

Sigma Delta Tau Sorority
National Council
Needs Assessment Plan

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EME 601 Introduction to Instructional Design

Needs Assessment Assignment

Overview

Sigma Delta Tau is a National women’s social sorority, founded in 1917, at Cornell University by seven women who faced religious discrimination. The Society is now comprised of 63 active chapters with 5000 undergraduate affiliates and over 60,000 alumnae members. The mission of the organization is, “to enrich the lifetime experience of women of similar ideals, to build lasting friendships, and to foster personal growth. Sigma Delta Tau shall encourage each member to reach her fullest potential by providing intellectual, philanthropic, leadership and social opportunities within a framework of mutual respect and high ethical standards.”

The organization has four main goals, which are derived from their mission statement and organizational purpose. The first of these objectives is to promote academic achievement within each member by providing a multitude of intellectual opportunities. They also strive to instill a sense of philanthropy and community engagement. Through partnerships with organizations such as, Prevent Child Abuse America and Women for Women international, SDT hopes to engage all members in their mission to *Empower Women*. The third goal of the sorority is to build leadership skills and allow each member to nurture her individual talents. Finally, SDT strives to foster lifelong bonds of sisterhood and to create and international network of empowered women.

Sigma Delta Tau is comprised of several, easily isolated, subsystems; including Collegiate Chapters, National Headquarters, National Council and the SDT Foundation. The undergraduate chapters are supported administratively by the centrally located National Headquarters in Carmel, Indiana. The small office staff of 6 provides supplies, processes incoming requests, tracks chapter administrative functions and collects membership dues. All Society business functions are controlled by the Headquarters staff, including finances, public relations/communication, and the employment of Leadership Consultants for chapter support. The National Council is the governance subsystem and directs the day to day activities of the organization, as well as all strategic planning initiatives. The SDT Foundation is the charitable wing of Sigma Delta Tau, providing support through programming, scholarships and alumnae networking

Figure 1: Sigma Delta Tau Organizational Structure

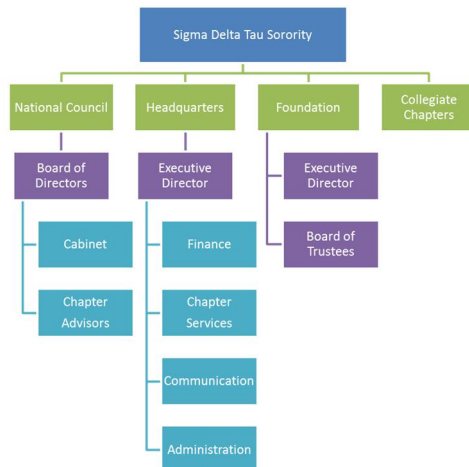
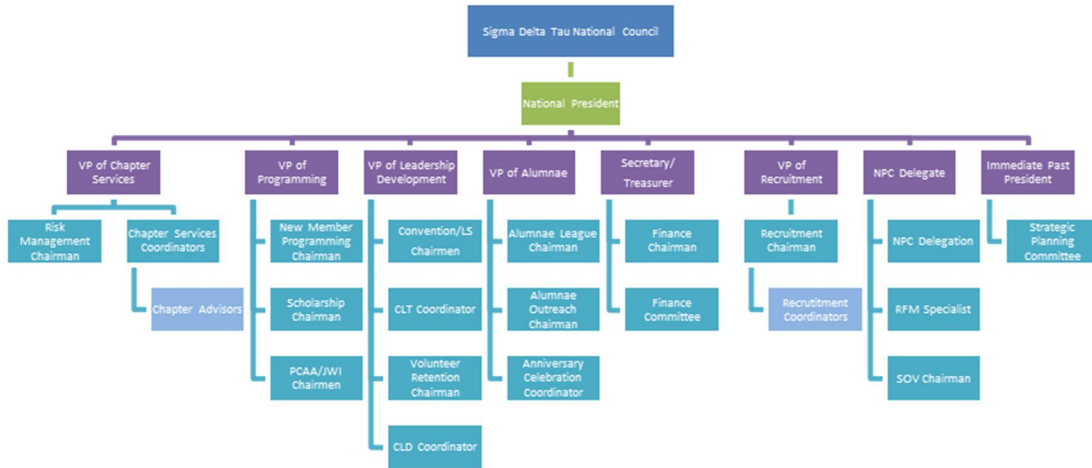


Figure II: SDT National Council Structure



Rationale

Current State

Sigma Delta Tau, a not-for-profit Greek letter fraternal organization, relies heavily on the support of alumnae volunteers to sustain daily operations. Currently, the Society maintains a network of over 100 dedicated volunteers, serving in a variety of roles including programming development, leadership training, chapter services, membership recruitment and strategic planning. These various sectors of chapter support all fall under the National Council umbrella. Over the past five years, the SDT governing body has experienced rapid growth with the addition of over 60 new members. However, they have not been quite as successful in retaining existing volunteers.

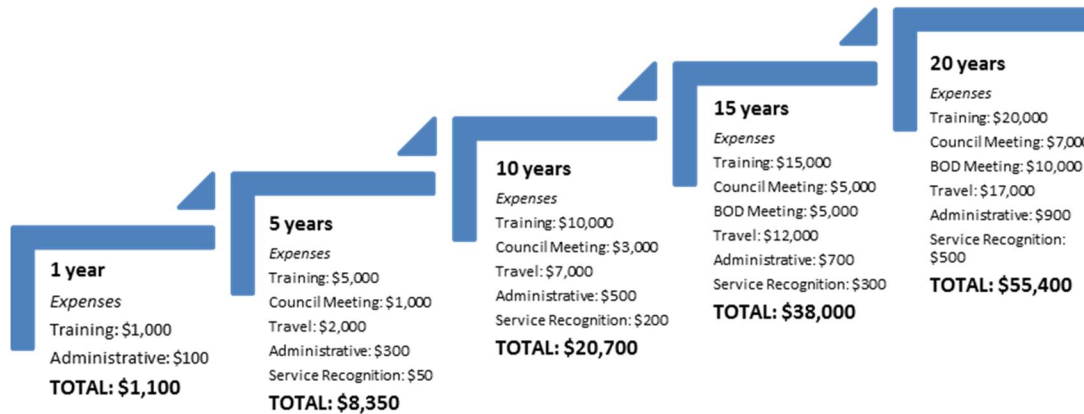
Figure III: SDT Volunteer Years of Service

Years of Service	# of Volunteers
less than 1 year	20
1-5 years	40
5-10 years	12
10-15 years	10
15-20 years	7
20+ years	15

The initial cost of bringing in new personnel is not substantially higher than retaining existing members, as a comprehensive training program does not currently exist. However, the loss of a

volunteer with 5 years of experience poses a significant cost to the organization, both financial and developmental.

Figure IV: SDT Career Ladder Cost Analysis



Even more costly is the maintenance of inefficient volunteers. When a member of the National Council has disengaged from the organization and neglects her responsibilities, it takes a remarkable toll on the chapters she supports, as well as the Society as a whole. Over the past decade, SDT has doubled their paid collegiate services staff to supplement volunteer appointments.

Figure V: Leadership Consultant Cost Analysis

Leadership Consultant Data	2004	2014
# of Employees	2 FT, 1 PT	6 FT
# of Chapters	57	63
# of Colonies	3	1
Salary	\$59,000.00	\$140,000.00
Travel	\$52,000.00	\$124,800.00
Meals	\$16,250.00	\$39,000.00
Administrative	\$3,000.00	\$6,000.00
TOTAL	\$130,250.00	\$309,800.00

Under-supported chapters perform significantly worse than chapters with a strong local advisory board and a positive relationship with the National Organization. All seven of the 2014 *Diamond Award* winners, who represent the top 10% of collegiate chapters, have a dedicated on-site volunteer providing a high level of support. Conversely, over the past two years, there has been a 100% increase in the number of groups placed on a probationary status by either the SDT Board of Directors or University Conduct Boards. None of these groups have had consistent National support prior to their sanctions.

The number of individual collegiate complaints, as compiled through the annual Chapter Services survey and periodic visit reports, has also increased. Many undergraduate women feel that National representatives do not have the ability to provide the support required and are often unable to adequately assist with chapter issues. As expected, grievances expressed by volunteers have also been witnessed at increasing levels. Members have cited lack of support, insufficient training, and unmanageable workloads as reasons for becoming disconnected from the organization.

A preliminary investigation conducted by the organization through a strategic planning initiative has uncovered the following issues:

1. The identity of the SDT volunteer is vague, especially in the 1-5 year range. National Council members are not provided with clear enough guidelines or expectations to be effective in their roles. If job parameters have been communicated, there is often a lack of follow through or constructive feedback.
2. A formalized training program for new volunteers does not exist. Individuals are not adequately prepared to manage basic chapter issues and must resort to a 'trial by fire' style of learning. Continuing development for the 5-10 year range is also lacking, leading to disengagement and eventual attrition.
3. Sigma Delta Tau has not taken advantage of available technology to streamline processes and provide necessary resources to volunteer staff and collegiate chapters.
4. Communication issues among the various subsystems of SDT have resulted in inefficiency and low morale amongst council members.

Ideal State

1. All members of the Sigma Delta Tau system; undergraduate, alumnae, and professional staff would be provided with honest expectations and guidelines. With their identity clearly defined, they would be better connected to the organization and more effective in their individual roles.
2. A systematic training program for new volunteers would be implemented and supplemented with continuing education for returning National Council members. With extensive knowledge on how to support their chapters and formalized best practices, volunteers will feel comfortable in their respective roles and collegians will receive the support they require.
3. The organization would take advantage of current technology resources, including cloud based solutions, video conferencing, and sophisticated database products. By providing the most updated resources and making them accessible to all appropriate personnel, the organization becomes more efficient and generates substantial cost savings.
4. With improved communication methods, top to bottom, individual performance would improve and overall morale would increase, resulting in higher volunteer retention rates.

In order to achieve these desired results, a needs assessment is required to pinpoint the gaps between the current performance and the ideal conditions. Following approval of the plan, a needs assessment will be performed to uncover the underlying causes and identify some possible solutions.

Feasibility

Resources

The proposed needs assessment can be conducted by utilizing Sigma Delta Tau’s available resources, supported by an individual Instructional Design professional. Data will be collected through a series of questionnaires, online surveys, in-person/telephone interviews, and focus groups. Given that most of the participants are volunteers, costs will be kept at a manageable level, but the assessment will provide a plethora of robust data. The Instructional Designer assigned to the project will lead a team of three internal volunteers; the Volunteer Retention Chairman, a Chapter Services Coordinator and the Board of Directors member responsible for Strategic Planning. Over the course of this assessment, Sigma Delta Tau will be holding two of their annual conferences, the Boards of Directors Meeting and Leadership School/Advisor Training, allowing the ID team to conduct focus groups and in-person interviews, without incurring additional costs. Questionnaire and survey data collection will be facilitated by the SDT National Headquarters staff as part of their daily responsibilities.

Organizational Culture

The Sigma Delta Tau Board of Directors, National Council and Headquarters Staff are supportive of the needs assessment, as a whole. There may be some difficulty obtaining individual buy-in, but given the value of the project and the number of stakeholders involved, those in favor far outweigh those who would be opposed. As this is an organization founded on tradition, change is never easy, but all parties understand the necessity of an in-depth assessment to resolve the retention and engagement issues.

Cost/Benefit Analysis

The long term benefits of the needs assessment will far outweigh the costs of the project. As previously mentioned, most of the participants are volunteers for the organization. When individual contributors are properly trained, engaged and functioning at an optimum level, their cost to the organization is relatively low. However, when a volunteer becomes disconnected and supplementary support is required, the price to maintain their area of responsibility increases dramatically.

Figure VI: Individual Volunteer Cost Analysis

Indv. Volunteer Cost Analysis	Effective/Local	Ineffective/Remote
Administrative	\$25.00	\$50.00
Travel	\$0.00	\$1,000.00
Annual Meeting	\$1,500.00	\$1,500.00
Advisor Training	\$1,000.00	\$1,000.00
Regional Conclave	\$0.00	\$500.00
Consultant Support	\$500.00	\$1,000.00
BOD Intervention	\$0.00	\$1,000.00
TOTAL	\$3,025.00	\$6,050.00

By identifying and addressing the current needs, Sigma Delta Tau stands to cut their chapter support budget in half (see Figures IV, V & VI).

The total projected cost for the needs assessment is \$6,500.

The estimated pricing includes a salary for the Instructional Designer, who will lead all data collection initiatives with support from the volunteer committee, including:

- Development of all surveys/questionnaires
- Facilitation of focus groups/group interviews
- Facilitation of individual in-person/telephone interviews
- Examination of performance metrics, training documents, and other related materials
- Analysis of data and compilation of the needs assessment report

Figure VII: Needs Assessment Cost Analysis

Needs Assessment Requirements	Estimated Cost
Salary (\$20/hour X 8 hrs. per week; 6 months)	\$3,840.00
ID Travel (BOD Meeting & Leadership Conf./Adv. Training)	\$1,500.00
Volunteer Committee Travel*	\$0.00
Mailed Questionnaires	\$50.00
Email Survey*	\$0.00
Telephone Interviews*	\$0.00
In Person Interview/Focus Group Materials	\$25.00
Final Presentation of Needs Assessment	\$600.00
Miscellaneous	\$485.00
TOTAL	\$6,500.00
*Expenses would be incurred regardless of NA project	

Timeframe

The needs assessment will take approximately 6 months to complete; start to finish. The extension of the time it would normally take to complete the project has been protracted to include the integral meetings of decision makers (BOD Meeting) and performers (LS/Advisor Training).

Figure VIII: Needs Assessment Timeline



This estimate includes the time required to collect/analyze the data and compose the final needs assessment report.

The Plan

Objective

Through a comprehensive needs assessment, the ID team will be able to identify gaps between the current state and the ideal conditions. Specifically, they will determine how much of the performance gap is the result of volunteer ineffectiveness and how much can be attributed to lack of resources. The team will also identify key priorities and develop a corrective action plan with the intention to close the gaps. This suggestive plan will include training/development requirements, instructional materials and methods, and proactive measures to manage future retention or engagement issues.

Target Audience

The two groups of focus include:

- Decision Makers: Board of Directors & Executive Director
- Performers: Advisors (chapter support) & Cabinet (program development)

Sampling Procedures

The team will employ a stratified sampling method to ensure all chapter demographics are represented. Advisor selections will be randomized within five categories; Diamond Award winners, Rising Star Chapters, groups on Probation/Supervision, Special Status Chapters and New Chapters/Colonies. Cabinet subjects will be selected from within the various areas of expertise.

Through a series of interviews with key stakeholders, both decision makers and performers, the team will have the opportunity to solicit feedback from nearly 100% of the population.

In order to garner external input and best practices, the team will send a questionnaire via certified post to the National Headquarters of the 26 NPC women’s fraternal organizations. They will also conduct phone interviews with the Executive Directors of two similarly aligned Greek letter organizations.

The following table illustrates the Sigma Delta Tau subsystems and adjacent systems to be included in the needs assessment:

Figure IX: Sampling Groups & Methods

Sample Group	Method	Number & (% Sampled)
Executive Director	In-Person Interview	1 (100%)
Board of Directors	In-Person Interview	11 (100%)
Cabinet	Telephone Interview	20 (60%)
Advisors	In-Person Interview Email Survey	60 (25%) 60 (100%)
Chapter Services Coordinators	In-Person Interview	7 (100%)
Recruitment Team	Focus Group	1 Team Leader (100%) 8 Coordinators (100%)
Collegiate Leadership Team	Focus Group	12 Chapter Reps (100%)
NPC Organizations	Mailed Questionnaire	25 Executive Directors (100%)
Industry Experts	Telephone Interview	1 ZBT Executive Director (100%) 1 AEP Executive Director (100%) 64 Director of Greek Life (10%)
Collegiate Chapters	Email Survey	64 Chapter Presidents (100%)

Data Collection Methods

The ID team will utilize several methods of data collection, including; in-person and telephone interviews, focus groups, mailed questionnaires, online surveys, and indirect examination.

- Interviews: In an effort to speak with all interest groups (Executive Director, BOD, Cabinet, Chapter Services Coordinators, and Chapter Advisors) within the organization, interviews will be scheduled to solicit feedback from a large percentage of key stakeholders. Through these conversations, the ID team will be able to gain a better understanding of volunteer knowledge and skills, effectiveness of current training procedures, a comprehensive picture of the current organizational culture and what sort of obstacles they face.

- Focus Groups: Group interviews will be conducted with both the National Recruitment Coordinators and the Collegiate Leadership Team during the leadership training sessions/meetings in February. These group meetings will provide the necessary information for the assessment, within a framework of time and cost savings.
- Mailed Questionnaires: Formal questionnaires will be developed and sent to the National Panhellenic Council sororities' respective leaders. These surveys will be used to gain a broad understanding of best practice models utilized by other organizations of similar scope.
- Online Surveys: Through use of Sigma Delta Tau's authorized survey generation platform, the team will be able to solicit anonymous feedback from collegiate chapters, as well as Advisory staff not contacted through the interview process.
- Review of Processes/Procedures: All current processes and procedures will be reviewed through indirect examination, including database management, communication tools, training programs, and volunteer assessment protocols.

In addition, the Instructional Designer will be facilitating interviews with several external experts, including other fraternal Executive Directors and University personnel, to gain an understanding of best practices for volunteer engagement within the industry.

Instruments & Protocols

The first month of the project has been dedicated to the development of interview guides, questionnaires, and surveys specifically tailored to the goals of the SDT needs assessment.

The ID team will follow strict protocol during the entirety of the assessment and will work directly with Sigma Delta Tau leadership throughout the process. All insights collected through this study will remain confidential and will be treated as proprietary information. No data collection will occur outside the parameters of this plan without expressed approval from either the SDT National President or Executive Director.

Implementation Procedures

As detailed in a previous section, the needs assessment will occur over a span of six months (see Figure VIII). The items included in the implementation plan can occur consecutively, simultaneously, or out of order; if the alterations are in the best interest of the assessment.

- **November:**
 - Discuss Needs Assessment Plan with Sigma Delta Tau leadership
 - Conduct a preliminary review of current processes and procedures. Determine what, if any, needs assessment work has been explored in the past and what the results of prior analyses were
 - Indirect examination of database management, communication tools, training programs, and volunteer assessment protocols

- Debrief the Assessment Team (Volunteer Retention Chairman, Chapter Services Coordinator, Strategic Planning Chairman, HQ Staff) and set clear protocol for operation
 - Identify members to be sampled within each subsystem
 - Develop all necessary questionnaires
 - Develop online survey through existing SDT platform
 - Compile subject contact information for Mailed Questionnaire/Email Survey
 - Schedule Telephone/In-Person Interviews
 - Begin first round of telephone interviews with Industry Experts
- **December:**
 - Mail questionnaires to NPC Executive Directors
 - Distribute survey via email to all Collegiate Chapter Presidents and Chapter Advisors
 - Conduct telephone interviews with Cabinet Members
 - Continue telephone interviews with Industry Experts
 - Attend Board of Directors Meeting and conduct in-person interviews with the Executive Director and BOD
- **January:**
 - Follow up on questionnaires sent to the NPC Executive Directors
 - Collect data from email surveys sent to Chapter Presidents/Chapter Advisors and determine if additional follow-up is necessary based on the response rate
 - If required, send a follow up email to encourage subject participation in electronic survey requests
 - Complete telephone interviews with Industry Experts
 - Continue telephone interviews with Cabinet Members
- **February:**
 - Attend Leadership School/Advisor Training and conduct in-person interviews with Chapter Services Coordinators and selected Advisors
 - Facilitate Recruitment and Collegiate Leadership Team focus groups
 - Collect data from NPC questionnaires
 - Complete telephone interviews with Cabinet Members
- **March:**
 - Conduct follow-up interviews to obtain clarification on responses, if necessary.
 - Collect final data from questionnaires/email surveys
 - Compile results of in-person/telephone interviews and focus groups
 - Analyze data collected
- **April:**
 - Write final summary and a comprehensive report of key findings
 - Present findings to key stakeholders (Board of Directors/Executive Director), including recommended solutions.