



Financial Transparency Facilitated Discussion Guide

Workshop Facilitation Instructions

As you prepare to facilitate this workshop, first familiarize yourself with this entire document. Then, identify a room or virtual space that will meet the needs of your group and the activities identified, select your supporting personnel, gather all needed resources and prepare the materials.

The success of this workshop is in your hands!

Document layout

- *Italicized* words are instructions for you, the facilitator.
- **Highlighted** words are the parts of the facilitation guide that you should read aloud to participants.
- [Brackets] indicate where you need to customize the text you are reading aloud.
- Times listed next to each section are guidelines to complete the workshop in the time identified.
- Facilitation questions used within this guide are suggestions. You can change the questions and narrative to reach the objectives within the activities.

Workshop Logistics

This workshop is for facilitation with potential new members in their recruitment counselor groups but could be adapted to be a larger group activity for College Panhellenics with fewer than 100 potential new members. When planning, adjust the room size and the number of groups accordingly to ensure that participants find the activities meaningful. Don't forget to adapt the materials to match the number of groups or members.

Learning objectives

- Potential new members will be able to identify their own financial needs.
- Potential new members will be able to ask relevant financial questions to chapters during recruitment.

Time

30 minutes

Recommended participation

- Maximum of 50 participants
- One lead facilitator

Room set up

- Chairs in half circle or classroom style

Materials

- Flip chart
- Markers
- Paper and writing utensil for each participant

College Panhellenic Finance terms (5 minutes)

I want to make sure you all feel comfortable understanding the wording that you will hear from chapters regarding their finances.

Utilizing the Financial Transparency Form, allow potential new members a few minutes to read through the terms. Then as the facilitator, highlight two-three terms that are specific to your campus and how they are interpreted or defined.

After reviewing these terms, what questions do you have?

Determining your Individual Priorities (25 minutes)

All of us come into recruitment with differing priorities and identifying your unique financial priorities as well as your priorities when joining an organization will help you find a chapter that is best suited for you. I'm going to write up on our flip chart as you all shout out, the things you are excited about participating in as a sorority member.

Help the group brainstorm the things they are excited about, perhaps its philanthropy events, intramurals, formals, informal or formal sisterhood events, etc. Feel free during brainstorming to add some things you love that they may not think of like being a "big sister" or going to other organizations events in the community.

Thanks for this brainstorm. You may be wondering what this has to do with finances, but I promise I'll tie this together for you.

Now that we've got this list up here, I want you to spend some time doing reflection. I'd like you to grab your notebook and as I read questions aloud, jot some notes down on your specific financial situation and priorities. There are no right or wrong answers here, this is for you to think through what is most important to you and what your financial priorities are. You will not be sharing these out loud, these are just for you to reflect on.

Read each question aloud and give a minute or so in between for them to write. You can alter questions or remove ones that don't relate to your campus experience.

- Are you working to pay for your sorority dues, or do you have assistance?
- Are you planning on studying abroad or doing an internship off campus at some point?
- Are you interested in living in the chapter facility or would you prefer to live elsewhere?
- Are you someone who will want to participate in most or all of the things sorority life has to offer or would you prefer to pick and choose what you pay for or participate in?
- Are you able to pay dues up front or will you need a payment plan?
- What other organizations do you hope to participate in outside of a sorority?
- Do you have academic or athletic expectations that are required of you to keep scholarships?
- What other financial commitments do you have currently?

Now that we've done this exercise and you've had the time to think through what you are looking for in a sorority experience and what your financial priorities are, it's time to think through what questions you may have for a chapter based on your priorities. For example, if I want to study abroad, I might want to ask each chapter a question about what dues would look like during that semester. If I know I'm most excited to participate in intramurals I might ask if there are extra costs associated for registration or apparel.

Take a few minutes with a partner and come up with two to three questions that might be helpful to

ask chapters during the process. You can think of ones specifically for your situation, or questions simply related to what we brainstormed as a group. Take five minutes and we will come back.

After five minutes have the pairs share out questions that they came up with and encourage potential new members to take note of questions that interest them. Below are some sample questions that you can offer to them as well.

- *Is there a financial commitment to be a big sister? If so, what is the average cost?*
- *What types of optional apparel or merchandise does the chapter buy throughout the year?*
- *What is the cost to participate in other organizations philanthropies?*
- *Does the organization offer scholarships? If so, how many go to this specific chapter?*
- *What is the process if don't want to live in the facility?*
- *What do members do on the weekends for fun that might cost extra?*
- *Will I get fined for missing events for work/athletics, family, class, etc.?*
- *What are my options if I run into financial hardship or my circumstances change?*
- *How do you/members of the chapter pay your dues or manage finances?*
- *What happens if I'm late on a payment?*

All of these are great questions to consider as you visit each chapter throughout recruitment. We encourage finding a sorority chapter that is the best fit for you and I'm hoping that spending some time reflecting today and brainstorming questions will make you feel more comfortable and confident having these conversations. Chapter members will be expecting these questions as well from you, so don't be nervous! They want to make sure you find the right fit as well and should be able to guide you through what you can expect as a member of their chapter.