



## About the Release Figure Methodology (RFM)

RFM began in 2003 with 10 pilot campuses. The methodology is based on a mathematical model to determine the number of invitations issued by each participating chapter in the recruitment process. The purpose of RFM is threefold:

1. Maximize the number of potential new members (PNMs) who ultimately affiliate with a sorority through recruitment.
2. Allow each PNM to methodically investigate realistic options and ultimately match with a chapter for which she has a preference among those options.
3. Enable each chapter to invite a sufficient number of PNMs to each event round to match to quota at the conclusion of recruitment.

## RFM by the Numbers

Since implementing RFM, we have seen placement of the average open house pool (OHP) of PNMs grow to a high of 80.5 percent for all campuses, compared to the old law-of-averages formula, which yielded a significantly lower percentage of OHP matched. At the same time, the overall number of chapters matching quota or close to it has grown significantly.

Generally under RFM, 85 to 95 percent of PNMs are matched with their first preference on their membership recruitment acceptance binding agreement (MRABA). This percentage is a key statistic that NPC tracks for each campus.

RFM data from 2017-18 indicates a decline in the OHP of -2.9 percent compared to the previous year. The percentage of OHP matched is 79.9 percent for the 2017-18 year. This reflects a -.3 percent decrease from the number of women pledged during the same period in the previous year. In addition, colonizations resulted in more than 3,600 women pledged as there was a significant decrease in extensions.

Today, more than 495 campuses use RFM. These campuses employ either a fully structured or a partially structured recruitment style and typically have three or more NPC member organizations on their campus.

Sixty-six volunteer RFM specialists make up the RFM team, which represents 25 NPC member organizations and includes organizational council/board members, NPC delegation members, organizational staff, inter/national volunteers and fraternity/sorority advisors (FSAs). These women have undergone extensive training on RFM implementation and have pledged their support and cooperation to maintain a Panhellenic perspective in their work.

## RFM Works

Campuses and chapters using RFM see these benefits:

- A higher percentage of chapters pledge quota.
- PNMs who complete recruitment in good faith and maximize their options are matched.
- Panhellenic chapters achieve parity (all chapters are approximately the same size), which leads to a stronger Panhellenic community.
- PNMs can focus on chapters they have a real opportunity to pledge.
- Chapters can focus on PNMs they are interested in pledging.

RFM works best when the individual chapters follow the invitation and flex recommendations that the RFM specialist gives them. However, there may be times when a chapter and its inter/national organization decide to make intentional membership selection decisions that involve not following the exact carry figures given. When these exceptions are made, the organization must communicate in advance to the RFM specialist, so she can make accommodations in the RFM invitation projections.



## RFM and Invitations

It is within the rights of each chapter and organization to determine its own criteria for membership. No chapter should be forced to invite women it does not wish to affiliate, and the College Panhellenic cannot penalize a chapter for following its own selection criteria. As soon as any chapter knows it will not be offering a PNM an invitation for membership, it should discontinue inviting her to recruitment events, even if this puts the number invited below the chapter's carry figure. It is unfair for any PNM to be invited to events by a chapter that has already decided to release her.

However, inviting fewer women than the carry figure issued, or "underinviting," is discouraged. Doing so jeopardizes a chapter's chances of matching to quota, and pervasive underinviting in the community will jeopardize overall retention. If a chapter underinvites by a significant amount, the RFM specialist will notify that chapter's inter/national organization.

Continued support and cooperation are needed to ensure timely submission of invitation lists and other requests for information to the College Panhellenic. Submitting invitation lists late is not acceptable and affects the entire Panhellenic and the RFM process. Some chapters do not care about fines or late fees, but tardiness delays the processing of data for the next round and disrupts the personal/professional schedules of the RFM specialist and FSA. Chapters should be familiar with their internal organizational scoring processes and software to avoid late submission of data.

## Total

With RFM, we have seen chapters stabilize and on most campuses have seen the overall sizes of chapters increase. To allow chapters to achieve parity as quickly as possible, NPC policy states total will be automatically adjusted every regular academic term. This is to be done no later than 72 hours following bid distribution in the academic term that primary recruitment is held and within one week (no more than seven days) from the start of the academic term(s) in which primary recruitment is not held. The adjustment will be to median chapter size unless the College Panhellenic adopts an acceptable alternative method according to the NPC Manual of Information. For campuses on a trimester or quarter system, the College Panhellenic will automatically reset total during the primary recruitment term and in one additional term as approved by a vote of the College Panhellenic and placed in its governing documents.

College Panhellenics can use one of the following methods to determine total:

- Median chapter size
- Average chapter size
- Largest chapter size (recommended for College Panhellenics with three or fewer chapters)

The method used to determine total should be stated in the College Panhellenic recruitment rules; not the College Panhellenic bylaws.

Adjusting total every regular academic term (i.e., fall and spring terms) allows for the most accurate reflection of true Panhellenic size. It also takes into consideration retention and mid-year graduations.



## Alternate Total Setting Pilot

Given concerns regarding campus and chapter growth and the impact the adjustment of total may have on growth and the ability to encourage further community growth, selected campuses have been invited to participate in the **Alternate Total Setting Pilot**. Frances Mitchelson, Panhellenics chairman, in conjunction with the NPC area advisor for the campus, will determine and suggest a campus' participation.

**Campuses considered for participation are divided into the following “buckets” based on specified criteria:**

- **Bucket one:** Two-chapter campuses where automatic total reset, even to largest chapter size, impacts community growth.
- **Bucket two:** Campuses with two to five chapters with small quota and/or small enrollment.
- **Bucket three:** Mid-sized campuses with six to nine chapters with declining quota and/or declining enrollment.
- **Bucket four:** Campuses with large quotas and large chapter sizes where total is very high (mega-chapters).
- **Bucket five:** Smaller campuses, possibly with new chapters and often not with a fully structured recruitment, that do not use Release Figure Methodology (RFM).

**Once approved for participation in the Alternate Total Setting Pilot, the primary communication will be between the total consultant and the campus team for implementation. About the team:**

- **Total consultant:** Selected NPC volunteers who are experienced leaders and/or work with RFM but are not assigned as that campus' RFM specialist.
- **Campus team:** NPC area advisor, fraternity/sorority advisor and College Panhellenic president (or designee). Fraternity/sorority advisor and College Panhellenic must agree to and support participation in the pilot.

During the 2017-18 academic year, 47 campuses participated in the Alternate Total Setting Pilot.

## Quota

In RFM, an initial quota estimate and a quota range are calculated using the size of the OHP, the number of chapters participating in recruitment and the College Panhellenic's historical recruitment-retention rates.

The quota estimate and quota range are re-evaluated during each round of recruitment. After preference or the final event round for a campus, chapters submit their bid lists. All chapters should submit their bid list in ranked preference order. All PNMs who attended a chapter's preference round must be included somewhere on its bid list. It is important chapters follow their organizational policies as to the placement of legacies on their bid list. Campuses using hand bid-matching systems are given a number to compile their first (or A) bid list in alphabetical order. All remaining PNMs who attended that round are placed on the chapter's second (or B) bid list in rank order.

After receiving all signed MRABAs and studying the matching results for each option in the quota range, the FSA and RFM specialist determine quota by mutual agreement. Quota is not determined in advance of the preference round.

All women who maximized their options in recruitment and attended all recruitment events during the process but who are not matched in the bid-matching process are placed as quota additions.



## Importance of Flex Lists

A flex list is actually two lists of PNMs — a plus list and a minus list. These are used to help optimize the invitations issued by all sororities. Flex lists are powerful tools that enable the RFM specialist to ensure the number of PNMs returning to each chapter's events most closely approximates the targeted return number, based on how many PNMs the chapter needs for a successful recruitment outcome.

The RFM specialist draws from a plus list if a chapter does not perform as well as expected. Similarly, she draws from the minus list if a chapter's performance exceeds expectations. Chapters that receive a minus list request from the RFM specialist are required to submit one.

Plus lists cannot be mandatory, because in no case can a chapter be required to invite women it does not wish to affiliate. The College Panhellenic cannot fine or penalize a chapter for not submitting a plus list.

Chapters that underinvite and/or do not provide plus flex lists risk not matching to quota.

**Placing legacies on either flex list could present problems for a chapter with regard to its legacy policy if a legacy is either added or released during the flex process.**

## Upperclass (Secondary) Quota

Some campuses find the use of an upperclass (or secondary) quota valuable when a significant number of upperclassmen are interested in recruitment, and/or the campus historically matches a low percentage of upperclass PNMs.

The College Panhellenic, in consultation with the RFM specialist and NPC area advisor, must vote to approve implementation of an upperclass quota before recruitment begins.

Once a Panhellenic votes to establish an upperclass quota, individual chapters may not opt out of accepting those women without having consulted their inter/national organizations, the FSA and the RFM specialist before recruitment begins.

Upperclass quota is not the answer for every campus, but it is advantageous in circumstances when it will help place upperclass women who traditionally have not been placed through the recruitment process.



## Recruitment Format

Using the RFM recommended recruitment format (maximum number of events a PNM can attend each round) is vital to the success of RFM on a campus. In order for the RFM carry figures to work effectively, there should be an even (or close to even) release structure throughout recruitment. For example, on a campus with six groups, an event format of 6-4-2 allows for a decrease by two events in each round.

If the difference cannot be even, the first release should be the smallest. For instance, on a campus with five groups, the event format should be 5-4-2. Using the correct format is especially critical for chapters with mid- and high-relative recruiting strength (RRS) factors because they need to release many more PNMs in the first invitational round.

If your campus has added or lost a chapter since your last primary recruitment, a format change is required and should be determined in consultation with your RFM specialist and NPC area advisor. Campuses using RFM can only use approved RFM formats. A vote of the College Panhellenic is not required to approve a new recommended format.

Beginning fall 2018, all campuses with 19 or fewer chapters will move to a 2-party preference format. Historical data has demonstrated overall PNM retention is higher using a 2-party preference round format and more PNMs are placed with their first choice, which accounts for higher satisfaction by the PNM in her matched placement.

## RFM Communication and Responsibilities

### RFM specialist

- Works with the FSA on RFM-related matters throughout the RFM process.
- Recommends to the College Panhellenic and FSA any necessary format (event progression) changes as suggested by the RFM model. Recommended format changes should be implemented!
- Copies the area advisor on initial RFM correspondence with the campus.
- Follows up with the area advisor at the conclusion of recruitment to give her the overall recruitment results and issues that need to be addressed.
- Prepares and distributes the total summary report to the area advisor within 24 hours of the completion of recruitment.
- Shares any general concerns/issues with the area advisor that may have been discussed with or raised by the FSA during recruitment.
- Communicates with a member organization's RFM contact and/or NPC delegate if a chapter is not following suggested invitation numbers or flex numbers and/or if the chapter is experiencing a sudden change or concern related to recruitment performance.

### Area advisor

- Has regular communication with the College Panhellenic and FSA on Panhellenic operations, answers questions and advises on campus situations.
- Responds to any action required regarding the results of primary recruitment (e.g., a vote for extension).
- Receives an updated total summary immediately after recruitment and responds/counsels the College Panhellenic on required action to automatically reset total.
- Advises on all judicial-related matters.

### NPC delegate

- Communicates with the RFM specialist if her organization's chapter will use any special strategies that would affect the number of women invited to rounds of recruitment.
- Ensures her organizational contacts respond in a timely fashion to requests/issues raised by the RFM specialist during recruitment, since such matters often need immediate attention.