

Leading Strategic Change Through Assessment and Budgeting

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Fraternity/sorority professionals rarely have all the resources they need, but by reexamining the ideas that guide how those resources are allocated, we can get more out of what is available.

More than Money

Before making resource decisions, remember that the budget includes more than money. It also includes allocations of physical space, virtual space, the time and energy of staff and stakeholders, and material assets.

It is highly probable that by examining how you use your time each day, week, and/or month you should be able to make adjustments to eliminate things that are not necessary and/or are not contributing toward your goals. For example, if you aim to address risk management issues stemming from social events, you might think about attending conduct meetings with student leaders and conduct officers to help facilitate conversations about values and managing risk as they are discussing a relevant, current example. If you address community behavior head on, collaboratively, and in a way that provides coaching to student leaders, you may see a substantial change in the frequency and severity of incidents. The only resource used is time.

Rather than doing it all yourself, consider using community partners to provide programs, support systems, and additional resources. Police academies can often teach self-defense, crisis response agencies can lead workshops on sexual assault and relationship violence, and often these groups are looking for ways to get their messages to wider audiences. Are there other campus committees willing to develop a program for you? Are there graduate students practicing assessment who need initiatives to study? By changing the way we work with people, we can easily increase our capacity without exhausting existing resources.

New Rules

The phrase, “ideas that guide how resources are allocated,” can be simplified into one word: strategy. Strategies are rules that an organization consistently uses to make daily decisions about its objectives, finances, priorities, services, operations, and more.

Finding the best strategy requires starting with better questions. Asking, “what things should we do,” produces a list of misguided solutions looking for problems, such as those in the left column below. To invest your resources more wisely, and to do more impactful work, start with a different question: “what problems are we trying to solve, and what is the best way for our

community to solve them?” Examples from various institutions are listed in the right column to illustrate the difference.

Common Strategies	Better Strategies
<ul style="list-style-type: none"> ● Do what has been done before. ● Make everyone slightly happy. ● Do what the students like. ● Replicate what peer institutions are doing. ● Emphasize [insert topic] this year. 	<ul style="list-style-type: none"> ● Use stakeholders to build support systems. ● Improve the pathway to leadership. ● Eliminate trivial administrative routines. ● Empower innovators to reposition the norm. ● Improve and accelerate accountability mechanisms.

Imagine using these two sets of rules to decide how to invest your time, energy, money, and other resources. It should quickly become clear that adjusting the initial question can lead to a much more intentional set of strategies for the community.

When we as fraternity/sorority professionals benchmark our work against comparable programs across the country, we tend to add the “typical” things: honor societies, leadership programs, speakers, peer education, etc. However, many of the things we think we should be doing are not relevant to the cultural issues dragging the community down, so it would be irresponsible to put resources into them. We can become much better at making strategic choices by focusing on the changes we want to make instead of the things we want to add to the community’s “offerings” of programs and experiences.

Assessing Priorities

Even with unlimited resources, it is impossible to solve every problem. We need something to help us prioritize what gets attention, and assessment provides the answer. Simply put, assessment is a process of learning how to do better work. It exposes gaps between goals and performance. It helps identify the primary causes and contributors responsible for those gaps. And it indicates which efforts best improve results. In short, it helps answer our strategic question, “what problems are we trying to solve, and what are the best ways for our community to solve them?”

Assessment allows us to examine the returns on the things that receive the most time, money, and energy. What are we working on that is (or is not) helping us achieve our goals? What partners in our network are we not utilizing to our benefit? Is our advising model useful or would another approach better reach our students? Are we giving the most important issues what they need to be successful? For example, if we meet with each chapter president one hour per month, what is the impact on the community’s larger goals? Should we revisit that investment?

The answers to these questions provide insight into how well we are transforming resources into progress towards our goals. As a result, we can adjust the rules we use and therefore make better use of our resources.

Compounding Resources

What if you only invested resources in initiatives that you knew for sure would produce triple the return or whose impact would last for multiple years? How would you organize your work to protect and nurture that investment?

Consider the example of budgeting \$5,000 and one week of your time and energy to send ten students to regional conference. If this was your single greatest investment of the year, how would you generate an entire year's worth of results from it? How could you expand its reach to 100 students? How might you achieve comparable results, sustained over multiple years, with only 10% of that budget?

This example reveals multiple levels of progressively greater return on your resources depending on how you invest:

- Resources in: results out.
- Resources into many small, comprehensive, coordinated initiatives: greater results out.
- Resources in, cultivated regularly: maintain results over a longer period of time.
- Resources in: increased capacity (sustained ability to produce greater results from the same resources) out.
- Resources in: new additional resources out.

Although this should be common sense, this breakdown makes it blatantly clear that ongoing, coordinated investments into cultivating new resources and building capacity are much wiser than putting everything into one-time experiences.

Perhaps your community is struggling academically. How might you use existing (possibly under-utilized) campus resources to help individuals and chapters be successful? You might ask a colleague to train scholarship chairs. You may even find a person or office with the capacity to meet with individuals for more specialized attention. There may be faculty members who have shown interest in connecting with the fraternity/sorority community and who would make great scholarship/faculty advisors.

If your strategies require expertise you lack, it might be worth investing in professional development. You might consider attending a new summer experience, a specific conference, or a webinar related to another functional area, such as conduct or academic advising, to better serve in your role. You can ask your colleagues who work in those areas to tell you about future professional development experiences they become aware of, or to point you to specific literature on a topic in their area.

Towards Better Budgeting

By shifting our thinking about the nature of resources, the role of strategy and assessment in our work, and the multiple levels of investment, we can learn to make much better use of the limited resources available to fraternity/sorority professionals.

Improving your resource-to-impact ratio does not require reassessing or overhauling everything. It starts by incorporating these lessons in small ways:

- Write down the rules you use to make daily decisions and determine if they are guided by the right question.
- Pick one initiative or allocation and examine how you might get more out of it.
- Categorize how you use your time, energy, finances, materials, and space according to your guiding ideas and decide whether a reallocation is in order.
- Look for opportunities to create synergy among existing initiatives.
- Use the investment breakdown above to brainstorm opportunities to generate capacity and new resources.