

S.M.A.R.T. GOALS

S - Specific – the goal is clearly defined, easily understood, and it focuses on the details of what is to be achieved. When thinking about a goal, you should have a precise image in mind of what needs achieved as opposed to an ambiguous and vague idea.

You should be able to answer the following questions if your goal is specific enough:

1. Who is involved in achieving this goal?
2. What action(s) need to be accomplished?
3. When should the action(s) be completed?
4. Where should the action(s) take place?

M - Measurable – the goal describes a specific state by which success can be gauged. In a SMART goal, you should be able to measure progress as you seek to achieve your goal. It should be quantifiable as you track the milestones completed from one step to the next.

You should be able to answer the following questions if your goal is measurable:

1. What clear metric has been used to track progress?
2. How will I know when the goal has been accomplished?

A - Attainable – the resources needed to complete the goal are available. An attainable goal is one for which you have the required skills, knowledge, and resources already acquired or they can be easily accessed.

You should be able to answer the following questions if your goal is attainable:

1. What skill or resource is needed to accomplish this goal?
2. Are the items or skills needed to accomplish this goal available for me to use?

R - Relevant – the goal is realistic for the chapter and is it something that can be achieved in a few steps. A relevant goal is consistent with other plans you want to achieve.

You should be able to answer the following questions if your goal is relevant:

1. Is the goal worth the time and effort by the chapter?
2. Does the goal fit in well with the other pre-established chapter goals?
3. Does the goal align with the pre-existing job responsibilities of a chapter officer?

T - Time Sensitive – the goal has a target date to be achieved. Without an established deadline, the chapter is unable to measure the progress against a timeline and may deem the goal as unimportant.

You should be able to answer the following questions if your goal is time sensitive:

1. By when do I need to complete this goal?
2. How much time needs allocated for this goal to be achieved?
3. What milestones are in effect?
 - a. Are there steps that can be taken today? A week from now? a month from now?

GOAL SETTING

Now that the chapter understands SMART goals, we are going to put some recruitment goals in place. Use the template below to identify SMART goals the chapter wishes to achieve as it relates to recruitment.

S - Specific: State your object by identifying exactly what you want from your goal:

1. _____

2. _____

3. _____

M - Measurable: Now that your goals are identified, expand on them to add measurable components:

1. _____

2. _____

3. _____

A - Attainable: Now that measurable components have been added, determine how you will attain your goal. List out any resources you may need and make sure to list goals that can be easily achieved.

1. _____

2. _____

3. _____

R - Relevant: Tie your goal to your chapter mission. Make sure it is relevant to other goals established.

1. _____

2. _____

3. _____

GOAL SETTING (CONT.)

T – Time Sensitive: State the deadline by writing the exact date needed to achieve your goal.

1. _____

2. _____

3. _____

ESTABLISHING A VISION FOR RECRUITMENT

Before you can create goals for recruitment, you need to understand your chapter's outlook on recruitment. Please use the following reflection questions to understand how your members view recruitment.

Why is recruitment important for your chapter?

How would you define recruitment success for your chapter?

What actions must your chapter take to ensure a successful recruitment process?

Name the top 5 recruiters in your chapter.

1. _____
2. _____
3. _____
4. _____
5. _____

ESTABLISHING A VISION FOR RECRUITMENT (CONT.)

What qualities do the top 5 recruiters possess that make them the strongest recruiters. Reflect beyond “They’re outgoing” and write those qualities below.

1. _____
2. _____
3. _____
4. _____
5. _____

What steps can your chapter begin to take to increase the number of men in your chapter that are “strong recruiters”. Think back to those S.M.A.R.T. goals and create three action steps that the chapter can collectively take to improve recruitment.

1. _____
2. _____
3. _____

WHAT IS YOUR CHAPTER’S IDENTITY

One of the most common phrases in fraternity recruitment is “people join people”. Think back to your recruitment experience – why did you join your chapter? Chances are that the majority of members joining, join because they connected with some of the brothers and felt like they belonged in the organization. Now that you understand that “people join people”, it is important for all chapters to know their organizational identity. What type of men are in the chapter and what type of men do you want to see join? Use the below questions to help identify who the chapter is and what type of members do they want to encourage to join.

Perspective

How would YOU describe the chapter of Phi Sigma Kappa on your campus? Don’t focus on what others have shared about the chapter, focus on what you have felt and observed in your own experience.

WHAT IS YOUR CHAPTER'S IDENTITY (CONT.)

Influence

How would OTHERS describe the Phi Sigma Kappa chapter on your campus? Now is the time to reflect on the narrative other students are telling about your chapter.

Presence

What is your chapter DOING that drives how others perceive your chapter? What actions do members take? How do they live out the chapter values daily?

Identify three things your chapter is doing well to showcase the chapter's identity, how you wish it to be seen.

1. _____
2. _____
3. _____

Identify three things your chapter is doing that harms the narrative around your chapter's identity

1. _____
2. _____
3. _____

What are three actions the chapter can take in the next month to positively change how your chapter is perceived by campus?

1. _____
2. _____
3. _____

MOTIVATING THE MIDDLE

When we think of recruiting members, we often think of one or two people who are “in charge” of recruitment and thus, in charge of recruiting the membership. The dangerous part about this mindset is that it puts the bulk of the work on one or two people, which breeds a failed recruitment strategy. Instead, we want to motivate the majority of members to recruit rather than solely relying on the most outgoing member or the member with the word “recruitment” in his officer title.

We will be adapting concepts the book *Motivating the Middle* by T.J. Sullivan, to rethink how we approach recruitment. In his book, T.J. Sullivan introduces the idea that the chapter membership can always be broken down into thirds – the top tier, the middle tier, and the bottom tier, as described below:

The Top Tier: this category includes your top performers. Members that fall within this category are typically your officers/chapter leadership and the members that say “yes” to every commitment the chapter asks of them. They have internal motivation and will show up regardless. Take time to reflect and write down the names of members in your chapter that fall into this category.

1. _____	6. _____
2. _____	7. _____
3. _____	8. _____
4. _____	9. _____
5. _____	10. _____

The Mid Tier: members in this category make up the bulk of your membership. They are vested in the well-being of the chapter but may not have a formal officer role. Middle Tier men are typically on committees, are social, and going to the majority of events the chapter hosts. This group may need someone to ask them to step up and do something but are typically willing to follow through and complete what is asked of them. Take time to reflect and write down the names of members in your chapter that fall into this category.

1. _____	6. _____
2. _____	7. _____
3. _____	8. _____
4. _____	9. _____
5. _____	10. _____

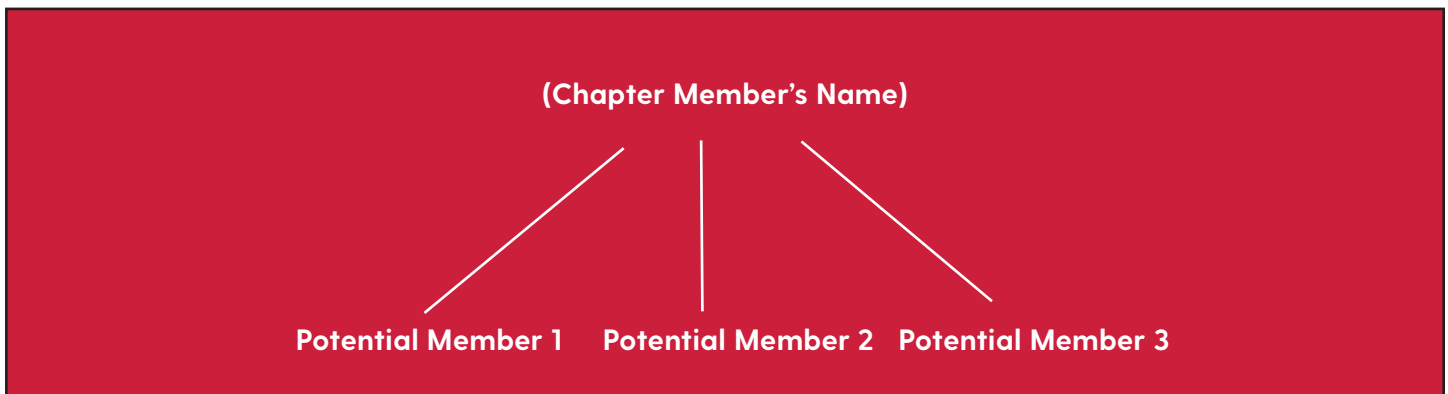
The Bottom Tier: members in this category are the individuals that pay dues but rarely attend chapter events. This group could include your checked-out seniors, members who don’t make grades to attend things, or members who are apathetic and uninvolved within the organization. Take time to reflect and write down the names of members in your chapter that fall into this category.

1. _____	6. _____
2. _____	7. _____
3. _____	8. _____
4. _____	9. _____
5. _____	10. _____

MOTIVATING THE MIDDLE (CONT.)

Now that you've identified men in your chapter that fall within these three categories, we are going to shift our focus onto recruitment. Ideally, men that fall within the middle tier are the individuals doing most of your recruiting efforts. Those in the top tier are focused on chapter operations and are the "face" of the organization throughout the year. They should be the ones organizing events, but those in the middle tier should be responsible for talking with perspective members and getting them through the door of the events.

Review back to the names of men that make up the middle tier for your chapter. Then request that each man listed in the middle tier write down 3-5 names of potential men and add those potential names onto your "chapter list".



The names of potential men should be just that, a brainstorm process – have them write down all the names that come to mind. After a full list is compiled, the chapter can go through and narrow down who they want to invite to events. Remember you want to maximize your invites to get the most men to walk through the door. Once prospective men attend the event, then you can evaluate how well each person will fit into the chapter and will align with your chapter values and identity.

CREATING “THE LIST”

For recruitment to be optimal, every chapter should start recruitment with a list of potential new members to recruit. While each chapter member should also be identifying 3-5 men to reach out to and invite to events, here are a few ideas for the chapter to implement and grow that list.

List Acquisition

1. Registrar's Office - Depending on your university's policies, you may be able to request a list of students with certain GPAs, to be provided to you from your University's Registrar's Office. You can then use that list to identify potential members to recruit. If your university won't provide that detail to you as a student, work with your campus' Fraternity/Sorority Advisor, IFC, or even your on-campus faculty advisor to request the list.

CREATING “THE LIST” (CONT.)

2. Dean’s List/President’s List - Your university and/or your Fraternity/Sorority Office will usually publicly post recognition for those who made the Dean’s and President’s List. Identify those who are not members of a fraternity and add them to your list to invite to recruitment events.
3. IFC No Bid List - Work with your IFC/Fraternity/Sorority Office to collect a list of men from the No Bid List. Men on the no bid list typically signed up for recruitment with interest in joining, but for one reason or another did not show up. Reach out and make a personal connection with them before inviting them to recruitment events.
4. Student Involvement Offices - Work with your Office of Student Involvement to identify leaders or members of different organizations that could make a great addition to your fraternity.
5. Scholarship Applications - If your chapter provides a scholarship that is open to anyone on campus, refer to those applicants and reach out to anyone who applied but isn’t a member.

Referrals

1. Ask your academic advisors and/or professors for names of standout students.
2. Have each member jot down the names of students in their classes and/or other extra curricular activities.
3. Ask your Orientation Office for the names of orientation assistants or the names from the new student class roster.
4. Ask sorority women if they know of anyone that they would recommend joining a chapter that is not already a member. Please note: women should NOT recruit for you or be a part of recruitment but you can ask them for referrals of people they know that would be a good addition to the chapter.

On Campus

1. Go to orientation and move-in events to meet new students.
2. Host interactive tabling events in high-traffic areas on campus.
3. Attend sporting events as a chapter to increase presence.
4. Connect with students attending other service-oriented events on campus.

SELECTING MEMBERSHIP

“When the values of an organization disappear, the value of an organization disappears.”
- Unknown

When selecting membership, you want to QUANTIFY how a perspective member aligns with the value and purpose of the organization. Often, chapters fall into a rut by stating that someone is a “good guy”, but what does that really mean? That you get along with them? That they are charismatic? Saying someone is a “good guy” doesn’t actually indicate how that person will fit into the chapter and be a productive member.

Adapted from the book Good Guys by Matthew Mattson and Joshua Orendi, use the below template to establish your chapter’s selection criteria of potential members. Display the criteria not only during your chapter’s vote on men, but also make potential new members aware that they will be chosen based on the achievements or characteristics displayed in your selection criteria.

Values

Standards

Examples:

- | | |
|-----------------------|---|
| - Academic Excellence | Has a 3.0 or above |
| - Community Services | Has a history of service including 4+ hours/month last year |
| - Friendship | Has a meaningful relationship with 3+ brothers |
| - Leadership | Holds a leadership position in at least one other campus organization |

THE “PRE CLOSE”

From the book Good Guys by Matthew Mattson and Joshua Orendi, the concept of a “pre-close” prior to “the ask” is established. Matt and Josh indicate that a pre-close is a tactic that the chapter can employ to prevent an invitation from being declined.

Prior to extending a bid, you should always do a “pre-close”. Ultimately, whoever will be extending the bid should ask “If we were to ask you to join the fraternity right now, would there be any reason you’d say no?”.

By asking the “pre-close” question, it allows a potential member to share their reservations and for you to validate that you understand, address their concerns, and direct them towards a member who had similar concerns when they were joining. Only once all their concerns are addressed, should you move onto “the ask”.

“THE ASK”

Now that the chapter has completed the “pre-close” and addressed all concerns from the potential member, you can move on to a bid extension. The five stages of an “ask” are as follows:

1. Small Talk & Transition - Anytime you ask someone to join, start with friendly small talk to reiterate you are interested in them.

2. Ownership Questions - This question allows for a transition and then turns the question back to the potential member. Examples of ownership questions look like:

- a. “I have really enjoyed getting to know you and I think you would be a great fraternity brother someday. What do you think?”
- b. “I’ve noticed some strong leadership skills in you, and I think a lot of the qualities you possess are the same qualities our fraternity looks for in its members. What do you think it would take for us to attract more men like yourself?”

3. Preclose - As listed above, the pre-close allows for the potential member to express concerns. Another example of a pre-close question would be:

- a. “_____, if the fraternity extended you a bid for Phi Sigma Kappa, what concerns do you have that would prevent you from saying yes?”

4. Quality Response - Once a potential member expresses a concern, acknowledge it! Some examples of quality acknowledging statements include:

- a. “I understand as I felt something similar. Let me share what I found from my experience...”
- b. “I didn’t have similar concerns but my brother _____ did. Can I connect you with him for you both to talk about them?”
- c. “Did I completely answer your question? Do you still feel like that concern would prohibit you from joining Phi Sigma Kappa if you were extended a bid?”

5. Close/Formal Bid - Now that you have gone through all the above steps and the potential member has not expressed any further concerns, you can extend the bid!

- a. “_____, the reason I came over to see you is because my fraternity has an important question to ask you. We would like to formally extend you a bid for membership into Phi Sigma Kappa – will you accept?”

Final Bid Extension Tips

1. Choose a comfortable environment for them when you extend the final bid. Asking during a party or when alcohol is involved is not advised.
2. Dress appropriately. If you want to be seriously considered, dress the part.
3. Be authentic! Listen to their response and be a friend first.
4. Keep the conversation about him, not you or the fraternity.