Gamma Phi Beta
Convention Reports 2022
ST. LOUIS, MISSOURI

As long as we’re together.

Gamma Phi Beta
Convention Reports 2022
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LEGACY CELEBRATION TASK FORCE REPORT

Information contained in this report is current through April 1, 2022.
International Council Reports
Dear sisters and friends of Gamma Phi Beta,

The 2020-22 biennium is one marked with unprecedented challenge, change and perseverance. The biennium began amid the COVID-19 global pandemic. As of August 1, 2020, most places of business were still not open to the public, colleges and universities were beginning virtual learning exclusively, masks were universally required, and we were without a vaccine. Day-to-day life was disrupted, important life milestones and celebrations were put on hold and travel was suspended. We all operated with uncertainty and concern for our health and the health of our family and friends. Our collegiate members returned to school in fall 2020 but not necessarily to campus, with most colleges and universities offering virtual classes only. To date, nearly 1 million people in the United States died because of COVID-19. This overwhelming number is more than a simple data point. It encompasses the lives of sisters, family members, friends and loved ones who we mourn deeply. Following the release of a vaccine, some elements of life returned to pre-pandemic activity. However, through surges resulting from the Delta and Omicron variants, we remained in a state of uncertainty and necessary adaptability.

As we close the biennium, we prepare for our first in-person Gamma Phi Beta event, Convention 2022, since 2019. We cannot begin to understand the impact of COVID-19 global pandemic moving forward and anticipate echoes of consequence in the coming years. In the biennium, we closed three chapters, all directly impacted by pandemic.

The impact of COVID-19 was felt not only in our personal lives, but also in our Gamma Phi Beta sisterhood. We pivoted from relying on in-person activities to connect and conduct business to connecting solely through virtual platforms. We conducted our first-ever initiation and installation of a collegiate chapter virtually, Eta Chi (California-San Marcos). We presented and won our first-ever virtual extension presentation, Villanova University. We held our first-ever REAL Leadership Retreat for volunteer leaders and workforce team members. We held chapter, team and board meetings virtually. We hosted virtual sisterhood events, including trivia nights and bingo. All these activities demonstrated an ongoing interest and need in sisterhood and friendship during times of uncertainty. Connection remains the fundamental component of our DNA as a sisterhood.

In summer 2020, the murders of Ahmaud Arbery, George Floyd and Breonna Taylor ignited a racial justice movement requiring both individual and institutional reckoning of our role in racism and discrimination. Leaders in all parts of our sisterhood began evaluating the ways in which our organization has been complicit in discrimination and begin making the necessary change to reconcile, rectify and restructure a sisterhood that is best when it is inclusive. The Belonging, Equity, Diversity and Inclusion (BEDI) work this biennium can be found at GammaPhiBeta.org/PrioritiesAndActionPlan. Gamma Phi Beta will continue to demonstrate an unwavering commitment to BEDI as we believe the greater the diversity of women that are represented in Gamma Phi Beta, the more vibrant and enduring our sisterhood.

Another aspect of the 2020-22 biennium was the Abolish Greek Life (AGL) movement. Reminiscent of anti-Sorority activism in the 1960s, the movement critiqued sorority and fraternity’s role in upholding white supremacy, sexism, discrimination and elitism. Our chapters felt the impact of this movement both among their members and on campus. At the start of the biennium, the Epsilon Chapter at Northwestern University voted to relinquish their charter, citing a desire to disrupt the harm sororities have caused minoritized populations through time. Similar votes took place at chapters in the United States but did not pass. Phi Chapter (Washington University) began meaningful work to address the chapter and community criticisms; they continue to model ways Gamma Phi
Beta can be a leader in anti-racism work. The AGL movement took place during the pandemic in a fully virtual environment. As we saw students return to on-campus learning we saw a decrease in the AGL activity, though we know the criticisms of the movement continue to challenge the relevancy of sorority in today’s world.

In addition to calls for abolition of sororities and the lingering effects of pandemic on higher education, birth rates have continued to decline in North America. Most notably, the looming enrollment cliff anticipated in fall 2026, which is tied to the 2% decrease in the birth rate in 2009. While birth dearth does not impact enrollment projections for all institutions of higher education, according to Higher Ed HR Magazine, there are many where we have chapters where we will see the impact on our ability to exist.

For the 2020-22 biennium, Gamma Phi Beta’s strategic priorities have been strategic financial discipline, innovative and accessible member engagement and inclusive and diverse membership. This report will capture the hard work of our volunteer leaders and professional staff in advancing Gamma Phi Beta within these priorities. Before the end of the biennium, International Council will complete an assessment of the organization, industry and higher education to determine which of our strategic priorities will be named as the most critical in the 2022-24 biennium. The trends in enrollment and birth rates will be considerations in these discussions.

Internally, Gamma Phi Beta has continued to evaluate and refine the shared services model, One Gamma Phi Beta. In this model, the Sorority, the Facilities Management Company and the Foundation share key staff members to streamline decision making and work while using resources efficiently and strategically. When all entities are aligned and working in partnership, while respecting legal and fiduciary parameters, we can maximize our collective strength and sisterhood to achieve business outcomes.

The next two years will lead us to 150 years of Gamma Phi Beta with a culmination of celebratory events and initiatives ending in November 2024. We have already begun the work of completing a historical contextualization project and starting a digitalization of our history. This milestone celebration provides us the opportunity to both reflect and envision Gamma Phi Beta’s place in the world and the impact of our sisterhood. I hope you can join us for one of the many opportunities to celebrate our sisters, honor our history, and connect with Gamma Phi Beta. It is my hope this will be a time where we can anchor all that has happened these past two years in the 2020-22 biennium and move forward with the confidence of our collective impact as sisters in Gamma Phi Beta.

There are many words that can be used to describe the 2020-22 biennium, but the most salient, to me, is connection. The sisters and friends who demonstrated loyalty to one another and to our dear Sorority were the light in dark times. The connection we felt despite distance, whether six feet or 600 miles, was an enduring force of hope and will continue to create lift as we look to the 2022-24 biennium.

With gratitude in IIKE,

Autumn L. Hansen (Idaho)
International President 2020-22
The 2020-22 International Council (IC) focused on three strategic priorities:
• Innovative and accessible lifetime member engagement
• Inclusive and diverse membership
• Strategic financial discipline
This report is a summary of the activities aimed at achieving these priorities.

INNOVATIVE AND ACCESSIBLE LIFETIME MEMBER ENGAGEMENT

Committee Philosophy
Within Gamma Phi Beta, or any organization with a governance board, committees play an important role. Committees are used to drive the work of the Sorority forward and to advance the mission. It’s the committee level where people with specific talents and skills are brought together to better the Sorority and thoroughly vet issues.

Knowing the importance of committees to our organization, IC developed Gamma Phi Beta’s Philosophy on Committees to ensure our committees understand their purpose and the scope of their authority.

To learn more about Gamma Phi Beta’s Philosophy on Committees, please visit GammaPhiBeta.org/About-Us/International-Headquarters/Committees.

To learn more about the work of the work of these committees over the course of the biennium, visit pages 57-65.

Connect with Council
During this biennium, it was more difficult for IC to connect with the membership given the restrictions associated with the COVID-19 pandemic. We longed for the opportunity to interact with members. To adapt to the environment, IC began holding Connect with Council Zoom meetings. Connect with Council was a new forum for workforce members and chapter presidents to connect with members of IC and subject matter experts. Topics covered throughout the biennium included:

• The Sorority’s strategic priorities
• Belonging, Equity, Diversity and Inclusion (BEDI) priorities
• Fostering appropriate civil discourse within our sisterhood
• The Sorority’s current and future financial outlook
• Providing advocacy and support to members who have experienced or witnessed an incident of bias or discrimination.

INCLUSIVE AND DIVERSE MEMBERSHIP
We want to be transparent about our commitment to making Gamma Phi Beta a place of belonging and inclusion. We firmly believe that the more diverse our membership, the more vibrant our sisterhood.
Legacy Policy and Celebration Task Force
As part of our efforts to make Gamma Phi Beta more diverse, we need to make our recruitment process more focused on the values and merits of each potential new member. With this goal in mind, and following months of thoughtful evaluation, in-depth discussion and careful review of our policy and member survey responses, we decided to eliminate the preferential treatment of legacies during recruitment. The elimination of this policy ensures every potential new member is given an equal opportunity to receive an invitation to join Gamma Phi Beta.

Let us be crystal clear. We honor and cherish the special bond between legacies and legacy makers just as much today as we did yesterday. Legacies will be welcomed and encouraged to join Gamma Phi Beta and we are committed to seeking new ways to celebrate that unique relationship. As a result, we created a task force to develop new and meaningful ways to honor that bond. We believe there are more meaningful ways to honor legacy makers and their legacies throughout a lifetime and not just during the membership selection process.

To read the full Legacy Celebration Task Force Report, visit page 66.

Alumnae Initiate Task Force
Another way Gamma Phi Beta seeks to expand its membership and increase diversity is through its alumnae initiate program. During this biennium, IC convened an alumnae initiate task force to examine the processes and procedures around this program, including how to better publicize the opportunity to join our membership and map an alumnae experience for these new members. For additional information regarding Gamma Phi Beta’s alumnae initiate program, please visit GammaPhiBeta.org/Member/Alumnae/Additional-Resources.

Reverse Mentoring
To assist Gamma Phi Beta in retaining its strength and relevance as an organization, members of IC participated in a reverse mentoring program as a way to help the different generations of members present in our organization forge connections, foster dialogue and deepen knowledge on sensitive topics, and offer both Millennials and Generation Z additional opportunities to feel engaged and valued.

Under the program, members of IC selected their mentor. Members of IC met monthly with their mentor and then shared learnings from these conversations with other members of IC so that all board members benefited from the conversations. Questions explored during the conversations included:

• What is Gamma Phi Beta doing that you think we need to continue or do more of? What do we need to stop doing?
• What do you find most meaningful about your membership in Gamma Phi Beta right now?
• How do you imagine Gamma Phi Beta being a part of your life after college?
• What makes you proud to tell others about your membership in Gamma Phi Beta? Do you ever hesitate in telling others? Why?
STRATEGIC FINANCIAL DISCIPLINE

20-Mile March
Reading “Great by Choice” by Jim Collins was part of the onboarding process for the 2020-22 IC. The 20-mile march is a concept from this book. Enterprises that prevail in turbulence self-impose a rigorous performance mark to hit with great consistency, like hiking across the United States by marching at least 20 miles a day, every day. The march imposes order amidst disorder, discipline amidst chaos and consistency amidst uncertainty. IC adopted the 20-mile march into its strategy and chose the percentage of alumnae in good standing as its focus. Increasing the percentage of members paying their alumnae dues provides financial stability, and stable finances provide more opportunities for programs and offerings to the membership that, in turn, results in increased member engagement.

When we started this march in November 2020, there were 7,632 alumnae in good standing. As of June 15, 2022, there are 7,945 alumnae in good standing. This has been the result of international staff’s laser focus on this area, including such tactics as Sponsor a Senior, where alumnae pay the alumnae dues of a graduating senior.

Partnership with Fairwinds Estate Winery
Gamma Phi Beta is impacted by economic factors like any other business. Following the financial hardship caused by the COVID-19 pandemic, we were reminded of Gamma Phi Beta’s heavy financial dependence on member dues. With fluctuations in college enrollment, we must proactively seek and consider other revenue streams that are reliable and predictable. To ensure our sisterhood remains strong for years to come, it is in the best interest of Gamma Phi Beta to diversify our revenue streams when possible. Additionally, to meet our goals in the areas of BEDI, we need financial resources.

That’s why we partnered with Fairwinds Estate Winery to create First Moon. Gamma Phi Beta receives 20% of all proceeds from sales, with these funds designated for the Sorority’s greatest area of need, currently our BEDI initiatives. To date, we have received nearly $53,000 from this partnership.

Financial State of the Sorority
As of February 28, 2022, the Sorority’s revenue is on track to meet budget estimates. Expenses will end the year below budget primarily due to staffing vacancies throughout the year. In fiscal year 2022, the Sorority budgeted $2.3 million of expenditures to be allocated to the Facilities Management Company and the Foundation through the existing Memorandums of Understanding. This allocation will also end the year below estimates due to reduced personnel expenses.
A Vision for our Future

Gamma Phi Beta’s strategic plan for fiscal years 2021-24

THREE PRIORITIES FOR FISCAL YEAR* (FY) 2021 AND 2022

1. Strategic Financial Discipline
2. Innovative and Accessible Lifetime Member Engagement
3. Inclusive and Diverse Membership

*Gamma Phi Beta’s FY begins August 1 and goes through July 31 annually. This strategic plan is for August 1, 2020, and goes through July 31, 2024.

Our shared practical vision for our MEMBERSHIP includes:
- Innovative and Accessible Lifetime Member Engagement**
- Inclusive and Diverse Membership**
- Accessible Member Experiences
- Thriving Collegiate Chapters
- Valued Lifelong Gamma Phi Beta Identity

Our shared practical vision for our CULTURE includes:
- A Strong Culture of Trust and Appreciation
- A Vibrant Culture of Philanthropy
- A 150th Celebration

Our shared practical vision for our ENTERPRISE includes:
- **Strategic Financial Discipline
- Aligned Purposes and Vision
- Capitalized, Innovative and Strategic Opportunities

Our shared practical vision for our INDUSTRY includes:
- Recognition as a Bold Leader
- Leveraged Strategic Industry Partnerships
- Strengthened Community Impact

**Indicates a top priority for FY21 and FY22.
Workforce Reports
To Our Valued Members:

The last biennium greatly tested the resiliency of our sisterhood, dedicated staff and steadfast, loyal volunteers. Weathering the unknowns and ongoing impact of the rising social justice movement and pandemic immediately brought the collective Gamma Phi Beta together and I am grateful beyond words for the commitment and effort of all of Gamma Phi Beta.

One Gamma Phi Beta has continued to evolve and strengthen as the Sorority, Foundation and Facilities Management Company (FMC) boards and their committees responded to the urgency of world events and made strategic decisions for the immediate and long-term future of our organization. Our shared services, staff and volunteers worked toward the unique strategic priorities of each entity while providing transparency across boards to ensure decision making was aligned and consistent for all of Gamma Phi Beta.

Though we spent most of the biennium in a hiring freeze with staff furloughs and restricted travel, in the past eight months, we have been able evaluate the pandemic’s impact on the industry overall and restaff for success in the new normal. Notably an increase in our alumnae engagement staff is allowing us to increase our focus on alumnae engagement events, experiences and groups with a hope of increasing and maintaining the relevancy of Gamma Phi Beta membership for a lifetime.

I am proud of the ongoing work of One Gamma Phi Beta and our vision of being an anti-racist organization. International Headquarters, in partnership with an external consult and a staff BEDI committee, is evaluating our human resources practices, process and procedures as well as staff and volunteer onboarding and development programs to ensure Gamma Phi Beta is an inclusive and accessible place to work and volunteer.

As we wrap up this biennium, we are excited to set new strategic priorities across One Gamma Phi Beta and enthusiastically race toward our 150th celebration in 2024! International Council, the Board of Trustees and the FMC will enter the new biennium collectively focused on this major milestone while also maintaining our commitment to financial security and keeping a close watch on what new challenges or opportunities may be around the corner.

The following reports outline the collective accomplishments of our workforce over the biennium, and highlight the work being done to advance One Gamma Phi Beta.

While we ended the last biennium feeling anxious and worried about the challenges ahead, we enter the new biennium inspired and hopeful at the thought of celebrating 150 years of our sisterhood. We look forward to renewing the vision and goal of each board and working collectively, as staff and volunteers work to move Gamma Phi Beta into the next 150 years.

Sincerely,

Megan Smiley Wick (Washington State)
Executive Director
**Financial State of One Gamma Phi Beta**

Throughout the biennium, the Sorority, Facilities Management Company (FMC) and the Foundation have prioritized financial sustainability while dealing with the impact of COVID-19. In fiscal year 2021, declines in membership, reduction of facility occupancy and limited fundraising opportunities resulted in reduced revenue across all three entities. Expenses were also significantly below historic levels due to travel restrictions, virtual rather than in-person events and adjustments to staffing which included a reduction in personnel and a hiring freeze. At the end of fiscal year 2021, all surplus funds were designated for future use in operating reserves, the 150th celebration, critical care of chapters and human resource recruitment. In fiscal year 2022, revenue flattened, expenses continue to be closely monitored and both travel and in-person events returned.

The Finance team works closely with all three boards, volunteer and staff committees and International Headquarters departments to provide accurate and timely financial information. This financial information demonstrates accountability of how Gamma Phi Beta’s resources are being used and ensures operational efficiencies and controls are in place.

In addition to the day-to-day responsibilities of the Finance team, during the biennium:

- The Sorority and FMC investment portfolios were transitioned to a new investment advisor, Bernstein
- New accounting software solutions to replace software that will no longer be supported were thoroughly evaluated

Overall, the largest sources of revenue for Gamma Phi Beta include rental income and facilities fees, membership dues and fees and contributions.

Fiscal Year 2020-2021 Revenue

- Rental Income and Facilities Fees: 45%
- Membership Dues and Fees: 33%
- Contributions/Grants: 15%
- Trademarks and Licensing: 6%
- Conferences: 1%
- Other Income: 0%

Year-end revenue totaled 12,401,775.

Fiscal Year 2020-2021 Expenses

- Alumnae and Collegiate Support: 64%
- General Administration and Development: 18%
- Education and Leadership: 8%
- Communications: 5%
- Philanthropy and Financial Aid: 5%
- Conferences: 1%

Year-end expenses totaled 10,743,345.

Support of Gamma Phi Beta alumnae and collegians and education and leadership account for 71% of total spending.
Gamma Phi Beta’s Marketing and Communications division is made up of Conferences and Meetings and Marketing and Communications departments and includes Convention volunteers. Our team creates effective marketing, communications, public relations and event strategies that support Gamma Phi Beta initiatives and priorities and champions the organization’s programs, goals and vision, rooted in our purpose as an organization that operates exclusively for educational, charitable and social purposes.

Our efforts serve both internal audiences (members) as well as external constituencies (universities, parents, peer groups, partners and the public). We counsel and lead our stakeholders, as together we implement best practices in marketing, communications, public relations and event management to create mutually beneficial relationships with individuals and organizations vital to Gamma Phi Beta’s development and future. Our team’s focus is to protect, reinforce and elevate Gamma Phi Beta’s reputation.

The following showcases collaborative efforts between all departments, followed by each department’s individual accomplishments.

**COLLABORATIVE DIVISION EFFORTS**

- In May 2021, the Fraternity Communications Association (FCA) held its Annual Awards Program on a virtual platform due to COVID-19. Our division was awarded in five categories: first place in Social Media Engagement (the third year in a row we have been recognized in this category), second place in eNewsletter for the Collegiate Digest, third place in Printed Materials – Education for Fidelity for New Members: New Member Guide, third place in Critics’ Choice – Cover Design for *The Crescent* 2020 Cover (“40 Under 40”) and third place in Critics’ Choice – Design – Single Page for *The Crescent*, “Building Strong Girls.”
- In April 2022, FCA held its Annual Awards Program in person, and our division was awarded in three categories: third place in Educational Resource for the BEDI Summit Collegian Companion Guide, second place in Alumni/Alumnae Engagement Effort for the Clara Project Participant Guide, and third place for Story Packaging – Long for “Generation to Generation” in *The Crescent*.
- We completed more than 1,500 work orders across all divisions, for emails, surveys, website updates, resources, videos, graphic design and copying/editing/styling. Marketing sent more than 600 emails this biennium (includes emails that are already on the calendar through July 2022). That’s 8.4% more this biennium than 2018-20.

**COMMUNICATIONS DEPARTMENT**

- The BEDI Summit debuted in February 2020 and Communications supported the event by providing styling and design to four interactive workbooks, videos and PowerPoints.
- The Communications department worked closely with the director of events and conferences to style and design marketing collateral for virtual events such as Convention, Founders Day, Senior Celebration and REAL Leadership Retreat.
- In response to the COVID-19 pandemic, *The Crescent* switched to printing two issues during the 2020 calendar year to save on costs. We returned to printing four issues a year during the 2021 calendar year and stopped sending extra copies to collegiate and alumnae chapters as well as to interfraternal partners.
- To be more accessible we switched online reading platforms for *The Crescent*. The new platform allows for a more accessible online reading experience as well as the option to track statistics on views.
- A 150th celebration logo was created during the biennium to prepare for the 150th celebration in 2024.
CONFERENCES AND MEETINGS DEPARTMENT

- The inaugural Belonging, Equity, Diversity and Inclusion (BEDI) Summit kicked off in February 2021 as the Sorority’s first ever leadership summit dedicated solely to creating a more just, equitable and inclusive Gamma Phi Beta. The inaugural BEDI Summit had 1,749 registrants and brought together newly elected collegiate executive council officers, new member educators, BEDI chairwomen, chapter advisors, volunteers, friends and staff who viewed the programing virtually from all over the world. Peak viewership at this all-day event was 1,514 concurrent views in our morning session and 2,374 unique views. In our afternoon session we had 1,348 concurrent views and 1,854 unique views.

- The BEDI Summit was back in February 2022, with 1,559 registrants for a two-day summit. At peak viewership we had 1,335 concurrent views and 2,261 unique views on day one. On day two, we had 1,357 concurrent views and 1,108 unique views.

- Since we could not yet meet in person for the REAL Leadership Institute, we reformatted the event to a virtual one called REAL Leadership Retreat. This event had 245 registrants and brought together our workforce comprised of volunteer leaders, chapter advisors and professional staff for training and development.

- In November 2020 and 2021 we celebrated our Founders Day virtually with hundreds of collegiate and alumnae members.

- We executed the last of our virtual Senior Celebrations in May 2021.

- We helped to implement eight virtual Connect with Council events from March 2021 to May 2022.

- Beginning in fall 2020, we began to assist our remote chapters with virtual initiations. In 2020, we executed more than 105 virtual ceremonies with 180 chapters. In 2021, we conducted 35 virtual ceremonies with 120 chapters.

MARKETING DEPARTMENT

- The Marketing department is responsible for the execution of Gamma Phi Beta’s digital marketing efforts and campaigns (website, social media, email and video) and licensed vendors. In early 2022, Marketing transitioned the management of philanthropic efforts and the Life Loyal and international alumnae dues to the Member Experience team. Marketing will still manage the Sorority’s relationship with Girls on the Run and work collaboratively with alumnae engagement to plan and execute successful Life Loyal and international alumnae dues campaigns.

- In early 2021, Gamma Phi Beta partnered with Fairwinds Estate Winery to bring an exclusive wine brand, First Moon Napa Valley, to Gamma Phi Beta members. Since the launch, 10 bottles have been designed for sale, including two featuring the artwork of Gamma Phi Beta members and more than 600 members have joined the Crescent Club, receiving two shipments of wine per year. Proceeds from First Moon are given back to Gamma Phi Beta’s greatest areas of need, currently designated for our Belonging, Equity, Diversity and Inclusion efforts.

- During the biennium, Gamma Phi Beta launched a cultural heritage month social media strategy, which seeks and shares members stories related to their salient cultural identities. We also incorporated heritage celebrations and holidays into the Collegiate Digest.
Marketing created and launched four Facebook groups to engage sisters around interests and identities: Gamma Phi Beta Black, Brown, Indigenous and Women of Color, Gamma Phi Beta Foundation, Gamma Phi Beta LGBTQIA+ and Gamma Phi Beta Recipes. We also brought the existing Crescent Catchers group under the Gamma Phi Beta Official Page.

Marketing led all digital and printed appeal efforts for the following events during the biennium for the Foundation: Founders Day, End of Year Giving and Kendra Scott Gives Back.

Hearts, traditionally a Convention-year campaign was launched virtually in spring 2021.

Chapter Challenge made its return in fall 2021. Marketing created a new landing page for this four-day online fundraising event, providing an engaging experience for donors.

Gamma Phi Gives Day was held March 8-9, 2022. To execute this brand-new initiative, Marketing designed an informational page, a giving page, wrote an ambassador manual, designed a social media campaign for three networks and sent seven unique emails over the 24-hour period.

In collaboration with the alumnae engagement department, Marketing created digital campaigns for Dinner with 12 Sisters, Confident Women of Character and the newest initiative, Gamma Phi Get-Together.

Through our partner Affinity, we worked with nearly 400 licensed vendors that are approved to sell an array of Gamma Phi Beta branded items.

Since the launch of Life Loyal at Convention 2016, nearly 6,000 members have opted to fulfill their international alumnae dues financial commitment for life. Ongoing campaigns – through print, email, social and digital ads – are conducted to encourage members to sign up.

Sponsor a Senior continues to engage our most generous alumnae and more than 1,200 seniors have had their first international alumnae dues or Life Loyal memberships sponsored since spring 2020.
The biennium saw decline in our collegiate membership numbers, primarily attributed to COVID-19, which appeared to significantly deter potential new members from participating in primary recruitment.

### MEMBERS

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<th>Previous Biennium</th>
<th>Current Biennium</th>
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<td>Members ever initiated</td>
<td>228,992</td>
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<tr>
<td>Living alumnae members</td>
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<td>Alumnae chapter members</td>
<td>5,112</td>
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<tr>
<td>Collegiate members</td>
<td>16,461</td>
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<td>New members pledged</td>
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*Note: Statistics as of April 1, 2022*

### ALUMNAE ENGAGEMENT DEPARTMENT

Guided by our alumnae engagement philosophy, we continued to expand programs and services for alumnae members and chapters to engage more alumnae in Gamma Phi Beta. While the pandemic paused many traditional in-person programs, significant effort was made to continue innovation and excitement about a growing alumnae experience. Staff and volunteers worked together to encourage a lifetime commitment to our sisterhood.

#### Alumnae Chapters

Gamma Phi Beta has 126 alumnae chapters, ranging in size from six to 113 members. Nine alumnae chapters have closed this biennium. Closure of alumnae chapters was primarily attributed to administrative closures and the closure of former Crescent Circle groups that were not sustainable as alumnae chapters.

Gamma Phi Beta remains committed to providing support and resources to alumnae chapters. This biennium, we released the Alumnae Order of the Crescent (AOOC). The AOOC is a tool used by alumnae chapter leadership to determine both strengths and opportunities for improvement of the alumnae chapter utilizing a rubric. In addition to the rubric, a planning guide and a goal-setting guide were released to assist alumnae chapter leaders.

Additionally, the reporting timeframe for good standing was changed to align with the calendar year. Previously, the good standing deadline varied based on the date of Convention. This change prevents the need for a variable deadline in the future.

#### Member Milestones

In August 2020, we began our member milestones volunteer team. This team of volunteers recognizes members celebrating the 50-year and 75-year anniversary of their membership by sending handwritten notes or making phone calls to members. This group of volunteers has devoted time to researching 50 and 75-year members, updating contact information in the database and sending personalized outreach to members celebrating a significant milestone in their membership.
Alumnae Initiates
Our alumnae initiate program continues to be an opportunity to welcome new members to our sisterhood. There were seven alumnae initiates in fiscal year 2021. There have not been any alumnae initiates in fiscal year 2022.

During the biennium, International Council convened a task force to review our alumnae initiate program. In October 2021, the task force submitted a report to International Council which was reviewed and accepted.

Dinner with 12 Sisters
In February 2020, Gamma Phi Beta introduced a new program for alumnae engagement, Dinner with 12 Sisters. Dinner with 12 Sisters is designed to be a one-night, low-pressure, bonding experience that allows alumnae to meet and connect with others in their community. The program began in 2020 with 15 dinners taking place in 13 cities. This event did not occur in 2021 due to COVID-19. The program relaunched in February 2022 with 11 dinners taking place in 10 cities. We look forward to expanding the program in the upcoming biennium.

Confident Women of Character Series
Our Confident Women of Character series allows members to share their passions with fellow sisters, using their expertise to inspire conversation and connection with women at all stages of life. The series is an educational initiative exclusively for alumnae dues payers and Life Loyal members. The program launched in spring 2020 and continues to engage alumnae members today. During the biennium, 15 Confident Women of Character webinars were hosted!

Gamma Phi Get Together
Gamma Phi Get Together is an opportunity to connect with sisters near and far and celebrate the sisterhood that connects Gamma Phi Betas. The event takes place on September 24 to honor Gamma Phi Beta’s Founders’ first meeting. In 2020, 42 events occurred across the country. In 2021, 13 events occurred across the country. The majority of events in 2021 took place virtually due to COVID-19 restrictions. The Alumnae Engagement department looks forward to bringing the program back on September 24, 2022!

Merit, Service and Loyalty Awards
Individual member recognition remains important in honoring members for their dedicated service to Gamma Phi Beta at all levels. In fiscal year 2021, 20 members were recognized. Six members were added to the Merit Roll, seven to the Loyalty Roll and seven to the Service Roll. In fiscal year 2022, four members were recognized with the Merit Roll award. Award winners can now purchase award jewelry through Herff Jones, rather than through International Headquarters.
International Alumnae Dues, Life Loyal and Sponsor a Senior
In January 2022, the oversight of international alumnae dues, Life Loyal and Sponsor a Senior transitioned from the Marketing department to the Alumnae Engagement department. While the full transition of the three programs will take the remaining duration of the fiscal year, significant progress has been made to transition a majority of the program’s responsibilities to the Alumnae Engagement department.

CHAPTER SERVICES DEPARTMENT
In the past biennium, the Chapter Services department has worked closely with regional and chapter volunteers to support Gamma Phi Beta’s collegiate chapters and the experience of our collegiate members.

Collegiate Chapters
Gamma Phi Beta has 137 active collegiate chapters in the United States and Canada. Over the last biennium, three collegiate chapters closed due to low membership numbers — Zeta Xi (College of Idaho), Gamma Mu (Minnesota State-Moorhead) and Eta Mu (Duke).

The reporting timeframe for good standing was changed to align with the calendar year. Previously, the good standing deadline varied based on the date of Convention. This change prevents the need for a variable deadline in the future.

Collegiate Leadership Consultant (CLC) Program
In April 2020, Gamma Phi Beta suspended the CLC program. In fall 2021, three collegiate leadership consultants were hired to support the extension project at Villanova University. Upon postponing the project until fall 2022, the CLCs began traveling to collegiate chapters around the country. Twenty-three collegiate chapters received a CLC visit with focuses on recruitment, risk management or general chapter operations. Five consultants have been hired to support chapter operations in the 2022-23 academic year and will begin in July 2022.

Regional Restructure
Over the last biennium, a team of staff and volunteers assessed the regional structure and proposed changes that moved the Sorority from eight to 12 regions. The regional restructure officially launched in January 2022. The shift to more regions allows chapters to receive more individualized volunteer support as regional team leaders, collegiate chapter supervisors, finance supervisors and recruitment supervisors now support a smaller portfolio of chapters.
Social Event Compliance
Over the course of the biennium, chapter services managers have conducted at least two social event consultations with each collegiate chapter to ensure chapters understand the policies and procedures designed to minimize risk during social events. In addition, chapter services managers review each social event with alcohol registered by collegiate chapters to help chapters mitigate risks and comply with the Sorority policies and procedures.

Belonging, Equity, Diversity and Inclusion
In fall 2020, each collegiate chapter added a Belonging, Equity, Diversity and Inclusion (BEDI) chairwoman to their chapter leadership roster. This position creates and executes an annual BEDI action plan for each chapter to create a more inclusive and equitable experience where diverse members have a sense of belonging. In addition to the BEDI chairwoman, the Sorority welcomed a BEDI volunteer team comprised of a BEDI team leader and 13 BEDI specialists who serve as resources for our collegiate chapters.

COLLEGIATE EXPERIENCE DEPARTMENT
Extension
During the biennium, National Panhellenic Conference (NPC) released approximately eight extension opportunities at different universities across the United States. Extension opportunities have declined from the previous biennium where NPC released approximately 30 extension opportunities.

Due to declining extension opportunities, Gamma Phi Beta was not able to start any new chapters in this biennium. California State University-San Marcos (CSUSM) was officially installed as the Eta Chi Chapter on September 9, 2020, after operations were halted due to the emergence of COVID-19 in spring 2020. Gamma Phi Beta was invited to join the Villanova University fraternity and sorority community and start a new chapter in spring 2022. Due to the emergence of the highly contagious Omicron variant of COVID-19, extension recruitment was postponed to fall 2022.

The extension committee reviewed and updated the committee charter, completed its annual review of the sorority growth rubric, and evaluated the questions the Sorority asks during exploratory and advance visits to identify opportunities for Belonging, Equity, Diversity and Inclusion principles to be incorporated into Gamma Phi Beta’s decision-making process.

Finance
At the beginning of the biennium, the Sorority transitioned all collegiate chapters from Billhighway to OmegaFi, its new financial software provider. We continue to identify ways to use the OmegaFi services to better meet and support our needs while focusing on improving the financial health of our chapters.

An alternative dues model working group was established with the project description to “evaluate the feasibility and possible implementation of offering alternative dues models for chapter members.” Focus groups were conducted with financial vice presidents, financial advisors and finance supervisors to gather feedback on implementing an alternative dues model. A report of the focus group findings was shared with International Council, and it was decided Gamma Phi Beta would not move forward with implementation of alternative dues models. Several resources were created based on the alternative dues model focus group findings.
**Philanthropy**
This biennium, we launched CrowdChange, an online fundraising tool collegiate chapters can use to collect electronic philanthropy donations. A full-time philanthropy manager was hired to oversee collegiate chapter philanthropic fundraising efforts, assist with funds submission and provide support to the Gamma Phi Beta Foundation. During the biennium, chapters hosted 193 Moonball events and 547 secondary philanthropy events. These philanthropic events raised $928,813.17 for Girls on the Run, $31,346.75 for local organizations and $18,729.34 for the Gamma Phi Beta Foundation.

**Recruitment**
During the biennium, the Sorority implemented changes to foster a more diverse, equitable and inclusive approach to recruitment and membership selection. International Council decided to eliminate the preferential treatment of legacies during recruitment effective fall 2021. Following this decision, the Sorority replaced its system of alumnae references with a Potential New Member (PNM) Introduction Form. The PNM Introduction Form eliminates some barriers potential new members face accessing alumnae references by allowing anyone to recommend a potential new member to Gamma Phi Beta, whether they are a member or a non-member, including the potential new member. As a result of this change, the Alumnae Reference Chairwoman (ARC) volunteer position concluded May 17, 2021. Gamma Phi Beta received 7,087 reference forms in 2020-21. With the introduction of the PNM Introduction Forms Gamma Phi Beta received 6,226 for fall 2021 primary recruitment alone.

The Belonging and Inclusion Committee audited several recruitment resources and provided suggestions on ways to incorporate BEDI into recruitment. Two working groups of staff and volunteers were created in 2021 to review and revise recruitment resources on the Sorority’s standards of membership, membership selection process and the primary recruitment and continuous open bidding (COB) reports in Beta Base. The updated membership selection process and Beta Base reports were introduced for chapters in summer 2021. There is currently a working group tasked with developing a recruitment school template that chapters can use to plan for primary recruitment and COB with an anticipated release of summer 2022.

Due to the impact of the pandemic on recruitment, no chapters were placed on automatic probation for falling below 90% of campus Panhellenic Total during this biennium. Staff and the recruitment team continue to monitor chapters with gaps to Total, especially those below 76% of Panhellenic Total. With the implementation of the Sorority’s four-week new member program, chapters have been able to conduct COB more frequently either after initiating their new members from primary recruitment or hosting two different COB periods and initiating two different COB new member classes.

**EDUCATION DEPARTMENT**
The Education department is responsible for providing both technical and holistic education to a variety of audiences including chapter executive council officers, new and initiated members, volunteers and more. This education is delivered through a variety of methods including online lessons, in-person events, resource documents, virtual and in-person facilitation and more.
Fidelity for Initiated Members
Throughout the biennium, more than 65 online lessons were available for a variety of audiences. During this biennium, the Fidelity for Initiated Members shifted its programming model to a flexible course library that empowered chapters to engage with in-time learning that best addressed chapter needs. This flexible course library included courses on career development, anti-racism, microaggressions, eating disorders, civil discourse and more. A total of 30,216 users engaged in Fidelity courses in 2020-21.

Fidelity for New Members
During the biennium, Gamma Phi Beta adjusted our new member education program. The previous eight-week program delivery model was adapted to a four-week program delivery model. This adjustment was made to increase new member retention, create a unified model used by all collegiate chapters and to reduce opportunities for high-risk and/or hazing behaviors. This program adjustment resulted in an increase in new member retention from 89.5% to 94%.

Officer Resource Audit
Gamma Phi Beta provides a variety of technical documents to audiences including collegiate executive council officers, collegiate chairwomen, volunteers, alumnae and more. During the biennium, the Education department led a comprehensive audit of all technical documents provided to Gamma Phi Beta members. The officer resource audit process will now be conducted on a regular basis to increase resource accuracy and support offered to members through more than 300 digital resources.

REAL Leadership Events
One way that Gamma Phi Beta fulfills its commitment to build confident women of character is through REAL Leadership events. Historically, REAL Leadership programming included in-person leadership events designed to cultivate leadership skills among a variety of audiences including emerging chapter leaders, collegiate chapter executive council officers and Gamma Phi Beta volunteers. The COVID-19 pandemic paused Gamma Phi Beta’s ability to host in-person events during the biennium. In doing so, the inability to host traditional REAL Leadership events opened the door to reimagine how Gamma Phi Beta delivers its leadership education, resulting in a variety of new and innovative programs.

Belonging, Equity, Diversity and Inclusion Summit
The BEDI Summit was first hosted in February 2021 in response to international anti-racism activism in summer 2020. In its first year, the BEDI Summit was hosted as a one-day virtual event. The inaugural event hosted over 1,700 attendees. The 2021 BEDI Summit was also selected as the winner of the Association of Fraternity and Sorority Advisor’s (AFA) Excellence in Educational Programming award.

Hosted again in February 2022, the second BEDI Summit featured a two-day virtual event schedule. The 2022 summit hosted over 2,200 members of the Gamma Phi Beta community, making it the largest event in Sorority history.
REAL Leadership Retreat
In June 2021, Gamma Phi Beta hosted the first-ever REAL Leadership Retreat (RLR) in lieu of REAL Leadership Institute (RLI), which was canceled due to COVID-19. The retreat featured the State of Sorority speech, a keynote speaker, BEDI update and Q&A, eight breakout room options and a sisterhood event. More than 250 Gamma Phi Beta volunteers joined for the half-day virtual event. Gamma Phi Beta looks forward to resuming RLI in June 2023.

Executive Council Retreats
In November 2020, Gamma Phi Beta introduced a new program for officer education: Executive Council Retreats. This virtual program was designed to equip incoming executive council officers with the knowledge and skills necessary to successfully fulfill the responsibilities of their roles. The two years of combined Executive Council Retreat programming saw over 2,700 attendees. Additionally, over 97% of Executive Council Retreat survey respondents agreed or strongly agreed that Executive Council Retreat programming enabled them to utilize the skills and knowledge outlined in the program’s learning objectives, indicating this program is an effective way to deliver collegiate executive council education.

Panhellenic Affairs Department
The Panhellenic Affairs department educates all members of Gamma Phi Beta to appreciate and promote the values of the Panhellenic community. Autumn Hansen (Idaho) served as Gamma Phi Beta’s delegate to the National Panhellenic Conference (NPC) Council of Delegate and Sandy Biegelman Burba (Miami-Ohio) served as Gamma Phi Beta’s chief Panhellenic officer.

Additionally, our members served as NPC area advisors for College Panhellenics, release figure methodology specialists, the NPC advisory board, chairman on the NPC Foundation and as members of the college risk management pilot, the recruitment reform projects, the NPC diversity, equity and inclusion committee and on a special committee to advise the NPC audit and finance committee on their investments.

Since spring 2020, NPC has experienced several downward trends in recruitment which can be attributed to delayed or absence of recruitment due to COVID-19, the impact of anti-sorority activism and Gen Z students’ interest in recruitment. In 2020-2021 academic year, campuses experienced a 16.2% decrease in potential new members (PNM) signing up for recruitment. This contributed to a 13.3% decrease in PNM pledging during that same time.

Due to the downward trend of women participating in recruitment, Total was kept higher on most campuses than it naturally would have been if Panhellenic had reset total per the regular Total-setting methods. This ensured more chapters had the capacity to increase their chapter size with new members pledged through continuous open bidding (COB). Since fall 2020, NPC has continuously discussed how to best set Total in order to encourage growth in the community and address the organizations’ housing concerns.

In 2020, NPC added the promotion of the sorority experience policy which states all sorority women including collegians, alumnae, College Panhellenics, Alumnae Panhellenics, inter/national organizations and the National Panhellenic Conference should actively promote the overall sorority experience and membership opportunities in organizations. Prior to the addition of the promotion of the sorority experience policy,
collegian and alumnae contact was described in the positive Panhellenic contact policy (2003). These two policies outline the appropriate communication that can take place between a PNM, her parents/caregivers and members of NPC sororities.

During the biennium NPC provided webinars presented by the National Student Clearinghouse Research Center and Western Interstate Commission for Higher Education (WICHE) to keep members abreast of the changes in enrollment trends both at the high school and university level.

Through the years, Gamma Phi Beta has established several annual awards that provide support and recognition for collegians and college Panhellenics. Through the NPC Foundation, the Sorority and Gamma Phi Beta Foundation presented the Elizabeth Ahlemeyer Quick Panhellenic Woman Award scholarship to an involved Panhellenic woman regardless of her affiliation. The Gamma Phi Beta Foundation also awarded a scholarship to a Gamma Phi Beta who has displayed outstanding service in her college Panhellenic community.
Gamma Phi Beta’s Administration division is made up of our Human Resources, Office Operations and Technology departments, and includes volunteers for volunteer recruitment and onboarding. The Administration team also continues to support collegiate chapters through the processing of new members, managing badge and membership certificate ordering and managing general administration and customer service support.

**HUMAN RESOURCES DEPARTMENT**
The Human Resources (HR) department builds and leads workforce systems and programs to ensure Gamma Phi Beta is a great place to work and volunteer. Through the pandemic, this team continued to focus on designing and implementing processes that expand our workforce capacity to recruit, onboard and engage staff and volunteers. However, during this biennium, the work of HR was frequently affected by new COVID-19 protocols, compliance requirements and labor rulings to address and implement.

Gamma Phi Beta was not immune to the “turnover tsunami” that the rest of the United States experienced in 2021, which lead to an unprecedented 20 staff hires. The work done as a result of living through the pandemic also included a hiring freeze, instituting a furlough program for part of a year, processing pay cuts for some staff, adapting to working offsite and online via Teams and Zoom, continuously updating our Hybrid/Remote Work Policy and Work Plan Agreement, and pivoting to hire staff outside of Colorado, which now brings fully remote employees to one third of our staff.

In spite of the issues the pandemic added to the HR workload, much was still accomplished to support our workforce this biennium.

**Staff Recruitment, Onboarding and Retention**
- Successfully conducted our first fully remote onboarding experience and continue to offer high quality, fully remote onboarding experience to new employees
- Conducted over 100 interviews to hire 20 International Headquarters (IH) staff and Facility Management Company (FMC) facility directors
- Focused on fully incorporating the FMC facility directors into all employment practices
  - Improved their onboarding and updated the Facility Director Employee Handbook and job descriptions
  - Conducted the first monthly FMC facility director coffee and chat to increase inclusion with the facility directors and IH staff
  - Developed a performance management program and implemented performance goal setting and bi-weekly check-in processes
- Migrated to the new ADP TotalSource Workforce Now platform for a more robust and user-friendly employment management system
- Celebrated staff values awards and rolled out a new length of service awards program

**Volunteer Recruitment, Onboarding and Retention**
- Created an annual volunteer reflection and goal setting program and documented a volunteer conduct and feedback/removal process
- Updated volunteer recruitment and onboarding resources available on the website
- Collaborated with Marketing, Chapter Services, regional teams and HR specialists to improve volunteer recruitment efforts
Recruited and trained a full human resources specialist team and an onboarding specialist team and rebuilt the HR specialist volunteer role to be assigned regionally and work with regional teams for regional volunteer needs

Expanded volunteer onboarding opportunities: In fiscal year 2022, hosted 19 onboarding sessions to-date (and five more scheduled) with 112 attendees and fiscal year 2021 saw 16 sessions and 60 total attendees

Launched an updated assessment tool to evaluate the new volunteer onboarding experience, including multiple engagement points throughout their first 90 days

Incorporated BEDI filter in volunteer onboarding session

Updated Workforce News page with focus on volunteer recruiting and appreciation

Moved the HR Update to a bi-monthly publication and increased distribution to include members who volunteered in the last five years and recent young alumnae (targeted promotion to increase volunteer interest pipeline)

Partnered with volunteer team leaders to increase volunteer good standing and added a good standing check to the Jobvite application process

Partnered with the Member Experience division in the successful recruitment, screening and placement for open volunteer positions in the regional restructure

Celebrated and appreciated volunteers through annual Volunteer Appreciation Month each April

From fiscal year 2020 to the third quarter of fiscal year 2022, we have had:
- A 56% increase in volunteers participating in onboarding training sessions
- A 25% decrease in volunteer applications received
- A 10% decrease in volunteer interest forms received
- A 36% increase in individual volunteers selected to fill volunteer role (224 individual volunteers have been appointed in fiscal year 2022)

<table>
<thead>
<tr>
<th>Positions Posted</th>
<th>FY 2020</th>
<th>FY 2021</th>
<th>FY 2022 (as of 4/7/22)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Positions Filled</td>
<td>72</td>
<td>83</td>
<td>51</td>
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<tr>
<td>Advisors</td>
<td>37</td>
<td>34</td>
<td>29</td>
</tr>
<tr>
<td>Regional volunteers</td>
<td>16</td>
<td>29</td>
<td>10</td>
</tr>
<tr>
<td>Int’l volunteers</td>
<td>19</td>
<td>20</td>
<td>12</td>
</tr>
<tr>
<td>Open Positions</td>
<td>4</td>
<td>3</td>
<td>25</td>
</tr>
<tr>
<td>Advisors</td>
<td>2</td>
<td>3</td>
<td>12</td>
</tr>
<tr>
<td>Regional volunteers</td>
<td>1</td>
<td>0</td>
<td>9</td>
</tr>
<tr>
<td>Int’l volunteers</td>
<td>1</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>Applications Received</td>
<td>293</td>
<td>339</td>
<td>235</td>
</tr>
<tr>
<td>Volunteer Interest Forms Received</td>
<td>96</td>
<td>81</td>
<td>87</td>
</tr>
<tr>
<td>Onboarding Session Participants</td>
<td>49</td>
<td>66</td>
<td>112</td>
</tr>
</tbody>
</table>

* Some positions have many individual volunteers in those roles (i.e. collegiate chapter supervisors, committees)
OFFICE OPERATIONS DEPARTMENT
Due to the pandemic, the biennium began with the office remaining closed to the public and the majority of staff still working from home. Despite this, office operations continued to ensure the efficient and effective maintenance, upkeep and organization of our International Headquarters (IH) facility, landscape and grounds, equipment, chapter and new member supply order processing, mail processing, deliveries, inventory and vendors in and out of the building. In addition, as a result of evolving COVID protocols, we implemented daily wellness questionnaires for staff coming into the facility and maintained COVID compliance protocols and health order requirements for our staff.

Accomplishments to highlight in the maintenance of our IH facility during the 2020-22 biennium included conducting a facility system compliance and safety/security check, installing a new dialer board for our fire alarm system, managing minor roof repairs under the warranty process, organizing the basement and general office storage, setting up the phone system to address the needs of our remote workers, improving relationships with landscape and snow removal vendor, addressing damaged trees on the property, managing facility vendor contracts and arrangements due to lower staff usage of the building, supporting the Foundation with donor communications and processing, and adjusting procedures and process to effectively support a larger number of remote staff.

For the last half of the biennium, Colorado based staff are on a hybrid work schedule and come into the IH facility at least two days a week.

TECHNOLOGY DEPARTMENT
The Technology team is responsible for managing and maintaining the Sorority’s technology suite of software and hardware, ensuring optimal, relevant, and efficient IT operations, as well as accurate and timely member information, reporting and analytics for the Sorority and the Foundation.

This biennium highlighted our technology success in the digital world by having most of our employees’ time spent working at home these last two years. In 2020, we fully migrated to Microsoft SharePoint, as our web-based document management and file sharing and storage system, and as of fall 2021 our last server was officially retired, allowing our staff to now be fully functioning in the Microsoft cloud. For added security, a multi-factor authentication process was also implemented.

The Technology department continues to be an integral part of all divisions within One Gamma Phi Beta. We partnered with the Member Experience division to create an alumnae engagement scoring system, update Fidelity access and troubleshooting processes, improve the overall LMS integrations, improve Beta Base functionality and reporting to meet current chapter/member needs and implement the new regional restructuring within our member database, systems and reports. We partnered with the Events team to provide technical guidance and support for the BEDI Summit, virtual Founders Day and the registration launch of Convention and the REAL Leadership Experience. We collaborated with the Marketing and Communications team on new SQL views, the alumnae engagement scoring build and an updated member profile section on the website. Our work with the Foundation produced automation and online data collection for their donor stewardship program. This spring we teamed up with the Finance division to evaluate, implement and integrate updated accounting software. In January 2022, the Technology team once again began providing general IT training for all IH staff and facility directors.
Data management remains an important daily function of our technology efforts. To that end, regarding our membership database, iMIS, we launched an iMIS staff site as a user-friendly web portal for database access and added additional automated notifications for the new member badge ordering process and Initiation requirements. Hundreds of data reports and requests for statistical information are processed each year.

In 2021, the division had some staff turnover, which resulted in an update to the overall division. We moved away from a director of administration and formally created the Technology department which comprises a director of technology and applications, database administrator and IT manager (nonprofit data analyst). Previous administrative functions of this department are now within the general division and have been updated to serve as administrative support for all departments as needed, specifically for general customer service, events, volunteer human resources and Life Loyal processing.

Despite the staff transitions, the Technology team has stayed focused on computer and tech equipment needs for hybrid and fully remote employees and fortunately has not been hindered by the computer chip shortages and supply chain issues in the past two years.
Gamma Phi Beta Facilities Management Company Report
Over the past biennium, the Gamma Phi Beta Facilities Management Company (FMC) focused predominately on managing the challenges of the COVID-19 pandemic, revisiting the mission and vision of the FMC and on three strategic priorities.

In June 2021, the Board of Managers (BOM) evaluated the FMC’s mission and vision. This was done to ensure that the FMC is aligned with the priorities of One Gamma Phi Beta and committed to her members’ living and learning experiences within Gamma Phi Beta facilities. After review, the FMC adopted the following mission and vision statements.

**Mission**
To foster welcoming, inclusive spaces that promote sisterhood by providing innovative, industry-leading properties and asset management services for Gamma Phi Beta and her members.

**Vision**
For collegiate Gamma Phi Betas to have access to living, learning or gathering spaces that foster community and belonging.

Following the spirit and inspiration of these new guardrails, the FMC focused intently on maintaining facilities for members to gradually return to campus in the wake of the pandemic. The FMC responded to the ever-evolving changes to campus and local policies, while ensuring members had a safe and accessible place to gather.

Staff, volunteers and members felt the impact of COVID-19. The FMC worked alongside universities, local health departments and vendors to navigate the operations of the facilities. With the primary concern being the health and wellness of the residents in the facilities, the FMC made modifications to operations, finances and facility usage in the following ways:

- Temporarily reduced occupancy in the facilities
- Closed a facility in 2020 that had a sleeping porch that could not accommodate social distancing
- Allowed members to be released from housing contracts in fall 2020 for COVID concerns
- Worked with universities and local health departments to manage quarantines
- Temporarily reduced common area fees
- Increased frequency of cleaning throughout facilities
- Modified move-in and move-out practices
- Limited access to the facilities of non-resident guests
- Mandated masks in the facilities

In addition to the challenges of the pandemic, the FMC focused on three priorities for the biennium: financial and operational strength, relevant and adaptable chapter facilities and collaborative and coordinated decision-making and implementation. In the current local and global environment, new goals and focus were added to these priorities to maintain the relevancy of the FMC and its survival through the many stages of COVID.
PORTFOLIO OF WORK
There is no better place to see the results of the strategic priorities than with Gamma Phi Beta’s move to in-house property management. This decision, made three years ago, gave FMC staff direct oversight of the day-to-day operations of the properties, billing and collecting, capital project planning and new initiatives.

The FMC currently owns, manages and supports 64 chapters, which equates to 47% of Gamma Phi Beta chapters. There are 29 chapters within the FMC that have facilities: 14 free standing facilities, eight dorms and two rooms. The FMC also provides financial services to four AHCs. The FMC houses 813 members — 23% of Gamma Phi Beta’s 3,544 members living in our facilities.

We are proud of the following major projects that occurred during the biennium:
- Beta (Michigan) – Common area furnishings, outside furnishings, water heater and boiler replacement
- Beta Delta (Michigan State) – Common area furnishings to formal living room, chapter room and study
- Beta Mu (Florida State) – Wifi access points upgrades, air conditioning replacements and renovation to foyer
- Delta Psi (California-Santa Barbara) – Wifi upgrade with new access points and wiring and furniture replacements in apartments
- Gamma Chi (Texas State-San Marcos) – Wifi access points upgrade and common area furnishings
- Gamma Omicron (Kentucky) – Wifi upgrades, new mattresses, wallpaper update, new carpet on residence floors and patio furniture
- Epsilon Theta (Clemson) – Kitchen and living room updates

The FMC also continues to prioritize the support of Affiliated House Corporations (AHC) by providing advice and answering questions about contracts, employment issues, governing documents, resident situations and various other issues that AHCs face during the year.

GROWTH
While the pandemic slowed the FMC’s ability to grow via collegiate extension, we are very proud to have added our Gamma Omicron facility at the University of Kentucky to our portfolio. This addition allowed us to reengage many Gamma Omicron alumnae in the furnishing of this new facility and bring pride to this reinstalled chapter.

The FMC was also happy to grow by merging with three AHCs during the biennium. We are excited to welcome Beta Lambda (San Diego State), Beta Sigma (Washington State) and Delta Pi (Illinois State) to the FMC portfolio.

THE FUTURE OF THE FMC
The FMC is looking forward to the next biennium where we will continue to evaluate our facilities and options for chapters while making decisions that are best for members and One Gamma Phi Beta.
In fall 2022, we look forward to moving the Beta Xi (Ohio State) and Eta Omicron (Ohio University) into new facilities and selling the Zeta Alpha (Eastern Washington) facility, which will allow us to pursue alternative options for the chapter.

FINANCIAL STATE OF THE FMC
The Board of Managers spends a large part of every meeting discussing the organization’s current financial picture, while evaluating opportunities for growth. The ongoing reduction of facility occupancy continues to impact the FMC’s revenue in fiscal year 2022. Expenditures such as utilities, supplies and repairs and maintenance are outpacing revenue. The FMC continues to tightly monitor expenses to ensure compliance with existing debt covenants. The FMC prioritized investment in all FMC facilities and will spend just under $500,000 in capital improvements during this fiscal year.

Sincerely,
Facilities Management Company Board of Managers 2020-2022

![Graph showing financial performance of Gamma Phi Beta Facilities Management Company as of February 28, 2022. The graph compares YTD actual expenses, annual budget expenses, and net income from operations.]
A Vision for our Future

Gamma Phi Beta Facilities Management Company’s strategic plan for fiscal years 2021-24

THREE PRIORITIES FOR FY21 and FY22

1. Financial and Operational Strength
2. Relevant and Adaptable Chapter Facilities*
3. Collaborative and Coordinated Decision-Making Implementation*

Our shared practical vision includes

- Financial and Operational Strength*
- Relevant and Adaptable Chapter Facilities*
- Recognized Expertise in Property Management
- Collaborative and Trustworthy Enterprise Leadership
- Cooperative Portfolio Growth
- Strong and Recognized Brand
- Collaborative and Coordinated Decision-Making Implementation*
- Integrated Technology Solutions

Gamma Phi Beta’s Fiscal Year (FY) begins August 1 and goes through July 31 annually.

This strategic plan is for August 1, 2020, through July 31, 2024.

*Denotes a priority for FY21 and FY22.
Gamma Phi Beta Foundation Report
The Gamma Phi Beta Foundation’s Board of Trustees has spent the biennium building and growing the Foundation. We are pleased to provide a report of our achievements for 2020-22, including a revision of our mission statement:

**Mission**

We are sisters helping sisters financially sustain and advance the mission of Gamma Phi Beta. Through successful fundraising and stewardship, we support Gamma Phi Beta and her members who have scholarship, leadership, philanthropic and emergency needs.

**Vision**

To inspire every member to make Gamma Phi Beta a priority philanthropic cause, empowering all sisters to make a difference in the world, now and in the future.

The Board of Trustees has invested time and resources to ensuring that we are as transparent as possible. While there is always room for improvement, we hope that by adopting the Donor Bill of Rights, we will inspire confidence in our donors and supporters that we are upholding our fiduciary responsibility to always steward our resources in a way that represents the donor’s intent. The Foundation hired its first chief development officer who is leading targeted fundraising programs like the first Giving Day which raised more than $160,000 in 24 hours – when we called, Gamma Phi Beta sisters answered! Thank you!

The Foundation is also gearing up for the 150th Anniversary Celebration in 2024. Not only have we established our goals for the 150th but we have also approved development of a plan to raise funds for the digitization of the history of Gamma Phi Beta.

**STRATEGIC OUTLOOK**

In this biennium the Foundation continued to work on our five-year strategic plan which was developed in 2020. The last two years, the Board, volunteers and staff have focused on three strategic priorities: building and maintaining a consistent, robust and sustainable financial position, building and maintaining a strong and clear brand presence and creating meaningful lifetime donor engagement.

**BUILD AND MAINTAIN A CONSISTENT ROBUST AND SUSTAINABLE FINANCIAL POSITION**

In these rapidly changing times, it is critical for the Foundation to be able to change gears and answer the most immediate needs of our membership. To that end, the Foundation has been working to build unrestricted annual support by 20% by July 31, 2022, and to continue growing this support by 5% annually in subsequent fiscal years. We are happy to report that we are on track to exceed this goal. Thank you to our many generous donors who made gifts of all sizes to help make this possible.

At the same time, the Foundation has been working to engage and retain a larger donor base. Again, sisters have answered this call. We have welcomed over 500 new donors and had nearly 6,000 total donors this biennium.

In addition to building new gifts, the Foundation has been working hard to be good stewards of gifts already made. The Foundation has continued to work with Alliance Bernstein to manage our investment portfolio to maximize growth while providing revenue to support Gamma Phi Beta members with scholarships, fellowships and leadership grants. While we have experienced positive investment returns during this volatile market, the Trustees have also been conservative with our spending to ensure we continue to improve our financial position.
BUILD AND MAINTAIN A STRONG AND CLEAR BRAND PRESENCE
As we continue to embrace the symbols, mission and vision our four Founders defined, we also know Gamma Phi Beta has grown exponentially since our founding 148 years ago. To stay true and constant to our sisterhood, the Foundation has updated our mission and vision. As the sole organization that supports Gamma Phi Beta, we wanted a mission that reflected our position to help our members.

As part of the effort to clearly define the Foundation and its role within One Gamma Phi Beta, the philanthropic focus and Girls on the Run relationship has transitioned to Foundation oversight. We hired a new philanthropy manager to help support chapters with Moonball and other philanthropy events and to support our scholarship and fellowship process.

CREATE MEANINGFUL LIFETIME DONOR ENGAGEMENT
Donors to the Gamma Phi Beta Foundation are investing in the future of every sister. To help create a culture of philanthropy and recognition for every donor, regardless of donation size, the Foundation has developed a stewardship committee that will focus solely on lifetime donor engagement. Further, to recognize the commitment of donors who have given generously for many years, the Foundation announced a new lifetime giving recognition program.

- **The Syracuse Order**
  Lifetime unrestricted gift of $1,000,000 or more

- **The Mary A. Bingham Order**
  Lifetime unrestricted gift of $250,000-$999,999

- **The E. Adeline Curtis Order**
  Lifetime unrestricted gift of $100,000 - $240,000

- **The Frances E. Haven Order**
  Lifetime unrestricted gift of $50,000 - $99,000

- **The Helen M. Dodge Order**
  Lifetime unrestricted gift of $25,000 - $49,000

- **The Clara Worden Order**
  Lifetime unrestricted gift of $10,000 - $24,999
FINANCIAL STATE OF THE FOUNDATION

The Foundation is expected to meet their unrestricted revenue goals this year. Through the end of February, overall revenue has exceeded the budget due to unexpected and planned giving and endowment gifts. Expenses will end the year under budget estimates due to shared staffing vacancies.

![Financial State of the Foundation Chart]

- Revenue: $1,200,000 (YTD Actual)
- Expenses: $600,000 (YTD Actual)
- Net Income from Operations: $600,000 (YTD Actual)
A Vision for our Future

Gamma Phi Beta Foundation’s strategic plan for fiscal years 2021-24

THREE PRIORITIES FOR FY21 and FY22

1. Consistent, Robust and Sustainable Financial Position
2. Strong and Clear Brand Presence
3. Meaningful Lifetime Donor Engagement

Our shared practical vision includes:

- Consistent, Robust and Sustainable Financial Position*
- Expanded Volunteer Recruitment and Opportunities
- Comprehensive Framework for Fundraising Success
- Demonstrated Commitment to Belonging and Inclusion
- Strong and Clear Brand Presence*
- A Vibrant 150th Fundraising Campaign
- Meaningful Lifetime Donor Engagement*
- Sisters Supporting Sisters
- Intentional, Effective and Agile Organizational Design

Gamma Phi Beta’s Fiscal Year (FY) begins August 1 and goes through July 31 annually.

This strategic plan is for August 1, 2020, through July 31, 2024.

*Denotes a priority for FY21 and FY22.
Report of Action Addressing Resolutions Adopted at Convention 2020
RESOLUTION 2020-I
Reviewed and approved by 2020-22 Nominating Committee on August 31, 2021
Submitted to International Council, November 2021

Whereas, Many nonprofit boards of directors use staggered terms to ensure that all members are not leaving in the same year;

Whereas, Continuity of institutional history can be maintained by establishing International Council (IC) terms which end at different times; and

Whereas, Part of the nominating committee’s function and responsibilities is to be aware of the areas most needed by IC (financial, legislative, diversity, higher education, etc.) and issues facing the Sorority, so that key strengths and skills of members can be developed to meet current needs and those projected in the upcoming biennium even with staggered terms;

Resolved, That International Council appoint a task force to study staggered terms of International Council.

Research performed:
• BoardSource: “Term Limits: Thumbs Up? Thumbs Down?”
• “Best Practices for Nonprofit Board Term Limits” by Nick Price
• Conversation with Bob Spinks, professor of nonprofit management at Oklahoma City University referred by Mary Jo Silsby
  o Bob Spinks is director of the Master of Arts program in applied sociology emphasizing nonprofit leadership at Oklahoma City University.
  o Prior to that role, he was the president and chief executive officer of the United Way of Central Oklahoma and executive director of the Community Council of Central Oklahoma, the regional research and planning organization for the nonprofit community.
  o He serves on the boards of many nonprofit and educational organizations in Oklahoma and has served as an adjunct professor at Oklahoma Christian University, Oklahoma State University and Southeastern Oklahoma State University.
• Conversation between Tanya Jordan and Dawn Reese
  o Dawn Reese was suggested as an expert in nonprofit boards by Cinda Lucas and Linda Babcock. Dawn is currently the chief executive officer of the nonprofit, The Wooden Floor, and has over 25 years in the industry. She also serves as a board member for other nonprofit organizations.
• Conversation with resolution writers, Cinda Lucas and Linda Babcock

Current IC Term Limits
• Two-year terms for all
• Vice Presidents limited to three consecutive terms
• International President limited to two consecutive terms and 10 consecutive years of International Council service
Staggered Terms

Pros
• Provides good balance of continuity and turnover
• Maintains institutional memory
• Encourages balance of responsibility for institutional memory between staff and IC
• Allows for invigorating new members and new ideas from IC to IC
• Allows for targeting expertise needs to each biennium
• Allows for board diversification
• Allows for rotation of committee assignments

Cons
• Potential loss of institutional memory and increased reliance on staff when entire board turns over
• Resistance to a shift to staggered terms

Recommendation Considerations
• Most research is based on large boards (20+ members) that generally operate with an executive committee
• Typically, Gamma Phi Beta has operated with some natural staggering of terms. Will this change in the board governance model?
• Need to consider board orientation and training
• Need to consider developing board cohesiveness

RECOMMENDATION
The Nominating Committee proposes the following addition as #2 to the Other Provisions section of the Nominating Committee Expectations and Guidelines:

2. When the nominating committee forms the slate for the International Council, it is recommended that consideration be given to slating a mixture of returning and new board members each biennium. Ideally, this mixture would promote a good balance of continuity and turnover; support the maintenance and sharing of institutional memory between the board and staff; increase board diversity; achieve the expertise needed for each biennium; encourage a rotation of committee assignments for board members; and invigorate the board with new ideas and experiences.

Subcommittee members:
Linda Johnson
Tanya Jordan
Alexa Bell
Amy Geist
RESOLUTION 2020-2  
Submitted by Tara Foristal, Chief Marketing Officer  
Updated: December 2021

Whereas, Timely news of the Sorority is important to our members;

Whereas, Our members are interested in keeping abreast of volunteer appointments, knowing of the passing of well-known alumnae members, in being aware of open volunteer positions in a timely manner, and Sorority and Foundation news etc.;

Whereas, In today’s world there are many methods of communication which allow us to deliver news in a rapid fashion; and

Whereas, When members see direct communication coming from its headquarters and leaders, members will be more engaged and committed to the organization;

Resolved, That International Council appoint a committee to explore the use of multiple methods of communication, including social media, the Sorority website and email announcements so that as many members as possible can learn of Sorority news in a timely manner.

RESOLUTION STAFF SUMMARY
Below is a summary of how the Marketing and Communications division currently keeps members informed regarding the areas addressed in the resolution.

• Volunteer appointments
  o Board-level service is announced via press release, email and social media.
  o Many high-level strategic volunteer positions are announced via One Gamma Phi Beta emails and social media.
  o Committee-appointed positions can be found on the Committees page of the Gamma Phi Beta website.
  o All other workforce members can be found via Beta Base.

• Passing of well-known alumnae members
  o When a prominent* Gamma Phi Beta passes, the Marketing team will produce a press release, include the release in relevant email publications, post on social media and may also include a longer article in an issue of The Crescent (*prominent is subjective).
  o Acknowledgment of all known passing members are displayed quarterly in The Crescent and at Convention in the Memorial Program.

• Open Volunteer Positions
  o Open volunteer positions are posted on the Volunteer page of the Gamma Phi Beta website.
  o Many volunteer positions (not all) are posted to LinkedIn.

• General Sorority and Foundation News
  o Alumnae Digest
  o HR Update
  o One Gamma Phi Beta
  o All Member Emails
RESOLUTION UPDATE APRIL 2021
On March 8, 2021, a meeting was held with the following participants: Tara Foristal (chief marketing officer), Megan Wick (executive director), Teresa Tisserat (director of marketing), Megan Byrne Krueger (Chicago Alumnae Chapter) and Teri Lombardo Ramirez (Balboa Harbor Alumnae Chapter).

The group met to discuss greater detail surrounding the resolution, provide clarification as to what communications are currently addressing the resolution and to determine actionable improvements.

The group determined the following actionable improvements. Additional action items may be determined at a later date:

- Hyperlink open volunteer positions in more ongoing electronic newsletters – specifically in the Alumnae Digest and HR Update.
- Make volunteer positions more prominent on the Gamma Phi Beta website.
- Include information on how to look up members (collegian/alumnae/deceased) in The Crescent.

DECEMBER 2021 UPDATE
The following was completed since April 2021:

- Eleven (11) posts were made in the 2021 fiscal year on LinkedIn for volunteer positions.
- Volunteer positions were also advertised on the Gamma Phi Beta homepage throughout the year.
- A link was added to Facebook “About Us” for open volunteer positions.
- Volunteer opportunities will be added to the January 2022 Foundation Newsletter.
- The Crescent will include permanent instructions on how to find a member via the Gamma Phi Beta website.
RESOLUTION 2020-3
Submitted by the Governance and Personnel Committee

Whereas, Membership in the Sorority is classified as collegiate and alumnae members;

Whereas, Article VI, Section 1 a. (3) of the Sorority bylaws states eligibility for the Nominating Committee shall be open to any alumna member in good standing except for those concurrently serving on International Council or members who are paid employees of the Sorority, Facilities Management Company or Foundation;

Whereas, Staff supports International Council, the volunteers and all committees except the Nominating Committee; and

Whereas, Paid staff bring real value to the organization, avoiding potential conflicts of interest are important;

Resolved, That International Council examine the need for any further limitations that may apply to all staff members and specifically apply to staff who are members of Gamma Phi Beta.

Further conversation was held with Resolution 2020-3 authors to seek clarification about the problem being identified. After meeting, it was determined the concern lies in professional staff’s participation in the Nominating Committee process. Specifically, the ability for professional staff to submit suggestions for candidates or provide feedback on candidates with whom they have worked.

The Nominating Committee is an elected body of members only who evaluate candidates for elected office using a variety of means, including self assessment, essay questions, comment forms, work experiences, volunteer experiences, member competencies and interviews. One part of the candidate evaluation process is the consideration of comment forms who can be submitted by members or nonmembers.

In the current election cycle, the Nominating Committee recommended one of the three required candidate comment forms be from someone outside of Gamma Phi Beta, presumably a nonmember.

Some members believe that professional staff members should not involve themselves in the Nominating Committee process due to a perceived conflict of interest. In a leadership model of strategic governance, professional staff members are the managing supervisors of volunteers and volunteer teams and, therefore, have great insight into volunteer work performance, team contributions, strengths and opportunities for growth. It would be short sighted to limit their input in the Nominating Committee process as a volunteer’s performance is a key indicator of future success in elected service, whether on the Nominating Committee or International Council.

The concern of staff participation in the Nominating Committee process is rooted in the inherent conflict of interest that might exist if a staff person is weighing in on who might be their future supervisor. It is important to note that conflicts of interest in the nonprofit setting are not to be eliminated but rather acknowledged and
managed. In this case, a staff person’s conflict of interest would be managed if, when submitting feedback on a candidate for International Council or the Nominating Committee, they denote their role as a member of International Headquarters staff. It is then up to the Nominating Committee to discern how this feedback will inform their slating process.

If we continue to explore the challenges that exist with conflicts of interest it would be a necessary next step to say that all members of the Nominating Committee have conflicts of interest when they have personal relationships with candidates. It would be impossible and inane to attempt to limit those relationships because we are a sisterhood that is founded on relationships. Again, the collective team would be accountable to one another in acknowledging and managing any conflicts of interest individual committee members might have in a given biennium.

The only supervisory relationship that exists is that between the International President and the executive director. While the rest of International Council provides feedback on the executive director’s performance, the International President (in partnership with the Governance and Personnel Committee) is the boss.

Nonprofit governance best practice encourages the involvement of the executive director in discussions about potential candidates for board-level service. Additionally, best practice encourages solicitation of candidate feedback from those who have worked directly with the individual. Ultimately, it is the Nominating Committee who presents a recommended slate of candidates to the voting body after careful deliberation and consideration.

We believe the Nominating Committee, a members-only body, can be trusted to discern the nuances of candidate feedback in the context of the political and relational influences the commentor may have in Gamma Phi Beta. As an organization that values Belonging, Equity, Diversity, and Inclusion, it would be contrary to restrict staff members’ participation in a process that already involves nonmembers when they have first-hand knowledge of these candidates and a vested interest in an effective team of leaders for the organization.
RESOLUTION 2020-4
Submitted by the Governance and Personnel Committee

Resolved, That International Council (IC) explore inviting both the Chief Panhellenic Officer (CPO) and the Council of Delegates (COD) to attend all IC meetings, conference calls or virtual meetings in their entirety in order to stay informed and knowledgeable about all Gamma Phi Beta Sorority details pertaining to any business conducted by the National Panhellenic Conference (NPC) and be able to share Gamma Phi Beta positions on NPC questions and issues;

Resolved, That IC consider requesting CPO and COD provide regular reports regarding trends on campuses to prepare the Sorority for changes within the interfraternal community; and

Resolved, That IC investigate a 2022 bylaw amendment which stipulates that the CPO be an ex-officio member of IC.

NPC Resolution Response
As Gamma Phi Beta volunteer structures and positions have changed through the years, it would make sense there are opportunities for clarification on how we currently interface with NPC. Resolution #2020-4 includes assumptions about the current structure of the National Panhellenic Conference (NPC) that are no longer accurate.

Throughout the years, the role of NPC delegate has been elected or appointed, on International Council (IC) or not. In July 2019, the member organizations of the NPC enacted a new model of strategic governance. Part of this change included the designation by each member group of a representative to the Council of Delegates. Similar to Gamma Phi Beta, NPC found having a board leading operational work of the organization was prohibiting participation and cumbersome. Furthermore, international and national presidents were becoming increasingly involved in NPC discussions and dialogue creating some ambiguity between the role of the presidents and the NPC delegates in the NPC. The new model of representation allows each member group to determine who will be their designee to the NPC Council of Delegates.

In 2018, International Council made the decision that the Sorority’s International President would represent Gamma Phi Beta to the NPC Council of Delegates. The vote read as follows:

International Council Motion #047. “International Council appoints the Sorority’s International President to serve as the Gamma Phi Beta representative to the NPC Council of Delegates. In the event the International President is unable to attend a Council of Delegates meeting, the International Council Vice Chairwoman shall serve as the Gamma Phi Beta representative to the NPC Council of Delegates.”

Gamma Phi Beta decided at that time the International President would serve as the organization’s representative. This decision was a reflection of our own organization’s strategic governance leadership model change wherein members of International Council were relieved of operational duties to ensure (1) members of International Council were able to lead Gamma Phi Beta in consideration of the whole, rather than through lenses of department agendas and (2) to make the volunteer experience of International Council members more manageable and increase the number of sisters who would consider service at the elected level.
International presidents have always been part of conversations regarding NPC legislation, campus trends, and college Panhellenic issues. There continues to be robust discussion and meaningful relationships among the NPC member group’s international and national presidents.

Per International Council’s Guidelines and Expectations, the Chief Panhellenic Officer is invited to all discussions on NPC-related matters. The document reads:

“The Chief Panhellenic Officer shall be invited to participate in International Council meetings and conference calls for the following items: a. All extension and sorority growth discussions b. All discussions related to challenged chapters or University issues c. All Policy, Position Statement, Bylaws and Rules and Procedures discussions. d. All government relations discussions.”

In practice, the international president partners regularly with the Chief Panhellenic Officer as a subject matter expert. The Chief Panhellenic Officer serves as the point of contact for collegiate chapters in their campus Panhellenic operations and also serves as Gamma Phi Beta’s primary point of communication distribution for NPC.

The Chief Panhellenic Officer is an appointed volunteer who coordinates the operational work and support of Gamma Phi Beta’s collegiate and alumnae Panhellenic volunteers. Naming her as an ex officio member of International Council would be contrary to the decision by Gamma Phi Beta to adopt a model where members of International Council are unencumbered from organizational operations and lead Gamma Phi Beta with the whole of the organization in mind, rather than a division to which they are beholden. Additionally, naming her as an ex officio member of International Council would require her to attend all IC meetings. We must continue to prioritize the evaluation and expectation that volunteering within Gamma Phi Beta is manageable so as not to create barriers for those interested in service.

As a result of Resolution 2020-4, International Council will invite the Chief Panhellenic Officer to provide quarterly updates at International Council meetings. Additionally, it is important to note that the International President serving as Gamma Phi Beta’s delegate to the NPC Council of Delegates is a new practice that would benefit from evaluation after some time has been devoted to this model. In the past biennium, a new standing meeting was incorporated for the NPC delegate (Gamma Phi Beta’s International President), the Chief Panhellenic Officer, and the chief experience officer. At this point in time, we feel this is sufficient in ensuring NPC issues are part of International Council operations, discussions and strategies and will not proceed with the suggestion to propose legislation making the Chief Panhellenic Officer an ex officio member of International Council.
RESOLUTION 2020-5
Submitted by: Samantha Keltner, Chief Experience Officer and Dexter Bush-Scott, Director of Collegiate Experience
International Council Meeting: December 2021

Background
Convention Resolution 2020-5 pertains to affordability of membership, with specific considerations for (1) the financial impact of the COVID-19 pandemic, (2) the ability to be more inclusive in recruitment of new members and retention of current members and (3) the ability to share corporate financial information with the membership.

Specifically, the resolution states:

Resolved, That International Council explore means of reducing financial obligations at the international level for chapters, new members and members for the 2020-21 year;

Resolved, That International Council explore options for the future to lower financial obligations in general to retain members and to recruit potential new members in an inclusive manner; and

Resolved, That International Council investigate ways to share corporate financials with our members and explore a means of expressing a value-based explanation of international dues.

Reduction of Financial Obligations for 2020-21
While the Sorority did not reduce international member dues or international new member fees, the Sorority did reduce financial obligations at the international level for chapters, new members and members for the 2020-21 academic year in the following ways.

Liability insurance was reduced from $45 per member to $35 per member, resulting in a decrease of $10 per member in the 2020-21 academic year.

Beginning in summer 2020, Gamma Phi Beta made the decisions to cancel in-person Sorority events or transition them to virtual platforms due to the COVID-19 pandemic. The cost reductions allowed chapters to save additional money in their chapter budgets. The chart below outlines average chapter cost savings during the 2020-21 academic year.
### Report of Action Addressing Resolutions Adopted at Convention 2020

<table>
<thead>
<tr>
<th>Item</th>
<th>Recommended Budgeted Amount</th>
<th>Actual Amount Spent</th>
<th>Savings in Dollars</th>
<th>Savings by Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>REAL Leadership Experience (Summer 2020)</td>
<td>$550</td>
<td>$0</td>
<td>$550</td>
<td>100%</td>
</tr>
<tr>
<td>Convention (Summer 2020)</td>
<td>$5,622 (3 attendees)</td>
<td>$200 (2 attendees)</td>
<td>$5,422</td>
<td>96%</td>
</tr>
<tr>
<td>RLC/BEDI Summit</td>
<td>$8,400 (8 attendees)</td>
<td>$400 (10 attendees)</td>
<td>$8,000</td>
<td>95%</td>
</tr>
<tr>
<td>CLC and Volunteer Visits</td>
<td>$500</td>
<td>$0</td>
<td>$500</td>
<td>100%</td>
</tr>
<tr>
<td>REAL Leadership Experience (Summer 2021)</td>
<td>$550</td>
<td>$0</td>
<td>$550</td>
<td>100%</td>
</tr>
<tr>
<td>REAL Leadership Institute (Summer 2021)</td>
<td>$950</td>
<td>$0</td>
<td>$950</td>
<td>100%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$16,522</strong></td>
<td><strong>$600</strong></td>
<td><strong>$15,922</strong></td>
<td><strong>96%</strong></td>
</tr>
</tbody>
</table>

Additionally, the Sorority made the decision to forgo in-person REAL Leadership events again in the 2021-22 academic year, resulting in a similar cost savings for chapters.

Finally, a bylaw amendment was recommended to eliminate the statement of specific fee amounts in the international bylaws. This amendment would provide International Council more flexibility to adjust international dues and fees should a similar situation arise in the future.

**Explore Options for Future to Lower Financial Obligations**

To begin exploring options for reducing financial obligations in the future, we benchmarked Gamma Phi Beta’s international dues and fees with 25 other National Panhellenic Conference (NPC) groups.

Of the 26 NPC groups, the range for inter/national new member fees is $411 to $140 per person. The average inter/national new member fee is $217. Currently, Gamma Phi Beta ranks 24th with a new member fee of $150.

Of the 26 NPC groups, the range for inter/national initiated collegiate member dues is $235 to $37 per person annually. The average inter/national initiated collegiate member dues are $141. Currently, Gamma Phi Beta ranks 15th with collegiate member dues of $120.

Benchmarking with other NPC groups suggests that Gamma Phi Beta’s international new member fee is very competitive among our peers and that Gamma Phi Beta’s initiated collegiate member dues are competitive among our peers.

This information suggests that it may be important to consider monies received outside of international dues and fees, such as event registration costs and the expenses associated with volunteer and CLC visits to chapters as a way to reduce expenses that chapters pay to the international organization.
Additionally, the proposed bylaw amendment will allow International Council flexibility to adjust initiated and new member dues should we find in the future that these fees are no longer competitive.

**Investigate Ways to Share Corporate Financials**

In August 2020, Gamma Phi Beta began publicly sharing corporate financials on the Our Commitment to Transparency webpage. This webpage also shares past Convention reports which include additional financial reporting.

In conjunction with our chief financial officer, we developed an infographic that can be easily shared with new members and members about how international dues and fees are used. This infographic became available to members on the website and in new member materials beginning summer 2021.
RESOLUTION 2020-6  
*Submitted by Fraya Lynn Black, Lynnette Phillips, Kelsi Wall, Allison McMurray and Page Adams*

**Introduction**  
Resolution 2020-6 was entered into effect at 2020 Virtual Convention, and the 2020-22 International Council directed the resolution to the Belonging and Inclusion Committee as a priority initiative. The Belonging and Inclusion Committee created a targeted subcommittee composed of committee members and Sorority staff to perform research, facilitate discussion and develop recommendations to address Resolution 2020-6.

**Resolution**

> Whereas, Gamma Phi Beta Convention serves as the venue to conduct Sorority business each biennium;

> Whereas, Gamma Phi Beta Convention also serves as an avenue for members to build affinity for the organization through participation;

> Whereas, Affinity is further developed through the opportunity to meet new sisters and engage in developing sisterhood;

> Whereas, Gamma Phi Beta Convention provides the opportunity for unique and timely educational programming for members of all membership types;

> Whereas, Gamma Phi Beta Convention is inaccessible to many members due to the financial, home and work obligations;

> Whereas, Gamma Phi Beta created a Belong and Inclusion Taskforce which provided recommendations to increase equity within the Sorority;

> Whereas, The work will be continued through the implementation of a Belonging and Inclusion Committee demonstrating Gamma Phi Beta’s commitment to equitable practices within the organization; and

> Whereas, The global pandemic cause by COVID-19 provided the opportunity to pilot a virtual Convention experience;

> Resolved, That International Council appoint a committee to study equity in Convention access for future Conventions including the utilization of tiered registration, virtual participation in addition to in-person attendance, different meal plans and attendance opportunities;

> Resolved, That the committee study meaningful engagement opportunities for all attendees and study the creation of mentorships and connection opportunities for all first-time attendees no matter the attendance format; and

> Resolved, That the study includes increased means of virtual participation in the Business Session.
RESOLUTION COMPONENTS

Utilization of Tiered Registration
In some respects, tiered registration is already an option for attendance at Convention with options provided for delegates (full registration required), as well as the option to purchase attendance to Convention events a la carte (such as the welcome dinner, awards meal, Confirmed Conventioneers dinner, Pink Carnation banquet, etc.) or choosing to attend only some of the days. These options allow flexibility for members to attend portions of Convention that are more sisterhood-focused, while keeping costs lower, while also enabling the planning of Convention from a logistical perspective.

Introducing virtual participation would necessitate an additional tier of registration. Registration costs would still be required to offset some of the additional production expenses associated with enabling virtual participation, which are significant (estimated to be double cost). However, this would allow for participation in a cost-effective manner without necessitating travel and accommodation costs. Options could also be provided to add on the purchase of Convention materials (programs, bags, hats, etc.) for virtual participants.

Additionally, consideration should be given to allowing alumnae and collegiate chapters to purchase a virtual attendance package for their members. This would promote sisterhood and likely engage even more members in Convention proceedings by allowing chapters to participate as a group.

Virtual Participation in Addition to In-person Attendance
Offering a virtual attendance option in addition to in-person attendance could provide a more inclusive Convention experience. A discounted price for virtual attendance would allow those who are unable to pay for travel expenses to attend and potentially allow more collegiate attendance. In addition to participation in virtual business sessions and keynote speakers, virtual attendees could receive a box with materials that enhance their connection to Convention. The impact on staffing, planning, production and finances is significant in creating virtual participation and should be considered.

Meal Plan Options
Gamma Phi Beta has implemented options to purchase some or all of the evening meals, to enable affordability and flexibility. Additionally, food allergies and dietary restrictions are accommodated, and members with specific requests can identify them during the registration process. For example, members can indicate the need for gluten free, vegetarian, nut free, kosher style and other type meals.

Attendance
The Convention target audience includes collegiate and alumnae chapter delegates, advisors, Affiliated House Corporation board leaders and members who want to connect to the Sorority in meaningful ways are all welcome.

In regard to collegiate chapters, Gamma Phi Beta is encouraging collegiate chapters to send one delegate, one alternate and one advisor to Convention. Due to 1) the purpose of Convention is to conduct business pertaining to the general operation of the Sorority and to elect officers, 2) Convention learning workshops have been eliminated (for the time being) and 3) other educational opportunities are being provided to chapter leadership (e.g., virtual executive council retreats). Gamma Phi Beta is no longer encouraging a seven-person executive board to attend, which results in chapter budget savings.
Meaningful Engagement Opportunities for All Attendees
The bi-annual Convention provides our membership the opportunity to connect and grow the sisterhood. While much of the dedicated agenda will serve the purpose of advancing the Sorority through business sessions, there is the need and desire of the membership to drive meaningful engagement for all attendees.

Existing practices such as badges and volunteer recognition shall remain an integral part of engagement. Moving forward, the considered technological component would allow for gamification and connection based on interests prior to Convention, which invite opportunities to educate, excite and engage the membership. The creation of a social media lounge with the intention to drive networking and requests/invites based on attendees’ interests and preferred platforms such as LinkedIn, Instagram or Facebook would support connections post-Convention.

The opportunity for meaningful engagement via panel discussions and breakout sessions for the relevant topics of collegians and volunteer workforce could be considered for future conventions (post 2024). This includes but is not limited to relocation moves, career/job search and joining the volunteer workforce as alumnae post-collegiate experience. Many of these conversations happen in subgroups via social media but would be beneficial in the in-person format of Convention.

Creation of Mentorships and Connection Opportunities for all First-time Attendees
The first-time attendee experience allows members to grow their business acumen of the Sorority, create awareness for opportunities within the organization and develop new connections with members of the sisterhood. It is an opportunity to plug in and grow with the organization. There are long standing traditions with which many assume all members are familiar. Through the creation of a first-time attendee mentorship, previous attendees have an opportunity to communicate with a first-time attendee to share their knowledge of traditions and the Convention experience.

Additional opportunities to educate include a prior to arrival virtual 30-45 minute “what to expect” session for both collegiate and alumnae members to provide an engaging overview of the itineraries and opportunities to connect with one another.

While the number of days for Convention is under consideration there is an opportunity for pre- and post-Convention sisterhood events.

Virtual Participation in the Business Session
Virtual participation in the business session requires an individual to monitor the virtual participants to allow them to speak for bylaws debate. Cameras in the in-person business session would enhance the virtual participant’s experience by allowing them to see who is speaking at the microphone and other important moments.

Additional Equity-Enhancing Considerations
The subcommittee discussed additional aspects of Convention where equity could be enhanced, beyond the aspects detailed in the original resolution and noted that the Confirmed Conventioneers parade could be modified to be more inclusive. While this is a much-beloved Gamma Phi Beta tradition, the Confirmed Conventioneers parade, which honors members who have attended five or more Conventions, inherently
celebrates those who have the means (finances, time, etc.) to consistently attend Convention year over year. Recognizing that this is a difficult commitment for many members to make, the subcommittee recommends that consideration be given to how the Confirmed Conventioneers parade can be modified to celebrate all Convention attendees. This could be as simple as extending the parade to include all attendees, starting with first-time participants. The history and recognition behind the event can still be maintained and shared while also ensuring that all members, regardless of their ability to attend Convention every year, feel included and honored for their efforts to attend.

RESULTS AND RECOMMENDATIONS

Due to the focus and commitment of Gamma Phi Beta to incorporate Belonging, Equity, Diversity and Inclusion initiatives into event planning such as Convention, some of the recommendations within this report are in the process of being integrated into future Conventions for both short term and long term planning. The recommendations provided are for the purpose of ensuring that Convention is both accessible for attendees and intended to promote lifelong sisterhood fostering belonging and inclusion.

The recommendations pertaining to the Resolution are as follows:

1. Gamma Phi Beta should continue to offer tiered or a la carte registration options, to the extent that it is operationally feasible, for in-person attendance. Virtual attendance should be included as an additional tier of registration and consideration should be given as to whether chapters may be able to purchase a virtual attendance package to allow their members to “attend” together.

2. Continue to offer a virtual attendance option for Convention to provide a more inclusive and accessible experience for all members. Registration costs should account for the significant additional production expenses that enabling this option incurs while also providing a more accessible price point to encourage greater participation and inclusion in Convention.

3. Flexibility to purchase tickets to Convention events that include a la carte meals should continue to encourage affordability and flexibility, and Gamma Phi Beta should continue to accommodate dietary restrictions and preferences.

4. Mandatory attendance at Convention should continue to be restricted to a chapter delegate and alternate delegate with the advisor being highly encouraged. This reduces the financial burden on collegiate chapters.

5. Leverage the virtual component of Convention attendance to increase opportunities for meaningful engagement, while also preserving essential engagement components of Convention such as badges and volunteer recognition. Further research and considerations are recommended for after 2024 Convention to determine scheduling opportunities to connect collegians and the volunteer workforce through panels or breakouts (both in-person and virtually) on topics of interest such as career questions, joining the volunteer workforce, etc.

6. Explore the creation of a first-time attendee mentorship program where previous attendees offer to act as a guide through Convention.
7. Ensure that virtual participation in the business sessions can be integrated seamlessly into the in-person experience and vice versa. This may include ensuring that virtual participants can participate in asking questions and that in-person participants approaching the microphone can be seen and heard by the virtual participants.

8. Consider how the Confirmed Conventioneers event can be modified to be more inclusive. This may include honoring all attendees, including first-time participants.
RESOLUTION 2020-7
Submitted by: Zach Shirley, Teresa Haney, Rachel Christine

Introduction
Resolution 2020-7 was entered into effect at the 2020 Virtual Convention, and the 2020-22 International Council directed the resolution to the Belonging and Inclusion Committee as a priority initiative. The Belonging and Inclusion Committee created a targeted subcommittee, composed of committee members and Sorority staff, to perform research, discussion and develop recommendations to address Resolution 2020-7.

Resolution
Whereas, There are a number of alumnae who are willing and able and have a desire to give back to the Sorority;

Whereas, There is a need for skill based volunteers who can share their expertise and are willing to freely give of their time, talent and treasure to benefit the Sorority at no cost;

Whereas, Volunteer positions posted on the website are impersonal and can slow the process of finding qualified volunteers;

Whereas, There are numerous benefits to institutional knowledge including building a sense of community for the furtherance of an organization that is looking forward to its 150th year; and

Whereas, There should be a culture of inclusion so that all members of all ages feel welcome, valued, respected and appreciated;

Resolved, That International Council take appropriate action to engage and offer experienced alumnae volunteers of all ages the opportunity to give back and build relationships that foster a multigenerational culture at the local, regional and international level.

RESOLUTION COMPONENTS

Volunteer Hiring
Gamma Phi Beta has moved to a model of posting council appointed committee, regional, and certain chapter level positions (chapter advisor, recruitment advisor and financial advisor) through the Jobvite website which is linked to the Gamma Phi Beta website for updates. Volunteer leaders are able to coordinate with HR staff to have a job posting added and monitor all applicants. Additionally, there is a general volunteer form interested individuals are able to complete if they are interested in volunteering in general. Review of the process found for these mentioned positions, which can be remote or local, revealed this is the most equitable process. It allows individuals who may be new to volunteering or have taken a break from volunteering to have the same playing field when it comes to the application process. An impartial system which reviews experience inside the organization and outside of it allows for the hiring process to become what someone knows versus who they know. We find this process should be considered for expansion of all chapter positions, especially for new chapters looking to fill an advisory board for the first time.
Create Database of Volunteer Applicants
As previously mentioned, a general interest form is housed on the Gamma Phi Beta Jobs site. This information is stored but is not shared with those volunteers “hiring” for their departments when there are openings and they lack applicants. Consideration should be taken to allow for volunteer leaders to have access to the profile and application information to allow for connection of interested individuals and open positions.

Acknowledging Gamma Phi Beta is an ever-evolving organization, roles and responsibilities within these roles can change over time. Institutional and historical knowledge is important in order for the organization to remain true to our values; Gamma Phi Beta may need this knowledge and experience in other roles than the one an individual previously applied for. Consideration should be taken to include those who applied but were not chosen for a specific role in said database to connect them with a role that allows for them to serve Gamma Phi Beta in a meaningful way which utilizes their skillset.

Additional Equity-Enhancing Considerations
The subcommittee discussed additional aspects of volunteering and limits regarding individuals who are engaged in the volunteer structure — both in the collegiate and alumnae arenas. The concept of term limits, especially in the alumnae volunteer space were also discussed. Unlike the collegiate arena, there are not multiple positions within one region to move toward. Therefore, when an individual reaches their term limit, they are no longer able to volunteer with this particular group as the term limits currently read. With the commitment to alumnae chapters, engagement and the growth of the alumnae initiate program, consideration should be taken to allow volunteers in all areas of the structure the ability to move through the department with re-application or through application to another region.

RESULTS AND RECOMMENDATIONS
Due to the focus and commitment of Gamma Phi Beta to incorporate Belonging, Equity, Diversity, and Inclusion initiatives into all aspects of life within Gamma Phi Beta, some of the recommendations within this report may already be in works of application. The recommendations provided are for the purpose of ensuring that individuals feel engaged with Gamma Phi Beta for the length of their membership.

The recommendations pertaining to the Resolution are as follows:
1. Gamma Phi Beta should continue to post roles online for open application and knowledge for all membership. Consideration to expanding the ability for posting all advisory board positions which allow remote advising should be taken.

2. Gamma Phi Beta should create/house a database accessible to hiring managers comprised of those who have filled out the general interest from and/or previously applied for positions and were not selected.

3. Gamma Phi Beta should review to determine if term limits are being applied equitably for those departments which do not allow for a change in position title when an individual has reached their maximum terms in a role.
150TH CELEBRATION COMMITTEE
Committee Chair/s: Krista Davis (Bowling Green)
How many times the committee has met over the biennium: 12

The 150th Celebration Steering Committee was formed in 2021 and consists of 17 professional staff and volunteer members representing all three organizational boards, the Ritual and History Committee and multiple generations and geographic locations.

The sesquicentennial celebration will occur throughout 2024 and include multiple events and opportunities for members and valued stakeholders to honor, remember and celebrate 150 years of True and Constant sisterhood. The celebration will culminate with Founders Day events and remembrances in November 2024.

The committee has developed the following success statement and metrics for the celebration:

A successful 150th celebration of the Sorority will increase engagement and pride in Gamma Phi Beta by sisters and members our community.

Success will be measured by setting metrics in the following areas:

- Celebrate history
  - Increased awareness, knowledge and understanding of our history and values
- Foster pride
  - Increase member pride in the Sorority with collegians and alumnae
- Connect with members
  - Increase in alumnae engagement
    - Increase in alumnae dues payers/Life Loyal
    - Increase in new volunteers
    - Increase in new Foundation donors and dollars raised
    - Increase in members in good standing
    - Increase in dollars raised through the events
    - Increase in collection of current contact information

Community includes university personnel, professional workforce, parents/family, Girls on the Run and vendor partners.

The Steering Committee has established six sub-committees to plan and execute all elements of the 2024 year-long celebration. The sub-committees are Communications and Marketing, Events, Fundraising, History and Ritual, Member Engagement and Pride and Recognition. The sub-committees comprise more than 50 volunteers who meet monthly to develop and execute plans in their content areas. Preliminary work in all areas has begun, including the development of a special logo for the celebration. The logo will be used over the next two years as plans begin to be announced.

The sesquicentennial milestone is one Gamma Phi Beta members will remember for years to come. It will also help create deeper engagement for the future, looking to the next 150 years of relevant opportunities for women who celebrate sisterhood and make a difference in the world around us.
AUDIT AND FINANCE COMMITTEE
Committee Chair/s: Judy E. Graham, Ph.D. (Oklahoma)
How many times the committee has met over the biennium: 12

The Audit Committee is a standing committee supporting both International Council (IC) and the Facilities management Company (FMC) Board of Managers in their financial and fiduciary responsibilities. The two main tenants of the committee will be to review the draft audit and tax preparations to help support IC and the FMC Board of Managers in performing critical assessments of the material and be a guide and resource to IC and the FMC Board of Managers to support and help them in meeting fiduciary obligations.

The committee works closely with Gamma Phi Beta’s chief financial officer, auditors and investment advisors. Processes are in place to ensure quality operations and maintenance of our fiduciary responsibilities. They include the following:

- Quarterly review of our investment portfolio – the committee holds quarterly portfolio reviews with our investment advisor, Bernstein. These reviews examine the status of our portfolio, market trends and any recommendations that Bernstein may have. The committee evaluates this information and if any recommendations are made, they are shared with IC and the FMC Board of Managers for review.
- Audits and tax preparations – the auditors for both the Sorority and the FMC are Plante Moran. The committee acts as a first review for audits and tax filings. Questions and concerns are addressed by the committee prior to the presentation of these documents to the two boards. If the committee has any comments or recommendations, those are provided to the boards prior to their review.
- Budget review – during this biennium the committee has begun a review of the proposed budget prior to that budget draft being presented to the IC or the FMC Board of Managers. This has allowed for additional review and any committee recommendations are passed on to the respective boards.

Additional actions of the committee this biennium include:

- Creating and recommending an updated investment policy to the two boards.
- Reviewing the engagement proposal from our auditor, Plante Moran. The committee recently recommended to the two boards to extend our engagement with Plant Moran for an additional three years.
- Along with the FMC Board of Managers, monitoring the status loan covenants held by the FMC.
BELONGING AND INCLUSION COMMITTEE
Committee Chair/s: Rachel Christine (Texas A&M-Corpus Christi) and Samantha Keltner (Northern Iowa)
How many times the committee has met over the biennium: 20

The Belonging and Inclusion Committee is a standing committee whose purpose is to assist International Council (IC) in supporting the prioritization, identification and implementation of practices related to Belonging, Equity, Diversity and Inclusion (BEDI) in the context of Gamma Phi Beta Sorority.

Objectives and Responsibilities
• Educate and increase awareness and understanding of One Gamma Phi Beta (the Sorority, the Facilities Management Company and the Foundation) board members and workforce on matters related to BEDI, as requested by board members or as identified by the committee
• Annually review the Belonging and Inclusion Task Force Report
• Annually review definitions of Belonging, Equity, Diversity and Inclusion used by Gamma Phi Beta and submit changes to IC for approval, as needed
• Annually review prioritized recommendations from the Belonging and Inclusion Task Force Report and submit changes to IC for approval, as needed
• Provide IC with periodic updates on progress toward completion of recommendations in the Belonging and Inclusion Task Force Report
• Assist One Gamma Phi Beta board members and workforce in the implementation of recommendations from the Belonging and Inclusion Task Force Report
• Serve as a supplementary resource to One Gamma Phi Beta in researching, reviewing and discussing matters related to BEDI beyond those identified in the existing prioritized plan
• Perform other duties and responsibilities that may be assigned

Overview of the Committee’s Work Over the Biennium
• Reviewed and prioritized work outline in the Belonging and Inclusion Task Force report
• Supported work groups that revised membership selection, eliminated preferential treatment of legacies and financial accessibility of membership
• Provided recommendations on two Convention resolutions
• Established definitions for Belonging, Equity, Diversity and Inclusion for One Gamma Phi
LEADERSHIP DEVELOPMENT COMMITTEE
Committee Chair/s: Jessica Jecmen (Oklahoma City)
How many times the committee has met over the biennium: 24

The Leadership Development Committee is a standing committee whose purpose is to assist International Council (IC) in:

• Developing future leaders for board and committee level service within Gamma Phi Beta and in the interfraternal world through educational programming and cultivation.
• Developing a leadership strategy to ensure that effective, transparent preparations are made to support the Sorority’s strategic, policy-driven governance model.
• Cultivating and tracking future leaders in the leadership pipeline.

In the last biennium, the Leadership Development Committee has focused on three key areas:

• Further define the leadership pipeline strategy and areas of Leadership Development Committee support
• Refine existing and begin developing new leadership education programming opportunities
• Establish leadership cultivation as a responsibility of the Leadership Development Committee

The goal of creating a leadership pipeline within Gamma Phi Beta is to acknowledge, develop and build upon the experience women bring into their Sorority leadership roles. Further, the Leadership Development Committee is working to provide a defined path and curriculum to build leadership skills within the Sorority experience that can be used in the Sorority and beyond. The team evaluated the levels and experience that the Leadership Development Committee would support, and what engagement is required for board and committee level leadership.

The Leadership Development Committee used the Sorority’s agreed competencies by level when creating and refining our programs, with the most senior levels (5 and 6) applying to board and committee level service. During this biennium, the team has further refined our pilot program, The Clara Project, and is in development of three other educational opportunities to support Gamma Phi Beta’s leadership pipeline. The additional programs serve different levels of experience in board level service, and include Board Basics, Insights to Board Service and a practicum to explore these leadership skills in real Gamma Phi Beta scenarios.

The Leadership Development Committee included the cultivation of our leadership pipeline within our scope, with the support of International Council. The goal of our cultivation sub-committee is to connect with and support women in their Gamma Phi Beta leadership journey. This team will connect with sisters in the leadership pipeline on a regular basis by encouraging self-assessments, disseminating Gamma Phi Beta offerings and open positions, taking member feedback to create central materials and resources and developing new cultivation methodologies in collaboration with the rest of the Leadership Development Committee. This work requires additional Leadership Development Committee members and will begin in the new biennium.
MEMBERSHIP REVIEW COMMITTEE
Committee Chair/s: Lauren McMullen Jones (Bowling Green)
How many times the committee has met over the biennium: 18

The Membership Review Committee is a standing committee whose purpose is to assist International Council (IC) in:
- Reviewing requests for Gamma Phi Beta Sorority international disciplinary action and membership status changes.
- Reviewing and approving applications for alumnae initiates.
- Reviewing requests for granting alumna status under special circumstances and making recommendations to IC for action on such requests.

Objectives and Responsibilities
- Function as a disciplinary committee for both collegiate and alumnae cases as outlined in the rules and procedures of the Sorority
- Review and approve alumna initiate applications
- Review requests for granting alumna status under special circumstances and make recommendations to IC
- Educate IC on trends and important issues related to this committee
- Perform other duties and responsibilities that may be assigned

Overview of the Committee’s Work Over the Biennium
The Membership Review Committee evaluated the following cases:
- Four requests for early reinstatement
- 35 requests for termination
- 10 requests for alumnae status under special circumstances
RITUAL AND HISTORY COMMITTEE

Committee Chair/s: Mary Knaup (California State-Fullerton)

How many times the committee has met over the biennium: 7

The Ritual and History Committee is a standing committee whose purpose is to assist International Council (IC) in serving as a resource for all ritual matters and preserving the history of Gamma Phi Beta.

Most of the work accomplished by the Ritual and History Committee this biennium was in response to the needs of our members during the pandemic. The committee adapted ceremonies and created learning opportunities for our members to allow them to continue to have meaningful ritual experiences.

Our most significant undertaking was the collaborative effort between committee members and International Headquarters staff to address all components associated with the presentation of a virtual initiation. The various items addressed in relation to this project include:

- Creation of a virtual initiation service
- Creation of timelines, concepts and mapping of the actual ceremony components
- Creation of all guidelines and instructions for chapter officers
- President’s Interview ceremony revised for virtual presentation and guidelines addressed for e-signature of Loyalty Pledge
- Creation of video concept for Preface to Initiation
- Creation of all guidelines and instructions for alumnae guide and event assistants
- Recruitment and Zoom trainings for 16 alumnae guides who participate in all virtual initiations
- Recruitment and Zoom trainings for five event assistants who participate in all virtual initiations
- Badge Ceremony revised for in-person presentation, once chapters are able
- During this biennium upwards of 200 virtual initiations have been conducted, initiating well over 6,000 new members

The following other ceremonies were adapted for virtual use:

- Rite of Passage ceremony revised and taped for presentation consisting of four online presentations and one in conjunction with a virtual Senior Celebration presentation
- New Member Pledging Service ceremony revised for both virtual presentation and with physical distancing
- Chapter Meeting Ritual ceremony and guidelines revised for both virtual presentation and with physical distancing
- Founders Day service ceremony revised for virtual presentation
- Assist with planning and coordination for virtual President’s Interview, Initiation, and installation of officers for Eta Chi Chapter (California State-San Marcos)
Board Committee Reports

Training Sessions: Content Created and Presented

Fidelity 201 Online Trainings
- Understanding Virtual Ritual, February 2021
- Events Proceeding Initiation and Chapter Meeting Ritual, August 2021
- Initiation, September 2021
- Founders Day, September 2021

PACE Workshop
- Chapter Meeting Opening Exercises

Additional Accomplishments
- Updates to history website and collaboration with International Headquarters staff on content and processes
- Significant history content provided to Marketing team for inclusion on history website
- Alumnae Initiate Task Force participation
- BEDI Committee collaboration on ritual review

The Ritual and History Committee is also working as the sub-committee for the 150th Celebration. All members are assuming additional projects on the planning and execution of history celebration projects and the creation of a special anniversary ritual service.
TECHNOLOGY COMMITTEE

Committee Chair/s: Laszlo “Lots” Pook

How many times the committee has met over the biennium: 7

The Technology Committee is a standing committee whose purpose is to assist International Council (IC) in:

- Oversight of Gamma Phi Beta Sorority’s technology opportunities and technology investments and operational technology risk.
- Selection and use of technology that supports business objectives and strategies.
- Oversight of data security and data privacy and related policies and procedures.

Overview of the Committee’s Work Over the Biennium

- A new chair was appointed in 2020
- New committee members joined in 2021, requiring time for them to learn about the technology environment
- Invited the following departments and vendors to meetings to develop an understanding of the goals of Gamma Phi Beta: Alumnae Engagement, Chapter Services, Education, Facilities Management Company, Marketing and Communication, Technology and Computer Systems Innovations (CSI)
- Worked with Marketing and Communications to survey membership using Instagram
- Determined there is a need for a new learning management system within the Sorority
- Completed a proposal and business case for a new learning management system for consideration during the 2021 budget cycle
- Provided input on Technology department structure and job descriptions
- Reviewed the Cyber Resilience Assessment and drafted an Incident Response Policy
- Reviewed and updated the Document Retention Policy and met with legal counsel to understand Gamma Phi Beta’s data privacy requirements
- Worked with Finance team to review proposals and demonstrations for new Finance software
- Worked with FMC team to review proposals and demonstrations for new FMC software
Appendix
LEGACY CELEBRATION TASK FORCE
Report and Recommendations
May 2022

Charge of the Task Force
To find innovative and meaningful ways to celebrate legacy-makers and legacies through various stages of life. The Task Force is charged to explore the following:

1. Define when a member becomes a legacy-maker and when the celebration of the legacy connection begins. Consider how this connection changes throughout a member life cycle and different ways to celebrate and honor this relationship in these stages of membership.
2. Define similarities and differences between legacies who become Gamma Phi Betas and legacies who join other NPC organizations; consider ways to celebrate any legacy affiliation.
3. Consider both independent and institutional ways the legacy connection can be celebrated and recognized and make subsequent recommendations. Practices considered should explore methods that can be initiated by an individual, chapter, and the Sorority.
4. Define resource implications for each recommendation, including human and financial.
5. In consideration of our Sesquicentennial Celebration in 2024, provide recommendations on the way legacy-makers and legacies might be recognized.

Work of the Task Force
The Legacy Celebration Task Force was formed in spring of 2021. Task Force members: Christine Barr, Kendra Bocher, Stephanie Carriere (IC liaison), Jenna Heath, Addison Kirscht, Meryl Parks, Juliet Thompson, Nancy Ann Thompson, Kay Wilms collaborated with shared Google Docs and met over seven Zoom meetings beginning August 2021, with the bulk of the work being completed Spring 2022. Candice Kuzov and Carleen Sullivan were unable to participate at various stages due to life changes.

What Energized the Task Force
- Immediate realization and importance that legacy initiatives center on relationships and connections which build affinity for Gamma Phi Beta, beyond events, functions and other tangibles.
- Focus has traditionally been on the legacy entering college recruitment. Having initiatives that celebrate legacies and legacy maker connections enhances all member engagement.
- Inspiring active legacy initiatives connects to our values which brings the sisterhood experience to life at any stage of membership!
- Bold vision for legacy initiatives – thinking big, beyond the boundaries of Gamma Phi Beta and positioning the Sorority as a lead organization within and beyond NPC!
**Definition of Legacy**

The current Gamma Phi Beta definition of legacies is found in our Rules and Procedures:

38. **LEGACIES** – For the purpose of definition, a sister, daughter, granddaughter, or great-granddaughter of a Gamma Phi Beta is a legacy. Stepdaughter, stepsister, step-granddaughter, and step-great granddaughter may be considered legacies, if desired by the Gamma Phi Beta legacy-maker.

**Concerns of the Task Force**

While the actual definition of a Gamma Phi Beta legacy was not in the scope of this Task Force’s work, it quickly became apparent that the need for rethinking/redefining/repositioning the term would be essential to pave the way for advancing any new legacy initiatives. In order to expand and build on celebratory ideas, collegiate, alumnae and future members of Gamma Phi Beta will need education, inspiration, and top-down supported efforts to strengthen legacy connections and to execute many of the ideas set forth here. Especially as the Task Force worked to ensure honoring a BEDI lens with new ideas, redefining and repositioning “legacy” became an essential element when considering the positive impact of legacy celebrations, opportunities, merchandise, and stronger networks. Not exclusively with collegians, but especially with collegians, different or expanded terminology should be considered.

**Redefining, Rebranding and Relaunching “Legacy”**

- Preserving traditional familial connection—completely removing this defined connection can equally be negative. Expand to include more family ties like aunt, cousin, sister-in-law, foster connections, etc. Legacy in the familial tradition can still be naturally/easily celebrated and preserved surrounding our ritual with Initiation and Founders Day.
- Expand new legacy definitions beyond family to include mentor and role model relationships with women of all ages—Any strong relationship connection to a Gamma Phi Beta could potentially have legacy implications. New definition would be legacy as a lifelong action versus a birthright.
- Honor and highlight women who aren’t traditional legacies but who bring prestige, progress and power to a new legacy program – ie: first black woman to join a specific chapter, first LGBTQ+ person of highest leadership.
- Build an atmosphere that empowers members with programming focused on opportunities for all Gamma Phi Betas to intentionally build values-based connections that create legacy relationships.
- New legacy definition can be widely inclusive and could include first generation families coming into campus/Greek life, women who do not attend college, and women who represent marginalized populations.

**Collegiate Task Force Member Perspective:**

As our collegiate chapters have embraced Gamma Phi Beta’s BEDI initiatives and the recruitment policy change, the culture towards legacies has shifted. Chapters largely view legacies as having been “canceled.” The traditional idea of legacies within some chapters has a negative slant (from the inclusivity, elitism, privilege aspect which was perpetuated by preferential treatment in recruitment). But the change in policy has also brought a generalization to the term, beyond the necessary and appropriate recruitment-related policy changes. BEDI chairs, collegiate members and recruitment advisors shared the following insight:

- A common comment today is “legacies no longer exist for Gamma Phi Beta” or “legacies aren’t a thing anymore in Gamma Phi Beta.”
- Legacies are seen as negative when still thought of as connected with privilege, unfair advantage or unequitable position/status using the current definition. Even in simple functions of initiation.
order within ritual where legacies are placed at the front of a new member class in alpha order versus overall alpha order within the entire class—this visual appears weekly during chapter meetings and no longer makes sense as a position of status with collegians.

- Many alumnae continue to desire acknowledgement of legacies in recruitment as a “rite” or right of membership as a legacy-maker.
- During Gamma Phi Beta’s first recruitment without a legacy policy fall 2021, chapters often did not identify or discuss legacies, unless it was shared in an individual conversation and self-identified.
- Chapters followed the new method for mutually selecting legacies on individual merit without special consideration with invitations and bid lists.
- On some campuses, legacies are not being identified by Gamma Phi Beta or Panhellenic. Some are allowing optional space to self-identify through the Panhellenic information form.
- Freshman/sophomores may not really even know what legacy of the past was (could be a clean slate in fall 2022)

This led to discussion around the viability of the term “legacy.” How can this generation embrace celebrating something that has been effectively “erased?” Redefining new terms for “legacy” offers opportunities to expand positively and grow an entire program of connectivity across departments, initiatives, and lifespans of members.

**Legacy Definition Recommendation**
Create additional legacy and legacy maker definitions to include strong connections and relationships Gamma Phi Betas nurture with people in their personal spheres of influence. Expanding inclusively and intentionally in this way allows and inspires Gamma Phi Betas to actively live Sorority values and network, role model, mentor and connect in powerful ways throughout their lives. A broadened definition of living one’s legacy opens the opportunity to be a legacy and legacy maker for every member, regardless of family status, career aspirations, age, or history.

The Task Force resonates with the concept, wording, and assets of the term “emotional legacy” – defined as something that is conceptualized and role modeled during a lifetime. As one starts to age, this legacy can hold greater meaning when time seems to race by. It has to do with who we are as people, what we have to offer, what things we hold dear, and what we want others to know about us.

**Research/Task Force Findings**

**NPC Legacy Initiatives**
The Task Force confirmed that most NPC groups have removed the preferential treatment during recruitment yet have kept their traditional definitions with family ties—mother, sister, grandmother etc. There is no evidence that the Task Force could find that any NPC organization is working as strategically as Gamma Phi Beta to create new concepts and celebrations with legacies. This presents an opportunity to be a lead organization addressing legacy celebration as a next step. (See Appendix A)

**Ownership/Leadership**
Up until the removal of Gamma Phi Beta’s preferential treatment for legacies during the recruitment process, the ownership of the legacy “program” rested with the membership department/recruitment team.
As Gamma Phi Beta moves forward, the Task Force believes that legacy celebrations and programming should involve and integrate with many areas of the Sorority, touching staff, volunteers and all membership statuses:

- **Member Experience**
  - Alumnae and collegiate chapter support of legacy programming
  - Recruitment to promote the advantages of pledging women with an affinity and strong connection to Gamma Phi Beta
  - Collegiate and alumnae chapter officer roles to support legacy efforts
  - Legacy celebration events for Gamma Phi Beta chapters, on campuses, in cities, international organization
  - Support of legacy-makers
  - Connection with Building Strong Girls philanthropic focus
  - Alumnae life stage support/activities/education/celebration
  - Education
    - Collegiate and alumnae chapter programming
    - New member and chapter member education (to understand legacy)

- **Marketing and Communications**
  - Sorority events – Convention, Founders Day, RLC, RLI, etc.
  - Merchandising
  - *The Crescent* Articles
  - Social media campaigns and annual communication plan – legacy highlights in the regular rotation with consistent, timely promotions (this should not roll out as a one-and-done communication)
  - Website
  - Social media affinity group

- **Ritual**
  - Highlight legacy connections written into Initiation, Founders Day, other Ritual services

- **Foundation**
  - Scholarships specifically for legacies in the traditional and new definition which focus on the action of living and leaving a legacy vs inherited status

- **Administration**
  - Data collection and reporting – self-identification of legacies and tracking are key
  - Possible fulfillment processing

**Key Recommendations**

To create sustainable ongoing legacy celebrations and reposition the concept of legacy, the following key priorities should be considered:

- **Dedicated ownership** – someone within the workforce must hold this responsibility to provide consistency and to make legacy priorities exciting and effective (not a short-term project)
  - Ownership by a staff person with VL committee support (FMC, philanthropy repositioning efforts worked beautifully; whereas badge task force ideas never had one owner and struggled taking off)
  - Ownership by a collegiate and alumnae chapter officer within each chapter for full integration quickly across chapters and populations

- **Expanded and updated definition(s) of legacy**
Endorsement at the international level—this potentially could be deserving of a launch similar to significant programs (Moonball, Building Strong Girls)

Bold vision beyond current structures, rituals, events, and framework of the Gamma Phi Beta organization

Positive, professional promotion for all Gamma Phis to see strong personal connections and to prioritize living a Gamma Phi Beta legacy by the gifts we share of our actions, influence, building on the future

Based on Gamma Phi Beta’s current definition of legacy and consideration of expansion, the Task Force recommends the following per each component of the charge.

1. **Define when a member becomes a legacy-maker and when the celebration of the legacy connection begins. Consider how this connection changes throughout a member life cycle and different ways to celebrate and honor this relationship in these stages of membership.**

Under Gamma Phi Beta’s current definition of legacy, a member becomes a legacy-maker when she becomes a mother, grandmother, or sister. And when she determines that step relationships of the same qualify. There are also legacy-maker connections made when a related woman becomes an alumna initiate. The current definition of a legacy is a person who has one of the aforementioned familial ties to a member of Gamma Phi Beta.

The celebration of the legacy connection should begin immediately, though is ultimately the responsibility of the legacy-maker. Being a legacy-maker should be an added meaningful way to experience refreshed connections to the Sorority. Sharing the Gamma Phi Beta special experience with a legacy should occur throughout the legacy’s lifetime (not just prior to the start of college).

The Sorority’s role should be to provide ideas and resources to support and encourage this relationship regardless of definition. The onus will need to live beyond the legacy-maker, as has been current practice with identifying, engaging, and representing.

The legacy connection does and should change throughout both the legacy-makers and legacy’s life. Some ways to celebrate and honor this relationship in these various stages of life and membership could be:

- **General Childhood:**
  
  Create a legacy club, modeled by university alumni associations to engage legacies to adulthood. Club typically is offered for a one-time fee, starting at any age, with benefits provided over a span of time as child legacy grows. For example: moon charm at birth, moon bank to begin saving for college at toddler, Building Strong Girls book at elementary age, branded keychain at teen age, sticker/decal prior to college, add a discount certificate for Crescent Corner merch—all sent as subtle yet valuable reminders of Gamma Phi Beta values and the value of the connection to a Gamma Phi Beta. Can be fulfilled through Crescent Corner. Use incentive for club membership or purchase pricing with discount for being/becoming Life Loyal member.

- **Newborn/baby**
  
  - Special card sent from IH or alumnae chapter congratulating on birth
  - Provide baby milestone photo props with moon or legacy symbols for photographing at 1 mo., 6 mo., 1 year old etc.
› Baby legacy day “bag” (much like a bid day bag!) sold through Crescent Corner with moon rattle, photo frame, strong girl decor item or other branded merchandise with a legacy message
› Engaging social media campaign to celebrate new mothers and births
› Crescent moon charm sent to legacies/legacy makers at birth or when legacy relationship is identified (this initiative was done in the past – noted as special/positive, but needs ownership and consistency
› Mother-daughter merch– matching charms, shirts, sippy cup/coffee mug

• Child (ages 1-12)
› Kids book about girls’ empowerment (Could a Gamma Phi Beta write/illustrate such a book to be gifted? Could have Building Strong Girls tie as well. Could be sold in Crescent Corner or gifted as a legacy club package as noted prior)
› Create connections with and avenues for collegians to get involved with local legacies and legacy-makers. Examples: Girl Scout Cookie sales, volunteer reading programs at elementary schools, visits and tours of chapter houses, etc. to build stronger relationships and show that the collegians recognize the importance of legacy relationships

• Teenager (ages 13-18)
› Conduct social media campaigns
› Partner with alumnae Panhellenic to provide information on sororities-- encourage legacies for sorority recruitment
› Encourage/inspire Gamma Phi Beta alumnae to share their personal Gamma Phi Beta stories to their legacies (timely with legacy becoming college age)
› Honor locally in areas with strong alumnae with an annual legacy event to showcase fraternity and sorority life. Could partner with campus leadership for open houses, Greek Getaway events to get inside glimpse of chapter facilities/life.

• College student (ages 18-23)
› Create intentional special parts of ceremonies and ritual services– new member pinning, Founders Day, Initiation. Can be as simple as verbal introduction when speaking or a separate defining charge as a “responsibility’ of membership to live a legacy.
› Partner with alumnae chapters to create legacy/ legacy-maker special events. Collegians will need to experience the benefits of connecting as legacies/ legacy-makers beyond social media and organizational education.
› Initiation attendance by the legacy-maker. Invite legacy to wear the pin of legacy-maker. Many chapters do not engage legacy-makers intentionally for bid day, pinning, initiation which begins the collegiate legacy journey.
› Chapters host a legacy celebration dinner for the campus/interfraternal community
› Women’s day— Most chapters are adapting “mom’s weekend” into women’s day, inviting mentors, strong women friend influencers. Could build this event out with a legacy component. Event could become the signature place and time for special chapter level touch point like traditional legacy makers and legacies experience with Founders Day and Initiation ritual.
› Attend Founders Day event with your legacy (all adult stages)
› Social media affinity group
New member programming that educates about legacy concepts and encourages every new member to thoughtfully consider how she is a legacy-maker and to build/live her own legacy connections

- Post college/young adult (ages 23-30)
  - Encourage young women to keep data profile updated at IH so legacy lifespans can be better tracked. Need a plan on how data and identification is gathered and managed with purpose.
  - Create welcome to alumni world programming based around legacies/legacy makers.
  - Attend Founders Day event with your legacy
  - Invite young alumnae with legacy connections to speak at Founders Day. This age group can have powerful influence on maintaining Sorority legacy connection as they are still friends with collegians and connected to campus norms. Not losing connection here will help with not having to re-acquaint, re-engage after losing touch with Gamma Phi Beta as young post-grad adults.

- Adult (ages 30-50)
  - Maintain updated demographic info—add profile info on website specifically identifying legacies/connections. Likely requires incentive or systematic approach to get mass traction. (Self-reporting will significantly limit. This age group is often the most multi-tasking and demanded with time in career, young families and elder care commitments, so important to engage with viable legacy messaging/efforts)
  - Social media campaigns to meet this age group where they “live”
  - Legacy merchandise
    - Special pin, dangle or jewelry piece to recognize legacy-maker and legacy
    - Legacy spirit wear (babies to adults) – branded and regularly refreshed and targeting this age group with fashion trend and function – busy career and moms on the go

- Sage adult (60+)
  - Resources for grandmothers to share bonds with younger legacies
  - Celebrations of legacy connections over a long lifetime—seasoned Gamma Phi Betas could potentially have many legacy connections to celebrate and be interesting features
  - Create a legacy-maker gift package for this age group featuring more nostalgic pieces
  - Invite to events to share Gamma Phi Beta perspective and personal “legacy” alumna has to give
  - Collegiate chapters of Initiation or locally reach out to older legacy-maker alumna with messages about the legacy she has left with their chapter and reinforce connections being carried on. Could be a handwritten letter campaign or a fun carnation craft keepsake executed during PACE or a sisterhood event at the chapter.

2. Define similarities and differences between legacies who become Gamma Phi Betas and legacies who join other NPC organizations; consider ways to celebrate any legacy affiliation.

Similarities of legacies who become Gamma Phi Betas and legacies who join other NPC groups:
- Commitment to tradition and high ideals
- Connection to family/legacy maker(s)
- Understanding of sorority, philanthropy, lifelong commitment
• Invigorates alumnae participation when legacy joins
• Gamma Phi Beta legacy-maker supports other Sorority where her legacy joins and vice versa
• Collegiate recruiters see Gamma Phi Beta values in PNMs who end up joining elsewhere
• Greeks held to a higher standard; builds powerfully, respected network
• Affinity for philanthropy and sharing treasure
• Commitment to whole woman education; social and emotional learning
• Legacy-makers can be excited to see legacies happy in any new home with letters
• Joining something bigger than themselves - an appreciation for being a part of group with shared visions
• Legacy connections may not be positive if legacy-maker has not actively introduced Gamma Phi Beta/Greek life or perceives the value of the connection to be in making membership happen through special consideration in recruitment.

Differences of legacies who become Gamma Phi Betas and legacies who join other NPC groups:
• Legacy-maker can attend/participate in Initiation and ritual if the legacy is a Gamma Phi Beta but not at other affiliations
• Understanding of Gamma Phi Beta values and history firsthand but not of other NPC groups
• Symbols, terms, specific values, and customs differ – red roses versus pink carnation
• Most differences may be simply superficial
• Differences also exist across Gamma Phi Beta chapters and campus cultures change

Ideas for celebrating ANY legacy affiliation:
• NPC officially recognizing any NPC legacy, no matter which group they join could immediately foster more global Greek life perspective for new members
• Global Greek “legacy” identification (without specific letters) could unify Greek organizations locally and nationally
• Host a local legacy celebration (i.e., dinner, speaker)
  o Example: luncheon hosted at Gamma Phi Beta house or on campus where anyone with any connection to Gamma Phi Beta could attend as a guest – relatives including mothers, brothers, professors, friends
  o Include all interfraternal groups
  o Could become a signature event for Gamma Phi Beta and be an example for other organizations
  o Partner with university alumni associations, who are always interested in engaging alumni in meaningful ways on campus
  o Partner with NPHC, NMGC, IFC and other Greek related organizations for expanded BEDI initiatives
• NPC legacy celebration day (like NPC badge day)
• Crescent Corner/merch options that are broad for legacy affiliates to purchase and show pride for Gamma Phi Beta and global connection to others
• Consider harnessing the power of Capitol Hill visits where organizations unite to represent the greater good – creating logos, taglines, and talking points about living a Greek legacy
• Signature legacy and legacy-maker jewelry – contemporary designs beyond the classic “mother’s pin”. Include badge dangle charms for legacies who join another sorority

3-4. Consider both independent and institutional ways the legacy connection can be celebrated and recognized. Practices considered should explore methods that can be initiated by an
individual, chapter, and the Sorority. Define resource implications for each recommendation, including human and financial.

Ways the legacy connection can be celebrated/recognized and initiated by Gamma Phi Beta Sorority:

- Administration
  - Registration of legacies at International Headquarters through our membership database
    - Add to member profile on website
    - “Self” reporting by family—similar to when a deceased member is reported
    - Could be an opportunity to engage alumnae chapters as an active effort for communicating with IH
    - Consider incentive, along with education as to why it is important to track legacy information—identify the benefits for being identified as legacy/legacy-maker
    - Could offer incentive for registering legacy info—charm, decal, photo frame etc.
    - Identify collegians through new member programming and Beta Base reporting
  - Congratulatory card for legacy maker and legacy if pledged to Gamma Phi Beta or another sorority

- Chapter Programming
  - Recruitment training tools focused on conversation techniques and connecting with all women who have affinity for or existing connection to Gamma Phi Beta. The policy change should not remove the emphasis on positively and actively recruiting women with legacy-type ties to the Sorority.
  - Create a plan for campus-wide legacy recognition event (The Sorority would create the working document and guidelines, alumnae and chapter would take the lead on following the plan and initiate the event with content, food, speakers, logistics)
    - Provide a how-to guide with steps to manage event
    - Provide branding materials and promotion examples
    - Pilot concept on a few campuses to test and assess viability (much like Moonball launch)
    - Partner with colleges and universities on family weekends or with alumni associations in using facilities, broader networking (could help with sponsorships)
    - Potential tie into Gamma Phi Beta Founders Day
    - Create a “ceremony” or standard purposeful intro and conclusion speeches to frame the event to legacy impact
    - Use social media and The Crescent to promote and encourage the relationship
  - Work with NPC and all Greek organizations to create a National Legacy Day (similar to National Badge Day)
    - Create national branding/logo for use by all organizations (similar to anti-hazing and badge day)
    - Merchandising with signature logo and messaging
    - Alumnae chapter host a “tea” type legacy event involving all sororities
    - Added benefit/reminder to lifelong commitment
    - As simple as a social media endeavor (post and tag a photo of you and your legacy, of your NPC legacies, fraternity, and sorority family connections, etc.)
    - Could be started within Gamma Phi Beta and catch momentum through social media alone by Gamma Phis tagging NPC, NPHC, NMGC, IFC connections!
• **Alumnae Engagement**
  
  - Articles, social media with alumnae legacy-maker profiles and inspirational stories and campaigns
  - Consistent messaging/programming to educate about legacy definitions and power of relationships
  - Form a legacy club (similar to university alumni association legacy clubs for anyone under age 18) where any alumna may enroll a new little legacy. Most feature appropriate gifts covered by a one-time club charge.
    - **Ideas:** initial congratulatory card, crescent moon charm, and baby onesie/bow etc. photo props or growth chart, moon bank, book about strong girls, keychain and decals for teens.
    - **Gifts would be at milestone years.**
    - **Could connect with BSG/GOTR as a legacy prepares to enter third grade.**
    - **Add a discount incentive for merchandise at Crescent Corner for legacy-maker**
    - All costs of club fulfillment are paid by the legacy-maker or giver of the gift
    - A portion of the fee could fund legacy scholarships
    - Potentially fulfillment heavy and relies on tracking data so would be a staff-owned piece versus volunteer

• **Events**
  
  - Designing and piloting local legacy related events for collegiate/alumnae chapters to ultimately manage – on the same order as Moonball, PR In A Box of our past
  - Task Force sees opportunity in many events for implementing legacy moments and highlights in subtle ways with little to no cost
  - Recognition at Convention and profile events... Could be as simple as a ribbon, name tag, standing during an event, leading opening welcome traditions, and identifying legacy/legacy-maker
    - **Create Convention legacy award for active, powerful legacy relationships**
    - **Incorporate a mic moment - to describe “legacy” and their legacy within Gamma Phi Beta**
    - **Have a Convention speaker with legacy focus. This would be an added cost to the Sorority depending on the speaker**

• **Marketing and Communications**
  
  - Create a powerful, timeless, all-member inclusive tagline such as: *Living a Legacy – The next generation*. This can employ forward thinking and positively impact raising up the next generation of legacies and legacy-makers.
  - Collecting stories of legacy makers/legacies to highlight on social media/Crescent -- can promote as new definition or redefining legacy in Gamma Phi Beta
  - Profile pieces in *The Crescent* and social media campaigns to consistently reinforce the rebranding of the term legacy and broadening of its definition. What does it now mean? How can we still celebrate it? How everyone can truly be a legacy maker, and how Gamma Phi Beta could lead fraternity and sorority life in rejuvenating rather than restricting and abandoning legacies all together. Point of information shared with Task Force: *The Crescent* isn’t necessarily reaching the collegians with messaging delivered– social media is key
○ Regular rotation of articles in *The Crescent* about what it means to be a legacy, leaving your legacy.

○ Marketing social media posts/campaigns - Using our core values to promote all members being legacy-makers and the gift of living and leaving a legacy we all can give

○ Authorized legacy merchandise
  ▪ Involve our vendors to provide product
  ▪ Brand “legacy” for products (visual representation)
  ▪ Consistent contemporary brand for jewelry, apparel (idea-- moon and stars to represent expanding connections)

**Education**

○ Create resources for collegiate and alumnae chapters about benefits of legacy and what it means to be a legacy maker-- continue to highlight positive stories and powerful connections with legacy relationships

○ Create a legacy introduction form (not tied to recruitment) – share with chapters at another time of year

○ Collegians - need a good TikTok to engage on their level to embrace and understand the positive of legacy

○ Part of new member education with early messaging and example

○ Dynamic education throughout a collegiate experience (consider engaging PACE programs not necessarily through Fidelity)

○ Opportunities within current collegiate programming - integrate communications into chapter programs

○ Chapters submit annual report into Beta Base identifying legacy relationships, alumna initiate candidates or require “legacy” identification on the new member intake form

**Ritual**

○ New member pinning/Initiation/Founders Day invitations to legacy makers and highlighting relationships not the label or status as a part of Ritual. Collegians and alumnae on Task Force identified this as important to preserve mention of legacy relationships in Initiation

○ Senior Celebration rite of passage - impress importance of living a legacy beyond college

○ Provide a public ritual event inclusive of all family and friends to share

**Foundation**

○ Foundation scholarships for legacies – a new opportunity for funding and engagement

○ Fosters connections for lifetime giving and connecting to the Sorority

**Programs/Events**

○ Program with education, gifts, communications for life stages before college

○ International legacy day celebration (Gamma Phi Beta and/or NPC/Greek-wide to be held on campuses across the country!)

○ Lunch or dinner event with guest speakers - a gathering on campus of legacies/legacy-makers

○ Hotspots and events around the country for legacy social gatherings

Human and financial implications for these ideas: Unless noted otherwise, the above ideas would need to involve staff time and would need to become a part of the general workload. In most cases,
there could even be opportunities for creating a committee of volunteers to carry out the tasks. The beauty is that all ideas engage alumnae and collegiate members on some level.

**What are ways the legacy connection can be celebrated/recognized and initiated by chapters:**

- Host a legacy dinner with the local interfraternal/community. This Gamma Phi Beta legacy dinner would be for anyone in any Greek chapter or potentially with any connection to Gamma Phi Beta.

- Possible legacy responsibility within a chapter officer:
  - Committee by grade level
  - Alumnae/collegiate relations chair
  - Part of women’s/mom’s weekend (PRVP department)

- Legacy highlights on social media/Tik Tok

- Chapter budget addition for legacy event

- Chapter calendar preparation for the year

- Chapter social media campaign - guided from IH for chapter to use (chapter social media chair to send out directly to collegians) - Collegians respect info coming from a peer level (important for delivery)

- Order of the Crescent (extra credit points)

- Initiation - celebrate the legacy relationship - encourage legacy-maker involvement

- Alumnae chapters - recognition of birth of a legacy and legacy relationships

- Local legacy scholarships funded by chapters

- At Founders Day celebrations, have a recognition for legacies and legacy maker connections. It ties so beautifully into the idea of the Founders tremendous legacy existing today. Could be as simple as standing during dinner or sharing when introducing.

- Gamma Phi Beta chapters create and host a legacy luncheon or tea. Could be campus Greek-wide with a speaker who promotes the concept of leaving a legacy and power of Greek life. (Houston Alumnae Chapter model)

- Spirit week training and inspiration for collegians to have the concept of living a legacy and women with prior affinity for Sorority values top of mind into recruiting.

- Have legacy-maker education for alumnae through their chapters
  - Illustrate how things have changed within Gamma Phi Beta; with recruitment (i.e., virtual, legacies, Panhellenic implications, RFM and voting procedures, campus culture)
  - Show positive benefits of joining any organization and still being connected to Gamma Phi Beta as a legacy – one is a legacy with Gamma Phi Beta no matter what letters one is wearing
  - Promote shift in thinking that legacy benefit isn’t membership consideration, it’s the beauty of the relationship

- **Activities**
  - Plaque/poster inside chapters to signify significant “firsts” or legacy starters
  - Handwriting notes to legacy makers and legacies upon joining
  - Legacy-maker invitations to bid day, new member pinning, Initiation, philanthropy events
  - Invitations to return “home” to chapters more frequently – this is the collegiate-alumnae relations action those legacy priorities could invigorate

Human and financial implications for these ideas would mostly be borne by the chapters themselves. Resources for chapters would need to involve staff time.
What are ways the legacy connection can be celebrated/recognized by the legacy-makers and legacies individually:

- Share a piece of Sorority jewelry
- Legacy-maker can still write a letter of introduction/form for legacy
- Legacy-maker attends Initiation, Bid Day, Founders Day
- Better education to chapters and alumnae on legacy wearing legacy-maker badge for entire collegiate experience, even though legacy still needs to purchase a badge.
- Creating a special note card or keepsake that captures that feeling most Gamma Phi Beta’s have when a legacy is born…the message describing legacy connection could be written at birth and then given to the legacy as she goes to college
- Legacy-maker and legacies can participate together in Gamma Phi Beta events and activities– Girls On The Run, fundraisers, homecoming etc.

Human and financial implications for these ideas would again include staff time and be a cost to the legacy-makers and legacies to participate. With focus on relationship building, the biggest cost to the members would be their time to focus on connecting through Gamma Phi Beta.

5. **In consideration of our Sesquicentennial Celebration in 2024, provide recommendations on the way legacy-makers and legacies might be recognized.**

The 150th provides perfect opportunity and relevant timing to consider redefinition and rebranding of legacy and its meaningful celebrations in Gamma Phi Beta. This historical look back and look to the future feels very natural to feature legacy highlights along with Sesquicentennial celebrations!

- Legacy highlights can be incorporated in subtle ways at little cost into most any events planned.
- Launch social media campaign that features various legacy stories and highlights, and to collect legacy data.
- Search for unique legacy spotlight stories– most years of generational connections, reverse legacies with alum initiates, unique multi-faceted “new” definition connections with coaches, teachers, non-traditional family ties as legacies and legacy makers, all-Greek life legacy connections.
- Tailor and solicit legacy stories and promos to the cities where 150th events are held.
- Affinity Groups on Facebook – add a new legacy/legacy maker group.
- Crescent Corner could use legacy/legacy makers like moms/daughters as models for legacy related clothing and 150th memorabilia.
- At Convention, 150th new logo featured on T-shirts modeled by legacies.
- Convention/150th breakfast table topic highlighting new legacy initiatives.
- Legacy pairs lead blessing, welcome, invocation type mic moments at the podium and introduce as such.
- Prepare for the 150th by seeking out legacy connections and stories at St Louis Convention – photograph people, record stories/videos.
- *The Crescent* article idea – “Beyond Biological Bonds”... it’s been about more than recruitment and privilege for 150 years
- Search back through *The Crescent* archives for legacy-related stories from the past 150 years and link to social media for celebrating legacy connection concepts today..
- Frances E Haven legacy Jennifer Cibor (College Park, MD) feature story.
- Legacy and legacy maker ribbons or stickers for name tags – could say “living a legacy” or “celebrating my legacy”.
- Add to our core values for future: Love-Labor-Learning-Loyalty-Legacy
- Present or debut special legacy jewelry during the 150th year.

We appreciate the opportunity to assess, explore and brainstorm fresh perspectives for legacies and legacy celebrations through this Task Force. The timing is perfect to focus on relationships and connections surrounding legacies rather than labels and birthrights. We look forward to Gamma Phi Beta’s next steps for considering legacy initiatives fully integrated across the entire workforce and membership. At our core, Gamma Phi Beta is based in values and sisterhood and these new ideas represent ways to actively live out both and benefit members.

Thank you for empowering us to continue honoring and celebrating legacies in Gamma Phi Beta!

Respectfully submitted by:

Kendra Bocher and Nancy Ann Thompson, co-chairwomen
Committee members:
Christine Barr
Stephanie Carriere (IC liaison)
Jenna Heath
Addison Kirscht (collegian)
Meryl Parks
Juliet Thompson (collegian)
Kay Wilms
<table>
<thead>
<tr>
<th>NPC Group</th>
<th>Still Has a Traditional Legacy Policy</th>
<th>Removed Preferential Treatment</th>
<th>Next Steps</th>
<th>Legacy Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alpha Chi Omega</td>
<td></td>
<td>X</td>
<td></td>
<td>Legacy is a sister, daughter, granddaughter or great granddaughter of a member. The Alpha Chi Omega member and her family members define their legacy relationship, i.e. step relations, blended families, etc. We encourage our alumnae members to share with their legacies the impact of Alpha Chi Omega on their lives. Further, the work of alumnae to submit recommendations on behalf of a legacy continues to be vital to the success of recruitment and the future of our organization.</td>
</tr>
<tr>
<td>Alpha Delta Pi</td>
<td></td>
<td>X</td>
<td></td>
<td>A legacy is a sister, daughter, or granddaughter of an initiated member of Alpha Delta Pi. It is the policy of Alpha Delta Pi to give these sisters, daughters, and granddaughters special consideration for membership since the initiation of these women strengthens family ties, giving the chapter increased support.</td>
</tr>
<tr>
<td>Alpha Epsilon Phi</td>
<td></td>
<td>X</td>
<td></td>
<td>A legacy is a granddaughter, daughter or sister of an AEPhi, without regard to chapter. This includes step granddaughters, daughters, and sister and half-sisters. Cousins and nieces are not considered legacies.</td>
</tr>
<tr>
<td>Alpha Gamma Delta</td>
<td></td>
<td>X</td>
<td></td>
<td>Has not created anything special/extra to recognize legacies. Are emphasizing that legacies have the opportunity to attend member only ceremonies/events with their legacy relationship.</td>
</tr>
<tr>
<td>Alpha Sigma Alpha</td>
<td></td>
<td>X</td>
<td></td>
<td>ASA values relationships including those that exist among family members. Legacies are defined as: Sister/step-sister, Daughter/step-daughter, Granddaughter/step-granddaughter, Niece/step-niece of an Alpha Sigma Alpha member.</td>
</tr>
<tr>
<td>Alpha Phi</td>
<td></td>
<td>X</td>
<td></td>
<td>Legacies will still be defined as any daughter, granddaughter, great-granddaughter, stepdaughter, sister or stepsister of member</td>
</tr>
<tr>
<td>Alpha Xi Delta</td>
<td></td>
<td>X</td>
<td></td>
<td>Still recognizes legacies by definition, but do not give preferential treatment; still welcome recommendations, but never did require them. Intentionally let “Rose Petal” program fizzle out. Used to have a special gathering for them at Conventions and encouraged Alumnae Associations to recognize them locally. Found that to get messy when recruitment time came. (“She went to every Rose Petal event you held and she was still released!”)</td>
</tr>
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<td>NPC Group</td>
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<tr>
<td>Delta Delta Delta</td>
<td></td>
<td>X</td>
<td></td>
<td>Tri Delta member who is a daughter or step daughter, sister or step sister, granddaughter or step granddaughter or niece of a Tri Delta. In 2012, Tri Delta did away with national legacy policy altogether and empowered collegiate chapters to determine chapter level policies. 2021 shift allowed moving entirely away from even the local chapter policies. See video on tridelta.org website</td>
</tr>
<tr>
<td>Delta Gamma</td>
<td></td>
<td>X</td>
<td></td>
<td>A legacy is the daughter, granddaughter, great granddaughter or sister (inclusion of step-relations for all) of an initiated member.</td>
</tr>
<tr>
<td>Delta Zeta</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>Kappa Alpha Theta</td>
<td></td>
<td>X</td>
<td>Did not create an alternative ceremony or celebration after eliminating preferential treatment. If they have a legacy connection, we still do allow that connection to attend initiation if that's something the chapter allow.</td>
<td></td>
</tr>
<tr>
<td>Kappa Kappa Gamma</td>
<td></td>
<td>X</td>
<td>No longer recognize legacy connections (beyond not offering preferential treatment) so we do not do anything for them.</td>
<td></td>
</tr>
<tr>
<td>Kappa Delta</td>
<td></td>
<td>X</td>
<td>Has not done anything beyond the policy change</td>
<td></td>
</tr>
<tr>
<td>Phi Mu</td>
<td></td>
<td>X</td>
<td></td>
<td>Phi Mu continues to define a legacy as a sister, half-sister, step-sister, daughter, step-daughter, granddaughter or great-granddaughter of a Phi Mu in good standing with the Fraternity.</td>
</tr>
<tr>
<td>Pi Beta Phi</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
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<tr>
<td>Sigma Kappa</td>
<td></td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sigma Sigma Sigma</td>
<td></td>
<td>X</td>
<td></td>
<td>A legacy is defined as a sister, mother, daughter, granddaughter, niece, stepdaughter, stepmother, or stepsister of an initiated member. Tri Sigma will continue to recognize and celebrate Tri Sigma legacies</td>
</tr>
</tbody>
</table>