provider the range of dietary restrictions. Residents like the Facility Director and have asked her to help with bid day and the new member meeting in the Fall.

Step 1: Setting Goals

Here are two examples of clear, outcome-oriented SMART goals you could set for the Omega Omega facility director.

- Example 1: Complete all expense reporting and ensure that supplies expenses are within $\pm 10\%$ of budgeted allocations each month.
- Example 2: Maintain weekly communication (text, in-person or phone call) with the collegiate facility manager regarding maintenance projects, chapter events and food.

Now, you try. As a group write two more SMART goals for the facility director. Your goals could be around emergency management, food service, vendor management, relationship-building, safety and security, etc.

Step 2: Creating a Plan for Ongoing Feedback

What ongoing feedback styles have worked for you in the past?

As a group, put an O next to the topics you would want to discuss on an ongoing (weekly) basis and an A next to the topics you would want to ensure are discussed as part of the annual review process. Write both "A" and "O" if you want feedback to be provided on both an ongoing and annual basis

- | | |
|--|--|
| <input type="checkbox"/> Budget Management | <input type="checkbox"/> Communication styles |
| <input type="checkbox"/> Vendor Management | <input type="checkbox"/> Emergency and security planning |
| <input type="checkbox"/> Food service | <input type="checkbox"/> Chapter operations and events |
| <input type="checkbox"/> Relationship-management | <input type="checkbox"/> Maintenance issues |
| <input type="checkbox"/> Food service | <input type="checkbox"/> Capital improvement projects |

Step 3: Celebrating Success

What are some achievements you would want to celebrate with the Omega Omega facility director?

Share: What are ways you've celebrated or recognized facility director successes at your facility?

Step 4: Intentional Performance Evaluation – Sample Evaluation Conversation

What did you notice that you would you do differently? What was not covered?

What went well during the performance management conversation?

Taking it Home

- Talk to your facility director to identify a performance management process that supports the facility's objectives and the facility director.
- Create a timeline for when ongoing feedback and performance evaluation(s) will be provided.
- Write SMART goals and outline a performance management process to implement.

Closing Remarks

Megan Wick

On Thursday night, I said we never stop being recruited and retained in Gamma Phi Beta. I saw so many instances of this over the past few days but nothing more acute than seeing Linda Johnson (Vanderbilt) in a risk management workshop surrounded by newer sisters and volunteers, taking notes and learning. If Linda Johnson can still learn something about risk reduction after serving as the International President and the chair of the Foundation, then all of us do. She currently serves as the collegiate chapter supervisor for Eta Xi chapter and has provided incredible leadership. This is a perfect example of how Gamma Phi Beta has connected Linda's unique talents to the current needs of Gamma Phi Beta.

I don't think I realized that the topic of recruitment and retention would lead to so many feelings of sisterhood and reflection this week. I have felt so much love and appreciation for volunteering and giving back to this organization that we all love. Connectedness, belonging, diversity, inclusion and appreciation are all critical to the recruitment and retention of our collegiate and alumnae members, donors, volunteers and board members. I hope through the programming provided this weekend you not only understand your value to this sisterhood but the value of those around you and your role in their feeling of connectedness. When you understand how to connect, appreciate and include, you can make a true impact on the recruitment and retention of others in Gamma Phi Beta.

Thank you for an amazing week of sisterhood that I hope retains you in Gamma Phi Beta until we can meet again.

Closing Remarks

Leigh Ann Price

As we conclude the inaugural joint REAL Leadership Institute and Housing and Facilities Conference, I am grateful for the vision of our professional staff for bringing together volunteers from across the whole Gamma Phi Beta spectrum. We all need each other to succeed, and it is important to learn and train and work together. It is good to review our status and set aspirational goals knowing others share these goals.

It has been wonderful to see old friends and meet new ones. The bonds of Gamma Phi Beta are strong, lasting and constantly renewing. As we head back home, let us harness the energy generated in Colorado to lead Gamma Phi Beta to 150 and beyond.

Mentor's Report

Annabel Jones

Dear Sisters,

As I leave Denver, I am excited. I am excited about:

- One Gamma Phi Beta: the opportunities for the Sorority, the Foundation and the FMC are endless, and I can't wait to see how they progress.
- Our rebrand: I love the colors, the crescent moon, the historic letters, and all of the new logos.
- The new retention and recruitment skills I learned: they are applicable to both our collegiate members, our alumnae and our volunteers.
- The Belonging and Inclusion Task Force and its work: they are meeting an important need as we look to the future.
- The Clara Project and our efforts to develop Gamma Phi Beta leaders at the highest level.
- Our upcoming 150th anniversary: I can't wait to see how we celebrate it.

I also leave Denver thankful and proud. I am thankful and proud of:

- The work of our AHCs and LFACs: they help to make our chapter facilities competitive, safe and a home for our members.
- Our volunteers: they give their time and talents to Gamma Phi Beta on a daily basis, and they make a positive difference in our organization every day.
- Our International Headquarters (IH) workforce: these women and men are so committed to making Gamma Phi Beta excellent in all that we do.
- The monies our members have raised for Girls on the Run. The Gamma Phi Beta and Girls on the Run partnership is Building Strong Girls every day.
- The quality of our programming: our events, RLI, RLE, RLCs and Convention, as well as our regular chapter programming are cutting edge. They add so much to our member experience.

And, I leave Denver full of love. As a collegian I valued the friendships I made as a Gamma Phi Beta. I still value them. I never realized, though, that some of my closest friends in the world would be Gamma Phi Betas I met through volunteering for Gamma Phi. In all honesty, on those bad days when I sometimes think about quitting my volunteer position, I always change my mind because of you. The relationships I have developed with you nurture and sustain me. They make me a better woman. Yes, they inspire me to be the highest type of woman.

I hope that each of you uses the knowledge you learned at RLI when you return home. Use these skills to improve your chapters, AHCs and LFACs, your community, and your personal relationships.

Use these skills to build confident women of character who celebrate sisterhood and make a difference in the world around them.



All of you are leaders. Lead with Love. Lead with Labor. Lead with Learning. Lead with Loyalty. And above all, be a true and constant friend.

Save travels, dear sisters. I hope to see all of you in Palm Springs next June.

The Mentor