



REAL Leadership Institute: Post-Event Learning Resources

In this resource guide, you will find an overview of the learning themes from REAL Leadership Institute (RLI) and an opportunity continue your learning following the event. For those of you who were unable to attend RLI this June, we hope that 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 RLI. 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 [Director of Education Jill Duffy](#).



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 an 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.

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.

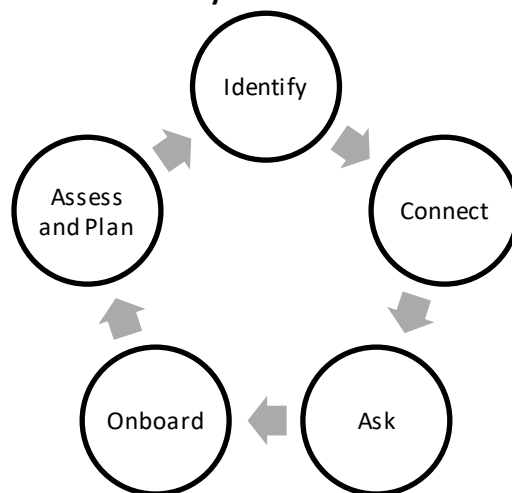
Learning Objectives

- 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.
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.



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?

Motivating 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.

Selecting the Best

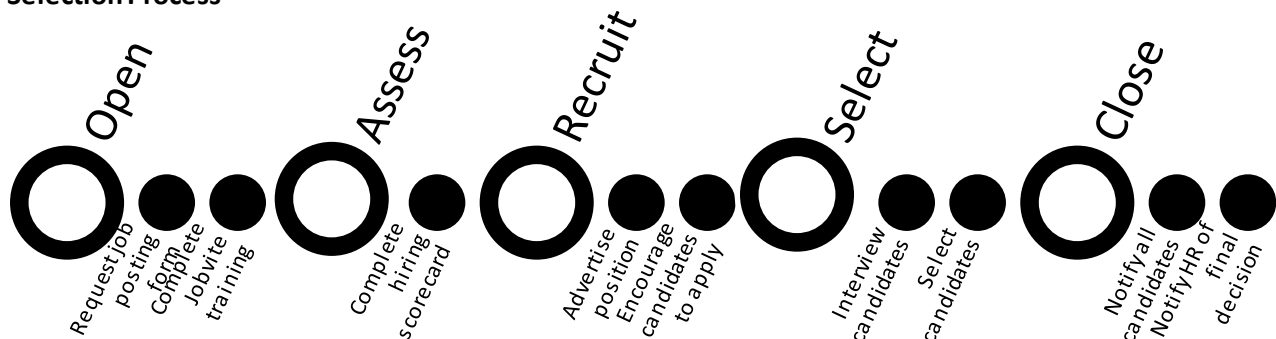
Program Description

Finding the right person for a volunteer role helps ensure that the best people are supporting Gamma Phi Beta. This session will explore the best ways to interview, select and place volunteers.

Learning Objectives

- Describe the volunteer selection process.
- Develop an interview scorecard.
- Analyze responses to interview questions.
- Explore bias in the selection process.

Selection Process



Types of Bias

Confirmation Bias: This type of bias occurs when you have created a hypothesis and look for statements or actions to confirm it.

Stereotype Bias: This kind of bias assumes that traits of somebody will make them better or worse for a position.

Implicit Bias: This type of bias is one that we are unaware of and is outside of our control. These preferences and defaults help us make quick judgements of situations and allow us to impulsively react in situations.

Taking It Home

- Review interview resources on GammaPhiBeta.org>Volunteers>Human Resources.
- Complete a hiring score card for all positions for which you are hiring.
- Select behavioral questions that align with member competencies for open positions.



Building a Sense of Belonging in Gamma Phi Beta

Program Description

Join us in this PACE-style session to learn about Gamma Phi Beta's sisterhood research through activities that help members build a sense of belonging. During this interactive session you will build meaningful relationships with your sisters using practices you can apply to any volunteer role.

Learning Objectives

- Review Gamma Phi Beta's five schema of sisterhood.
- Define sense of belonging.
- Explain three ways to promote belonging.
- Practice three ways to promote belonging.

Belonging through Relationships

One way to build belonging is by building interpersonal relationships. An effective way to do this is through small group activities or interactions.

How can you infuse this information into your life inside or outside of Gamma Phi Beta?

Belonging Through Care and Concern

Chapters that reported high levels of belonging also reported a high level of care and concern for the people within their group or chapter. To truly demonstrate care and concern, you need to invest in the people around you by getting to know them on a deeper level.

How will you get to know the people in your life either inside or outside of Gamma Phi Beta so you can show care and concern when they truly need it?

Belonging by Breadth of Relationships

Chapters that reported a higher sense of belonging also reported higher levels of interconnectedness among members. The more people someone knows in a group, the more likely they are to feel like they belong. While there is certainly value in having deep relationships, research seems to suggest belonging is fostered more by breadth of relationships than depth of relationships.

How can you use this information to create belonging in your own communities?

Taking it Home

- Teach others how they can foster belonging by sharing these practices with them.
- Learn more about Gamma Phi Beta's sisterhood research at GammaPhiBeta.org.> Collegians > Education > Sisterhood Chairwoman.
- Start implementing these practices this weekend and apply them in your personal life to show off Gamma Phi Beta's sisterhood through your actions.



Smart COB: Taking an Intentional Approach to Continuous Open Bidding

Program Description

Sometimes chapters spin their wheels trying to recruit new members during the continuous open bidding (COB) period. In this session, learn how you and the chapter you work with can work smarter at COB to make progress toward Total. You will practice tangible strategies you, as the recruitment advisor, can implement before, during and beyond COB to maximize this opportunity for your chapters, whether you need to recruit five or 50. Since every chapter needs to be ready to COB due to the ever-changing landscape of recruitment, this workshop is for you!

Learning Objectives

- Distinguish between a COB event and a COB program.
- Describe how you can use three types of COB events to strategically build a COB program.
- List the steps for building a COB program.
- Apply the steps for building a COB program.

COB Event vs. COB Program

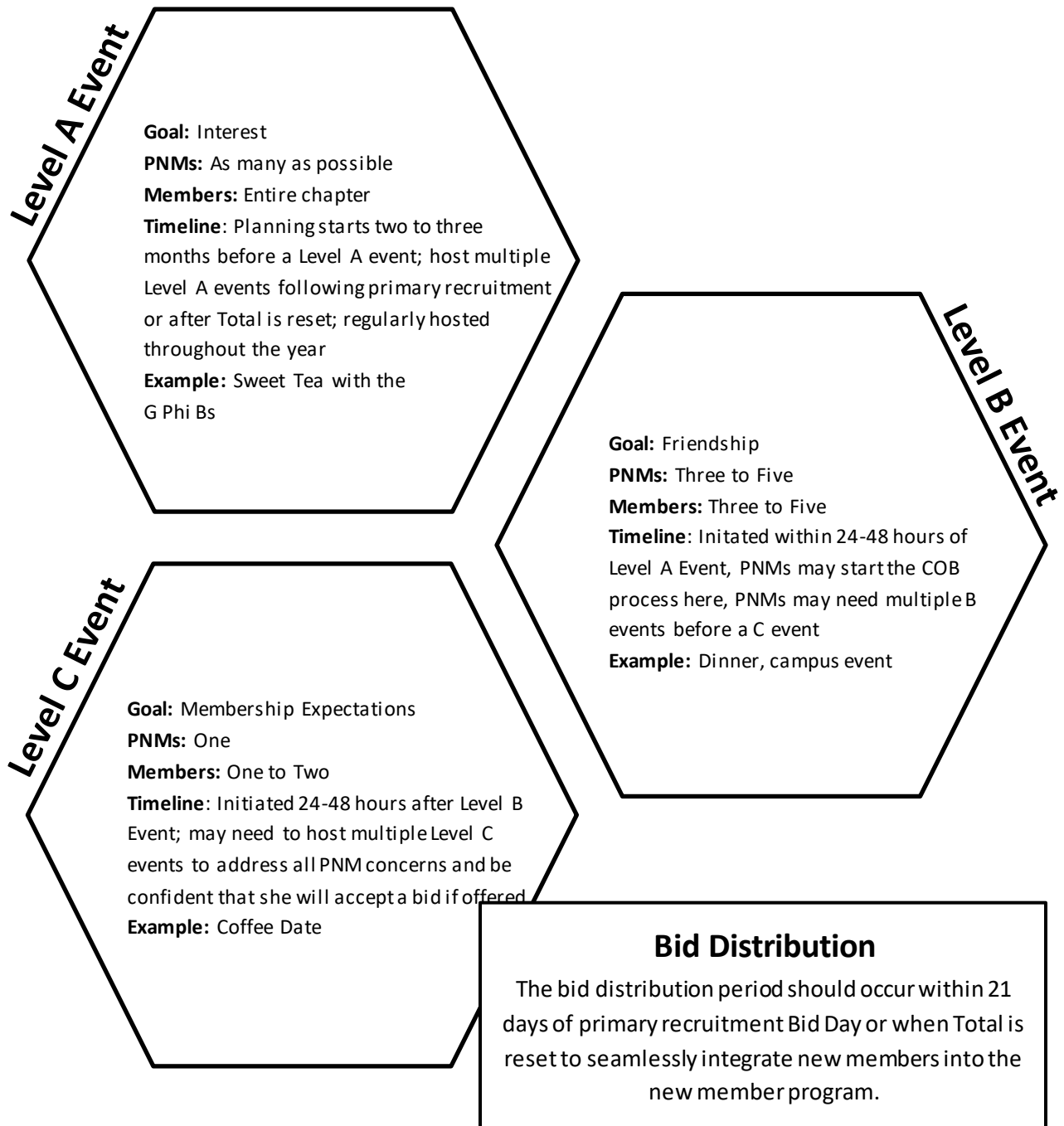
Read each summary and highlight the things that stand out to you and make note of the differences between the two.

COB Event: A time-limited recruitment activity after primary recruitment or when Total is reset where members and potential new members (PNMs) meet and converse with the goal of increasing interest in joining Gamma Phi Beta. While relationships with attendees can start at a COB event, it is unlikely they will move beyond surface level into deeper friendships and, ultimately, sisterhood because of a single event. The MVP or recruitment committee serve as event planners and often focus on details (e.g., invite list, activities, outfits, themes, food, drinks, etc.), while the recruitment advisor ensures the details of the event will reach the intended outcomes. Events should be a component of a larger COB program, but not the entire strategy.

COB Program: A year-round strategy for bringing in PNMs outside of formal recruitment. A COB program is comprehensive and includes PR and marketing efforts, name gathering, relationship-building, selecting members and offering bids. COB program plans are ongoing and developed before there is a vacancy in Quota or Total. The focus is on the bigger picture of maintaining Total with the goal of improving Gamma Phi Beta's image, organically forming deeper friendships with unaffiliated women and building their interest in joining Gamma Phi Beta. The MVP is responsible for overseeing, leading and implementing all aspects of the program with the help from her committee, while the recruitment advisor ensures that realistic goals are set and a long-term, strategic plan is in place to get to Total.



Types of COB Events





Taking it Home

- Teach your MVP about the three types of COB events so she can use them as she is thinking about and planning for COB.
- Complete the mind jogger activity with your chapter, create a method for recording and managing information about PNMs and teach your MVP about quality responses to PNM concerns. Check out the free recruitment resources from Phired Up at <http://phiredup.publishpath.com/free-recruitment-resources>.
- Browse Phired Up's blog for more COB tips and tricks at blog.phiredup.com.
- Utilize Gamma Phi Beta's How to Guide for COB found at GammaPhiBeta.org > Member > Collegians > Membership.



10 Behaviors to Increase Engagement

Program Description

How can you keep people engaged? This session will help answer this question by exploring 10 leadership behaviors that have proven to increase engagement. By analyzing these behaviors participants will be able to apply them to leading others in any volunteer role.

Learning Objectives

- Describe 10 behaviors to increase engagement.
- Analyze research on engagement.
- Identify how engagement research impacts your volunteer role.
- List ways to practice engagement behaviors.

How have you been engaged in the past?

What does successful engagement look like to you?

10 Behaviors to Increase Engagement from *The Leadership Challenge*

1. Follow through on promises and commitments you make.
2. Build consensus around a common set of values for running our organization.
3. Describe a compelling image of what our future could look like.
4. Speak with genuine conviction about the higher meaning and purpose of our work.
5. Challenge people to try out new and innovative ways to do their work.
6. Identify measurable milestones that keep projects moving forward.
7. Treat others with dignity and respect.
8. Involve people in the decisions that directly impact their performance.
9. Make it a point to let people know about your confidence their abilities.
10. Get personally involved in recognizing people and celebrating accomplishments.

Taking it Home

- Set a goal of how you want to practice these behaviors daily.
- Lead a conversation about the vision for your teams.

Creating Your Volunteer Pipeline

Program Description

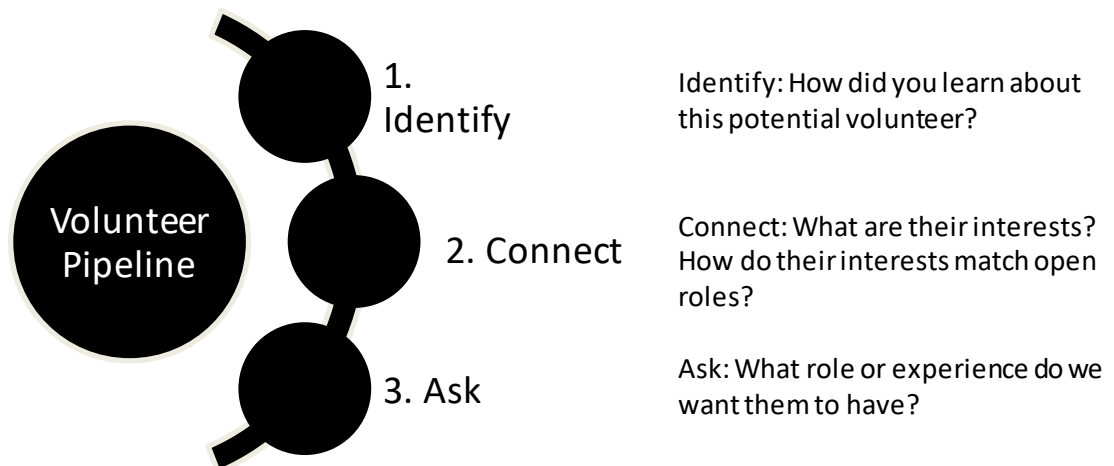
Having a plan to fill volunteer vacancies begins with creating a pipeline of future volunteers. Knowing you are one of Gamma Phi Beta's best volunteer recruitment resources, you will explore how to develop a strategy for creating a pipeline and techniques for tapping into your networks.

Learning Objectives

- Define a volunteer pipeline.
- Describe how to use a volunteer pipeline.
- Explore strategies for creating a volunteer pipeline.
- List five names of potential volunteers.
- Explore tactics for using your network.

Volunteer Pipeline Strategy

A volunteer pipeline is a process where potential volunteers are educated and matched with an open volunteer role.



Taking It Home

- Create an electronic version of your volunteer pipeline.
- Set a bi-weekly reoccurring calendar appointment to update your volunteer pipeline.

Retention Practices that Make Membership Stick

Program Description

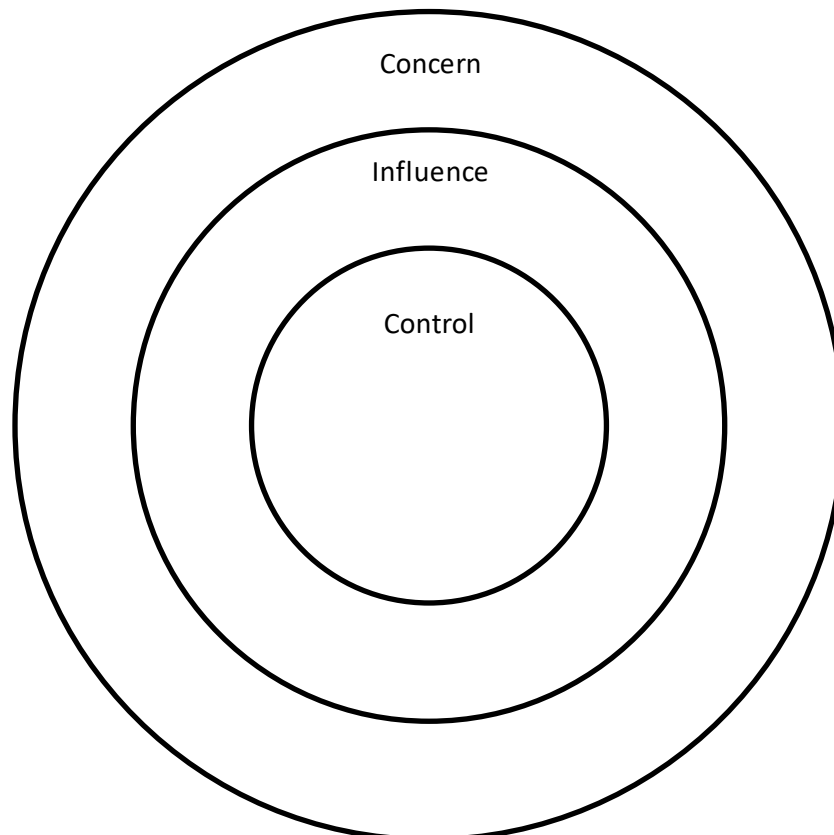
Getting members to stick around is no easy feat. Join us in this session to identify the root cause of poor retention and discuss ways you can apply active retention practices to keep members coming back. Whether you need help retaining collegiate members or volunteers, this program is for you!

Learning Objectives

- Define retention.
- List common reasons people disengage or withdraw from Gamma Phi Beta.
- Determine the root cause of one reason people disengage or withdraw from Gamma Phi Beta.
- Apply one strategy to improve retention based on the identified root cause.

Circles of Concern, Influence and Control

Consider the reasons why members resign and ask yourself, is this something the chapter or I have influence over? If yes, place that reason in your circle of influence. Once you have placed reasons in your circle of influence, ask yourself is this something the chapter or I have direct control over? If yes, place that reason in your circle of control.





Retention Practices

Which retention practice(s) will help address the root cause of retention challenges? Put a check mark next to each practice that will help you address your identified root cause.

- Clear, consistent membership expectations
- Time-limited, specific opportunities
- Early intervention
- Multiple points of connection

Why will these retention practices be effective for addressing the root cause?

How can you implement one or more retention practice when you leave RLI?

Taking it Home

- Share your process for identifying your root cause of retention challenges with your team to create buy-in to boost retention.
- Learn more about Circles of Concern and Circles of Influence in Stephen Covey's book, *Habits of Highly Effective People*.
- Brush up on your problem-solving skills by learning more about the Five Whys method from Mindtools.com.



A Game of Strategy: Bringing Recruitment to the Next Level

Program Description

Recruitment is all about outfits, songs and bumping, right? Not quite! Join us in this session to learn how you can use data to inform a strategic recruitment. This type of big picture thinking will take your chapter's recruitment to the next level.

Learning Objectives

- Distinguish between tactical recruitment and strategic recruitment.
- Compare membership vice president's (MVP) role and recruitment advisor's role in recruitment.
- Identify a recruitment challenge using data.
- Set tangible recruitment goals using data.
- Develop a plan to address recruitment goals using data.
- Communicate with the chapter using data to gain buy-in.
- List other sources of data to evaluate goals.

Tactical Versus Strategic Recruitment

Review the definitions below and reflect on where you think you fall on the continuum.

Tactical Recruitment

Focusing on actions, ends or means that are immediate or short-term in duration that result in new members joining Gamma Phi Beta.

Strategic Recruitment

Identifying, planning for and achieving the long-term, overall aims and interests that result in new members joining Gamma Phi Beta.



Based on these definitions, place an "RA" along the continuum at the location you think the recruitment advisor role should fall when executing recruitment. Now, write your initials along the continuum at the location you think you currently are in your role.



Applying Strategic Recruitment Practices

Review the following data sources to determine what information you have from your chapter. Consider how these data sources can help you be more strategic in your role and to improve recruitment overall.

Data source	Do I have this source?	Where can I get this information?	What have I learned from this information?
RFM data			
New member surveys			
Member evaluations			
CLC reports			
Campus-specific information			
Other Beta Base reports			
Other data sources			

Taking it Home

- Review all the information we discussed for the chapter you work with and walk through the same process to implement a strategic recruitment.
- Share what you've learned with your MVP, recruitment advisor or recruitment supervisor. Ask them to hold you accountable to strategic recruitment.
- Review your chapter's RFM report in Beta Base > Chapter Reporting > Membership > Reporting > Recruitment Results Report.



Setting a Strong Foundation

Program Description

Teams with a strong foundation have set clear expectations. These expectations are helpful to let others know what is expected of them. This session will examine different techniques for setting expectations, and how to use these expectations throughout the year.

Learning Objectives

- Write your personal leadership philosophy.
- List ways to share expectations.
- Explore a personal connection to your expectations.

Leadership Philosophy

Answer the following prompts to help you create a clear and concise leadership philosophy.

What do you believe about leadership?

What do you value about leadership?

How do you show up as a leader?

How do your actions demonstrate what you believe and value about leadership?

List what you expect from others and what others can expect from you.

Taking It Home

- Share your personal leadership philosophy with your supervisor and those you supervise.
- Set time aside on meeting agendas to review and reinforce expectations.
- Write personal notes of gratitude that demonstrate your confidence and competence in others.



Strategic, Fiduciary and Generative Perspectives on Retention

Program Description

Join members of International Council and the Leadership Development Committee (LDC) in an interactive program that will model how governance conversations take place at the highest levels of Gamma Phi Beta. This session is ideal for attendees interested in serving at the highest levels of the organization as well as those interested in current and future challenges impacting the area of member retention.

Learning Objectives

- Define three types of thinking and working necessary for effective board governance.
- Examine the ways strategic, fiduciary and generative work is interrelated.
- Explore generative, strategic and fiduciary perspectives on the topic of retention.
- Describe the work of the LDC in preparing members for service at the highest levels of the organization.

Modes of Thinking and Working

Generative: This mode involves the board as thoughtful leaders bringing wisdom and insight to critical issues facing the organization before or while policies, strategies, plans and tactics are formed and discussed.

Strategic: This mode concerns the strategic work that enables boards and management to set the organization's priorities and course in order to employ resources accordingly.

Fiduciary: This mode of work is intended to ensure that nonprofits are faithful to mission, accountable for performance and compliant with laws and regulations.



Generative Perspectives

- What will be most strikingly different about this organization in five years if we actively put time, resource and energy into (collegiate and alumnae) member retention?
- What headline would we most/least like to see about this organization regarding member retention?
- Is retention different than engagement? How so?
- Is retention a problem for the workforce or for members to solve?
- What assumptions are we relying on about how to retain members?
- Is member retention in the Sorority's best interest or in the members' best interest?

Strategic Thinking and Planning Perspectives

- Given our philosophy on member retention, what are the broad goals for moving the needle on this problem?
- Are there new, unexplored practices around member retention that we are unaware of?
- How does, or could, our plan build on the strengths of our organization or of our workforce?
- What is the potential benefit or gain of giving resources to this problem?
- Do we have the capacity, personnel and resources to solve this problem?

Fiduciary Perspectives

- Does the budget reflect our priorities, including this?
- What's the opportunity cost of not having putting resources toward this problem?
- Are there any legal or ethical issues with our plan?
- How will we be held accountable to our members for addressing this problem?

Taking it Home

- Thinking and working in these three modes is *not only* for those on International Council and other Sorority boards. Find a copy of *Governance as Leadership* (Chait, Ryan and Taylor) and read it with a sister or supervisor. Consider how you can look at your own volunteer work from these three perspectives.
- Engage your volunteer teams once a quarter in generative conversations around your work. Apply one or more of the conditions that can help suspend the rules and get your team thinking beyond "what is" to "what could be."
- Examine how your workforce team can be more aligned with strategic priorities. What kind of strategic questions can you incorporate into your team meetings, one-on-ones and execution of work?
- Given the organizational need to retain members in the coming years, what can you do personally to help work toward this goal?



Coaching Collegians: Making Recruitment Everyone's Business

Program Description

Does it ever feel like recruitment operates on an island? Come to this session to learn how you can coach collegians to engage the entire chapter in recruitment year-round. This session will focus specifically on the recruitment advisor's role gaining buy-in from collegians.

Learning Objectives

- Define 360° recruitment.
- Demonstrate how recruitment is connected to at least five other areas of chapter life.
- Communicate why recruitment is everyone's business to gain buy-in from stakeholders.
- Coach membership vice president to gain buy-in about recruitment year-round.

Buy-In Conversations

Think about a buy-in conversation you or the membership vice president (MVP) needs to have with an officer or member about recruitment. Follow the prompts to outline a buy-in conversation.

Example scenario: The administrative vice president (AVP) wants to end COB because chapter members are burnt out and instead should be focusing on officer elections.

Who? With whom do you need to have this conversation?

Example: Administrative vice president (AVP)

What? To what area of chapter life does this conversation pertain? What recruitment connections will help you build your case?

Example: Because the concern is over officer elections, gaining buy-in from the AVP about officer elections will require me to consider and communicate how the two areas of chapter life impact each other.

When? When is the best time to have this conversation?

Example: I need to address the concerns with the AVP immediately when they are brought to my attention. The longer the concerns go without being addressed, the more detrimental it can be to the chapter's motivation to COB.

Where? Where is the best place to have this conversation?

Example: I should have this conversation with the AVP in a neutral location.



Why? Why will creating buy-in with this person benefit recruitment? Why should this person care about recruitment?

Example: COB has a positive effect on officer elections because the women we recruit during COB are often leaders on campus and, therefore, are more likely to want to hold leadership positions in the organization and encourage others to do so as well. Likewise, when officer elections are smooth and positive for the chapter, members are more likely to talk about their leadership experiences positively with women leaders on campus.

How? How will you get buy-in from this person? How will you use your top three buy-in best practices in this conversation?

Example: I will gain buy-in from the AVP by sharing how continuing to COB will benefit officer elections. We will build a plan for how we can work together to help and support each other.

Coaching Model

Use this coaching model and ask the subsequent questions to your MVP when coaching her to have buy-in conversations.

Experience: Where are you going? What is the end goal? What needs to be accomplished?

Reflection: What is the current situation? What hurdles do you face in having this conversation? How do you feel about having this conversation? How might others perceive this conversation? Why is this conversation important for you, your sisters and your chapter?

Ideas: What options do you have to approach this conversation? What are the advantages and disadvantages to each option? What factors will help you weigh the options?

Action: With what option will you move forward? When will you move forward with that option? What do you need to do before, during and after the conversation to ensure it is a success? What could stop you from moving forward, and how will you overcome this?

Taking it Home

- Help the chapter see recruitment connections, too, by creating a recruitment connections map with them.
- Use the buy-in conversation outline to help your MVP think about how she can gain buy-in with the chapter.
- Learn more about Gamma Phi Beta's advising philosophy to help you think about how you can help your MVP learn from her role.



What's the Nominating Committee Got to do with Retention and Recruitment?

Program Description

In 2016, Bylaw amendments significantly changed the role and scope of the Nominating Committee's work in order to support the approved governance structure. Now the Committee actively works to connect with and recruit members to consider the possibility of serving at the highest levels of the organization and to engage those interested members to serve Gamma Phi Beta now and in the future. This session will provide attendees with deeper insight into this work, as well as how the Nominating Committee and the Leadership Development Committee's work supports each other.

Learning Objectives

- List at least four ways that the Nominating Committee impacts either the recruitment or retention of members into the volunteer pool.
- Describe three elements the Nominating Committee considers in the slating process.
- Compare and contrast the responsibilities of the Nominating Committee and the Leadership Development Committee.

The Role of the Nominating Committee in Recruitment and Retention

- Engaging Members in Cultivation Conversations
- Identifying Needs for the Upcoming Biennium
- Managing the Nominating and Slating Process
- Re-engaging Members Before, During and After Election Cycle

The Slating Process Considers the Following Elements

Competencies: Where are my strengths? Where are my opportunities for growth?

Application Materials: Who would I ask to complete my letter of recommendation?

Challenges and Opportunities: Do I have the right skills and experiences to meet the needs of the Sorority now or in the future? How do I need to further develop my own experiences, skills, talents, etc. to meet these needs as a board member?



Developmental Opportunities for High-Level Service

Be Yourself: Self-Awareness, Confidence and Resiliency

- Identify your values and develop your personal leadership philosophy.
- Use results from personality-type assessments to evaluate your strengths and weaknesses; explore how this impact how you show up in a team and interact with others.
- Challenge yourself to learn a new skill or set of knowledge to build your confidence.
- Review case studies on organizational change management and discuss with a mentor.

Grow with Others: Communication, Teamwork, Mentorship and Diversity and Inclusion

- Engage in a course on active listening, crucial conversation or group discernment processes.
- Explore literature on intersectional identities and/or identity development of college students.
- Join an organization like Toastmasters or take a community course on persuasive speaking.
- Invite colleagues and mentors to be on your personal board of directors; utilize this group as a sounding board and for advice on your growth opportunities.

Lead Your Community: Philanthropic Spirit and Community Participation

- Take an audit of the ways you currently contribute to your community. How else might you advocate for the community's needs or build inter-community partnerships?
- Engage with local alumnae in your area or within the alumnae chapter to be more actively involved in support of Girls on the Run, the Gamma Phi Beta Foundation or your local collegiate chapter.
- Join a board in your community to get experience at that level, such as the Parent-Teacher Association, a neighborhood association, nonprofit or grassroots organization. If possible, try to find a board that is more governance focused than operational focused.
- Participate in offerings from the Leadership Development Committee.

Learn for a Lifetime: ΓΦΒ Knowledge, Critical Thinking, Applied Learning and Personal Excellence

- Reflect on the aspects of the Sorority where you have experience and knowledge and where you do not. Are there new areas where you could offer your time, talent or treasures in order to have a broader understanding of the Gamma Phi Beta enterprise?
- Participate in a strategic planning process for your employer or an organization you serve.
- Join list-servs, social media groups, blogs or local groups that explore interfraternal, higher education or member association trends. Regularly journal or discuss how you see these trends manifested in Gamma Phi Beta's challenges and opportunities.
- Hone your critical thinking, decision-making, nonprofit management and financial analysis skills through platforms such as LinkedIn, Harvard Business Review or Coursera.



Taking it Home

- Schedule a meeting or phone call with a member of the Nominating Committee to further explore the opportunity to serve. Recommend sisters to the Nominating Committee through the referral form as well.
- Pick up a copy of *Race for Relevance*, *The Perfect Board* or *Governance as Leadership* to increase your understanding what it takes to be an effective member of a nonprofit board.
- Look-up and bookmark the video “Locating Yourself – A Key to Conscious Leadership” on YouTube. Use this as a tool for self-discovery the next time you consider a new role.
- Familiarize yourself with the member competencies, taking time to reflect on your own skills and experience as it relates to high-level volunteer service.
- Review the Gamma Phi Beta workforce structure (or other organizations of which you may be a member) and identify opportunities that may interest or challenge you in new ways. Look for depth and breadth of experiences.



Utilizing Risk Management to Change Chapter Culture

Program Description

How do you create a culture of risk management at the local chapter level? This program will discuss how you, as a volunteer supervisor, are critical in creating safer cultures at our chapters through risk management. Participants will leave with tangible steps to support chapter advisors and chapter leaders to be proactive in preventing situations that put our members at risk.

Learning Objectives

- Diagnose chapter challenges related to risk management.
- Utilize facts and data presented to make decisions related to risk management.
- Explain the rationale for Gamma Phi Beta policies and procedures related to risk management.
- Employ active listening skills to facilitate risk management conversations with collegiate officers.

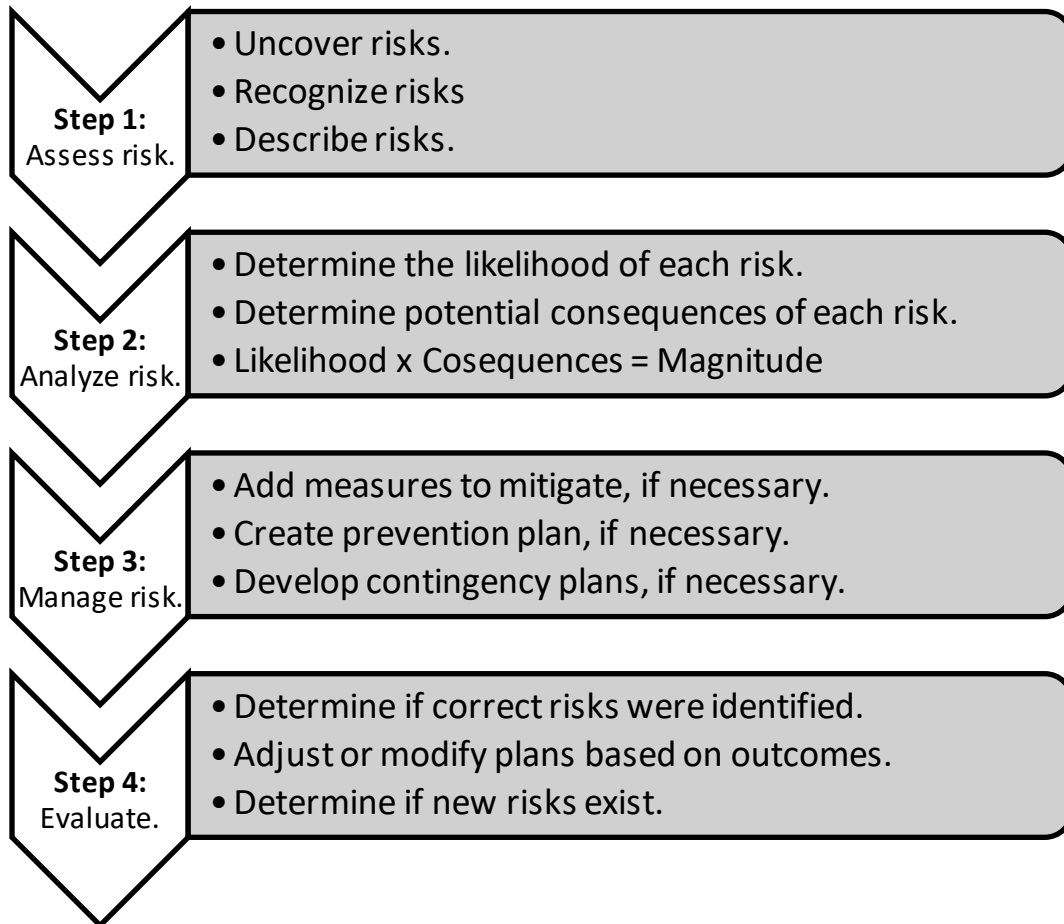
What is culture?

The system of shared beliefs, values, customs, behaviors and artifacts that the members of society use to cope with their world and with one another, and that are transmitted from generation to generation through learning.

What is risk management?

Risk management is the identification, evaluation and prioritization of risks followed by the use of resources to minimize, monitor and decrease the likelihood of unfortunate events.

What role does culture play in risk reduction?



Taking It Home

- Review old events and practice using the risk management outline to identify, assess, manage and evaluate risks. Check your past work to understand what you might do the same or differently in the future.
- Evaluate and prioritize the three opportunities you listed above. Set personal deadlines for accomplishing these goals.



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