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### Personal Action Learning Plan (PALP) Paper

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Leadership

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### **PALP Part One**

Over the course of my college career, I have been involved in various leadership positions with my sorority, Zeta Tau Alpha. Currently I am the Vice President of Membership, which entails planning for formal recruitment, membership retention and working with members that decide to remove themselves from my organization. Throughout my time in this sorority, membership retention has always been an issue. Although many factors related to retention are out of the executive board's control, there are areas in which change can allow for members to want to make their situation work to stay involved. The areas such as sisterhood events, philanthropy events, social events and leadership opportunities are important to help maintain members, especially relating to the value they feel they are receiving in return for paying dues. Within the start of the year, four members have decided to relinquish their membership, while I am working towards obtaining new members, the loss of any member still has an effect on my chapter. New members often join during their freshman year as they are looking to make friends and be a part of an organization. As time goes on and those members progress into their junior or senior year, many choose to relinquish their membership due to more rigorous academics, internships or sports. The retention of members is critical in furthering my organization here at Merrimack College and to continue fostering strong relationships.

In order to boost retention, the main objective is to make the events and required activities more accessible to all members. Every girl in the chapter has a different situation,

which highly affects their ability to attend events and feel connected to the chapter overall. With my own experience being a commuter and an on campus student, there are significant differences in how connected I feel. Currently as a commuter, my availability is extremely limited and significantly decreases my free time. With this insight, one goal would be to make my sorority more accessible for those commuting or with a lot on their plate. In order to do so, gathering information about all the members will be necessary to help create a plan of action. Another area that my chapter is slowly improving on after the results of the pandemic, is more off campus events. The members of my chapter pay a reasonable amount of money, which goes to things like sisterhood events and social events. The lack of these during the pandemic resulted in many girls feeling that they were not getting enough value from my organization. The increase in these types of events will be beneficial to show the value that both new members and existing members receive. The promotion of these events and my support to continue developing more ideas can assist members in feeling that they are getting their money's worth. Lastly, the bylaws of chapter have been rewritten relating excused absences and fines. As a member of the committee that changed them, they were written to be more positive and less as a punishment. With the enforcement of these new bylaws, hopefully the chapter will feel more inclined to attend requirements with a positive attitude. The goal to improve retention relates to all areas of the organization and requires the assistance of the entire executive board.

With my remaining three months on the executive board, I plan on making membership more accessible to everyone. By gathering data and using factors I already understand, steps can be put in place to achieve this goal. Towards the end of the semester I hope to have impacted a few of my members in a positive way. Once my term is over in December and transitions occur, relaying this information can help continue to make change happen even when I have graduated.

Small changes across the board can make a huge difference in the accessibility and alleviate some stressors members may be having due to their busy lives. In order to see if any major changes are working, hopefully the amount of girls relinquishing their membership decreases or the responses on the exit form change. Currently the exit form, which is a part of the relinquishing process, has many responses stating they do not have time or see value anymore. Using this information and the overall number of members staying can demonstrate if any changes are being productive. Membership retention is a major concern of mine and has been since joining the executive board my sophomore year, with select changes over time membership levels can improve.

### **PALP Part 2 (5 & 6)**

With the task at hand a transformational leadership approach would be best suited for undertaking the accessibility issue. With this issue spanning far before my time as the Vice President of Membership and will most likely be an issue to some members long after my term ends, the need to look to the future is evident. Providing the foundation to make my sorority more accessible to its members will allow for future VPs to plan accordingly in hopes of maintaining membership. The transformational approach also includes elements of individual consideration, intellectual stimulation, charisma and inspiration. A high level of focus will be spent on individual consideration, as everyone faces different circumstances that should be taken into account. Intellectual stimulation should also be present, since new ways of doing tasks and new outlooks can help solve this ongoing problem. Lastly, charisma and inspiration are necessary to create a vision and cause others to work towards a common goal of overall making our chapter better and full of high quality members. With the chapter's need to make changes for the future, transformational leadership will help achieve this goal.

The creation of an action plan will include the use of multiple surveys to capture data related to individuals' thoughts, opinions and schedules in order to best plan for the future and accommodate their needs. In the past I have utilized a chapter check in survey as a way to get anonymous feedback regarding activities and other elements related to my sorority. I would like to send out another one of these on the 7th of November. This survey would allow for all our new members to contribute their thoughts and ideas, along with active members who have a good understanding of how things are run. Previously, I received a few responses on a new member expectations survey, many of which described their passions for participating in philanthropy. With this knowledge, I knew that the new members would be very excited as our chapter had a breast cancer walk, Think Pink week and a partnership with Kendra Scott coming up. Developing a survey for chapter members to complete relating to their schedules and activities can help determine when the best times for events are and can rationalize why certain members are absent. Surveying members is one of the best ways to utilize individual consideration, as this method allows me to take a look at factors that can be changed in the future. Understanding members' commitments for next semester will be important for the next executive committee to make plans that work for the majority of the chapter and not just what works best for the one planning the event. Allowing for plans to be distributed earlier as well will help members make accommodations on their own schedules as well. This second survey will take place within the upcoming weeks, after data collection for the first was conducted and discussed with the executive board. Overall the use of surveying members is one of the first steps that will provide a large amount of insights related to members own circumstances and can be analyzed to make positive changes for the future.

Following the data collection and analysis portion of the action plan, training and implementing the next Vice President of Membership will be essential in improving my sororities membership issues. Currently, my sorority is undergoing the election process, which takes roughly two weeks to complete. Afterwards the newly elected executive committee will undergo training with the outgoing officers, attend a training conference out of state and work with a leadership consultant. During my training with the incoming officer I plan to go over all the data and information collected in order to create a plan with this new officer on how to make membership more accessible and boost retention. Discussing ways to implement accommodations for select members depending on their circumstances next semester will be a great start. The Vice President of Membership position has a bulk of the role taking place during the summer and fall semesters to ensure that primary recruitment is successful. This structure provides the incoming officer with time to work on accommodations and build relations with all the members. Many members are not aware that accommodations can be made due to their circumstances. The main reason I am able to be absent from meetings and do calls rather than in person meetings is because I advocated for myself and used my previous EC knowledge to know this was possible. During the training days I plan to discuss my overall experience and needs for the chapter with all incoming officers, especially as membership involves the assistance from all officers. Demonstrating the importance of a united front and working together as an executive board is critical for reducing membership losses and making members feel they are getting value from the chapter.

Overall the combination of data collection and proper training for the next Vice President of Membership will be critical in setting the chapter up for success in the future. Due to the history of this issue, resolving the problem will take some time and cooperation from all

stakeholders involved. A transformational leadership tactic is essential in inspiring the next group of leaders and fully utilizing individual consideration. The action plan will involve multiple surveys, analysis and meetings with both current and incoming executive members to ensure the prosperity of the chapter and our members.

### **PALP Part 2 (3 & 4)**

Over the course of the semester, I had the opportunity to complete multiple surveys and tests to further my understanding of who I am as a leader. The 360 survey and the MBTI test provided the most insights into my personality and my peers' thoughts on myself. The emotional intelligence test resulted in an overall score within the low average category, which for individuals included in my age range makes sense. Within the two major sections, I scored better with strategic elements over the experiential ones, especially in relation to using emotions. In comparison to the rest of the class, my scores presented as average, except for the using emotions area. Overall I feel as though I do not show a high level of emotions to others and tend to keep my feelings to myself, even when this may not be helpful for my situation. I also prefer to adjust my behavior to others in order to accommodate their needs based on how I perceive their feelings. These insights demonstrate my need to work on better utilizing and prioritizing my own emotions in order to improve my overall wellbeing and performance. The utilization of the 360 survey provided a high level of insight, specifically on my leadership styles and abilities. In regards to the OCEANs elements based on my own perceptions, I scored very low on extraversion and high on conscientiousness. The high levels of conscientiousness is highly relevant to my personality, as I am highly organized, dependable and aim for high achievements. Within the leadership styles, my evaluators claimed I had high levels of task oriented and relations oriented leadership, with both scored at a 4.65. Due to the nature of my position these

two styles work well together to ensure members feel looked after, along with all the planning and workshops I managed for primary recruitment. My evaluators also believed my overall performance and effectiveness was on the higher end of the scale, with all aspects being above a four. The highest of those included trust at a perfect score and satisfying others at a 4.88. These numbers were slightly higher than I previously expected, but demonstrate that I am making change for my organization in ways I cannot even grasp. The 360 survey was highly successful in demonstrating how others see my leadership in a positive manner and their reliance on me to effectively solve problems.

Lastly, the MBTI assessment was taken as a way to understand our tendencies based on selected criteria relating to interactions and perceptions. With this particular assessment, participants can often receive different results when taken at various points in their lives. The last few times I have taken this assessment, I have received the same result of an ISTJ personality type. Throughout the various skills testing, I have consistently demonstrated introverted tendencies and high avoidance to confrontation. Upon further analysis, many of the strengths associated with this personality apply to myself, including being responsible, practical and dutiful. While many of the strengths are true, the weaknesses also appear to also be true. I am often very stubborn about how I prefer to complete tasks and my opinions on particular topics. I also tend to blame myself for failed tasks, especially with the high standards I place on myself. The description of the ISTJ personality type within the workplace also appears to describe myself well, due to characteristics of being hard working, enjoyment of clearly defined rules and tasks, along with being able to complete tasks in multiple different areas. Overall I resonate with the personality type I received after completing the assessment, as many of the characteristics match up with my tendencies quite well.



Prior to completing the leadership assessments, my perceptions of my own characteristics varied from the way I presented myself to others. One of my most evident characteristics to both myself and others includes my organizational skills and ability to complete tasks. Organization has always been something that I love and feel confident in my skills in this area. My use of calendars, spreadsheets and color coding ties into my organizational processes that I feel add value to myself. Another area that I do feel confident in is my ability to complete tasks in a successful manner. I feel this characteristic was demonstrated through multiple categories within the 360 survey that my peers completed, including meeting others needs, satisfying others and proficiency. While I saw these characteristics within myself, I do not understand the extent that others felt I possessed these characteristics. My levels of confidence overall are on the lower end, especially in more confrontational scenarios. The directive aspects of leadership are often hard for me, as I prefer to take tasks on in their entirety on my own to reduce conflicts. In close relation, I also prefer to do this as I know the task will be completed up to my own high standards. While I am still learning and becoming aware of my own tendencies and characteristics, the completion of these assessments has helped demonstrate more of my positive areas that I cannot often see.

My leadership skills and actions have had a large impact on my chapter over the course of my time as a member. Each and every member within my sorority is a stakeholder in relation to feeling a value associated with maintaining their membership status. Every member provides something to the chapter and helps maintain the friendships created between each other. Due to many of these close relationships, all members need to feel that the sorority is accessible in order to help reduce negative feelings throughout the chapter. Within my sorority members are classified into a few different groups including new members, general members, program council

officers and executive committee officers. Due to the officers status as stakeholders, they benefit from their own actions and work to improve the sorority as a whole through position specific tasks. As officers, many of our positions have an advisor associated with them to further our chapter and get an outside perspective. These advisors are alumni members of Zeta Tau Alpha, who volunteer their time to support our chapter. Our advisors also act as stakeholders, their assistance is crucial in completing the chapter's goals and maintaining membership. Going further, the Zeta Tau Alpha International Office can also be classified as a stakeholder. The International Office provides many resources, hosts leadership training, conventions and plays a significant role in operations. While there are many different stakeholders present in relation to making membership more accessible, the active members within my chapter have the largest impact on reaching this goal.

The chapter is overall supportive of making improvements, especially when these improvements are intended to benefit them. The members within this organization tend to desire more social events, sisterhoods and philanthropy activities due to their passions. These members are also constantly stepping up to help in new positions and committees in order to help achieve goals and add their own mark on the chapter. My current initiatives have been successful in receiving responses on the many surveys I have sent out over the course of my term. With their core interest in finding value in the chapter, these girls want their voices heard and to have a say in how the leadership team makes decisions. While the executive board has many standards both from the International Office and Merrimack College, our members' opinions are highly valued and considered when creating events, including mandatory ones. My own interests are highly peaked in all areas of planning, as my focus is primarily on membership as a whole. While I am limited on time, I have the opportunity to guide the incoming officer to better understand the

problem at hand. Within my last few weeks as Vice President of Membership, I am striving to find ways for future officers to tackle the retention problem and make members feel valued.

### **PALP Part 3**

Elements from the action plan were implemented over the course of a few weeks, including membership data collection. The chapter check in survey was sent out the 7th of November and members had the opportunity to fill this out during our weekly meeting. After receiving all the data, I moved the results to a spreadsheet and highlighted comments from members. The data was made available to all of the executive board to use in order to improve their own positions. The results of the survey demonstrated that many members needed a reminder on how mandatory events work and the background on how much work each executive member puts into creating these events. Members also stated their desire for more philanthropy events, especially seniors who had seen previous large scale events that happened prior to Covid-19. Lastly a few members had more personal issues that they addressed on the anonymous survey. With the knowledge that these things are happening, the chapter president will be making an announcement to let all members know they can reach out to us about these problems. During the executive board meeting, the president has created a list of things that will be addressed to reduce confusion and reinforce expectations.

The action plan also included a second survey in order to better understand each individual member's own circumstances. This survey was distributed over the Slack channel, which is used for communication with the entire chapter and our advisors. Members have been filling out this survey, this included information retaining to their majors, anticipated graduation, extracurricular activities and living arrangements. During my training session with the incoming Vice President of Membership, I detailed how this information can be utilized to better the

chapter and understand the reasoning for members actions. With the list of majors, our Academic Chair can create groups to help members study, select classes and better get to know each other. The anticipated graduation date is important for overall planning to ensure that our panhellenic total is as high as possible and to accurately reflect when members have graduated. The use of extracurricular data can allow for our organization to partner with more clubs at Merrimack College. Extracurricular activities including work, internships, clinicals and student teaching can also help determine why members are busy and cannot make it to our events. The incoming VP of Membership understands how important it is to consider that each member has their own situation going on and may need specific accommodations. I explained how these accommodations can greatly impact a member's decision to stay in the chapter and can make or break their experience. The use of this data collection was highly beneficial to better understand the chapter and their individual needs.

During the training with the incoming Vice President of Membership, many different elements were discussed in relation to membership accommodations. The training overall went very well and I feel this incoming officer will do a great job in this position. While I cannot physically make all these changes, I am confident that with this foundation laid down she will be able to make this a sustainable practice. With all the officers transitioning, this allows for the new officers the best time to make drastic changes and receive a better outcome with our members. Typically drastic changes mid semester do not go over well with our chapter, especially in relation to attendance and requirements. Due to this rationale, I believe that the best time to implement these changes would be at the beginning of next semester with the incoming VP of Membership. While I was able to complete the data collection and training as planned, I am unable to implement major structural changes as I will be graduating and no longer in this

position. I have reminded the incoming VP of Membership that I am always available to discuss anything with, especially as the timeline for her out of state learning academy has changed.

During my term, Zeta Tau Alpha hosted an Officer Learning Academy at a hotel in Virginia the weekend before Thanksgiving. This year the incoming officers will be attending this learning experience in January, after their position term starts. Due to this change of timeline, I expect to be providing some assistance during the first couple weeks of the semester. Overall the data collection and training went according to plan and has improved my confidence in our organization growing for the better.

Throughout the process of developing an action learning plan and uncovering my own leadership styles has provided me with a better understanding of how to use my strengths for success. One major takeaway from working with my executive board and even at my current job, is that I should have more confidence in my abilities, as all of my team members believe I can accomplish so much. The feedback through the 360 survey was very insightful and made me feel like my contributions were more valued and necessary for the improvement of my organization. Those results also demonstrated that I do have relationship oriented leadership skills, with my lack of task delegation, I suspected this area would not be as high as it was. While I typically score very high in relation to completing tasks, I often focus on smaller tasks in order to check them off my list. The smaller more immediate tasks were often my primary focus when they arose, causing me to procrastinate the bigger picture items. Due to the unpredictable nature of many of these issues, I found myself having to focus my efforts on those as soon as possible to get them resolved. In relation to my ability to complete tasks, I often procrastinate my tasks to the very end as I know that I can complete them. The combination of the 360 survey and my own knowledge about my habits, has demonstrated that my success with task completion correlates

heavily with my decisions to procrastinate my work. This understanding will be highly beneficial in the future for planning out large scale tasks and over scheduling in an efficient manner.

In the future, if I was able to go back to the start of my term as Vice President of Membership, I would have done things differently. I would have liked to work more on retention during the spring semester of 2022 and utilized the transition of power better. During the transition of executive boards, this is the best time to implement new changes. Members are highly resistant to change during the middle of the semester after all the rules have been outlined. Starting with more data collection during last semester would have been beneficial to start working on the issue significantly earlier and allow me to implement major changes during the fall semester. Creating a plan in the spring would have benefited our members, while allowing me to plan accordingly for primary recruitment. While I wish I was able to start working on this issue earlier, I feel that it was necessary for the chapter to finally get a real semester since Covid-19 happened. Now that the chapter is operating at a normal level, the new executive board can work to uncover more of the underlying issues that were not impacted by the pandemic. Another major element I would have liked to incorporate includes staying focused on the larger picture. I feel as though I was distracted by smaller individual issues and primary recruitment, which highly occupied my time. Creating an abstract timeline and sharing this with my executive board would have been beneficial in keeping me on track. This would have created a deadline and reduced the amount of procrastination that could have occurred. Although I would have liked to begin this action plan early on in my term, I feel as though I was able to learn a lot during my time as Vice President of Membership that would have been critical for developing an action plan.

While my time as a collegiate in Zeta Tau Alpha is coming to an end shortly, I have the opportunity to enhance my leadership skills through other avenues. I plan on joining the Zeta Tau Alpha alumnae chapter located in MA, this chapter has an executive board similar to the one I currently am on. Within ZTA, there are also opportunities to become advisors for local chapters, which in my case currently would mean my current collegiate chapter. Depending on if there is an opening in the near future, I would be interested in taking on a role as an advisor. While these positions are currently not an option for me at this time, I can utilize other opportunities in my life to improve upon my leadership skills. At my current job that I have been working at for five years, I am now considered a trainer. This entails providing new team members with the skills needed to succeed in their position. Overall this opportunity highly impacts my confidence levels, which need to be strengthened significantly. Continuing to train new employees will allow myself to see how much I truly know and gain more confidence in myself. With these interactions I can also strengthen my communication skills, especially in regards to providing feedback. Providing negative feedback has always been a task I have shied away from. However when training new team members, they need to fully understand their tasks and position and feedback is essential to their success. Becoming a trainer also allows me to work on distributing the workload to others more often. Although I am capable of completing all of the work tasks more efficiently than a new team member, I must allow them to try things on their own. Work distribution has always been a weakness of mine, as I tend to value control over the task at hand. In the near future I hope to land a team lead position at my current job, this would heavily focus on task delegation and daily goal setting for the team. This type of position would also highlight and improve my planning and organizational skills, as there are many moving parts throughout the day that I would need to focus on. In the future I plan to strive to improve upon my

leadership skills relating to communication and task delegation through avenues at my current workplace.

The use of the action learning team was impactful through the different insights relating to the current issue within my organization. As the members of my action learning team had previously not experienced fraternity and sorority life, I was able to get a viewpoint from completely unbiased participants. Due to their distance from the issue, I was able to more concretely develop the problem statement, which led to a more defined action plan. The interactions with the team were also beneficial in order to discuss issues and not receive biased information. While Zeta Tau Alpha is a part of fraternity and sorority life, many organizations on campus operate in a similar fashion, allowing my action learning team to provide their own insights relating to my problem statement. The utilization of the action learning team was beneficial during the early stages of planning and allowed for insightful discussions.