# Surge FAQ

## The Process

**Q: What is the Surge Process?**
A: [Watch this short video](#) to learn about Surge!

**Q: When does the Surge Process begin? What is the timeline?**
A: Recruitment is year round! However, Surge will begin at the end of the previous term - this is when you will receive your Chapter's Dashboard. At that point it is expected that you begin planning for the next term's Recruitment.

All required information is expected to be filled in at least two weeks before your first event. Your webpage will be created and first email sent one week before your first event. If needed sooner, please email recruitment@phisigmapi.org.

**Q: How can I make Surge work with my current Recruitment process?**

A: Surge is meant to supplement, not replace,  your current Recruitment process. We recognize that every campus is different and each Chapter has different tools and opportunities. Email recruitment@phisigmapi.org about how you can utilize or customize Surge to support Recruitment success.

**Q: As Recruitment Advisor, what is expected of me during this process?**

A: The Recruitment Advisor is the primary contact within the Chapter during the Surge process. These are the expectations of the Recruitment Advisor:

1. Maintain contact with National Staff. This includes responding to comments on the Dashboard, responding to email and answering/responding to phone calls. Quick communication is very important during this process.
2. Learn and be knowledgeable about the Surge process and Dashboard. If you do not know how to do something, it is your responsibility to reach out to your Surge Contact and find out.
3. Provide details about your Recruitment Schedule as well as provide a list of Potential New Member email addresses for the Recruitment Emails.
4. Ensure that Potential New Members sign in at all of your events and mark attendance (see *Marking Attendance*).
5. Mark which Potential New Members are eligible for a bid, which receive a bid and which get pinned. If they didn't get a bid or get pinned, provide notes explaining why.
6. Complete a review of the Surge/Recruitment process to improve for next term.

If a Recruitment Advisor fails to meet these expectations, the Chapter President will be asked to step in.

**Q: I'm the new Recruitment Advisor for my Chapter and I am not familiar with Surge. How can I learn more?**

A: New Recruitment Advisors are encouraged to view all resources available on phisigmapi.org/surge. You are also encouraged to setup a virtual meeting with the Director of Chapter Services (chapterservices@phisigmapi.org) to go over your Dashboard and answer any questions you may have. At the start of semester, we offer two informational webinars about the process for your benefit. It is your responsibility to learn and be knowledgeable about the Surge process so that you may better serve your Chapter during Recruitment.

**Q: When does the Surge Process end?**

A: The process is completely finished once your Chapter has its Pinning Ceremony. Within a week after Pinning, your Chapter should have completed the following:

1. Marked attendance for all Invitational Meetings and Recruitment Events (ideally should be done during or right after each event).
2. Marked who was eligible to receive a bid, who received a bid (ideally should be done right after bids are distributed) and who got pinned.
3. Completed the *Recruitment Review* tab. Your Surge Contact will make this available after your last event is held.
4. Filled out any notes on the *Attendance* tab as why Potential New Members did not receive a bid or, if they did receive a bid, did not accept it. This will benefit you as you begin Recruitment next term.

Your Surge Contact will fill in all review information on the *Overview* tab to lead a discussion with your Chapter Consultant on your Chapter's Recruitment performance.

**Q: I have feedback on the process - who do I send it to?**

A: At the end of the process you will be asked to give feedback on the process via the *Recruitment Review* tab (hidden until Recruitment is over). If you would like to discuss this feedback with a staff Member, you may contact the Director of Chapter Services by calling the National Office or emailing chapterservices@phisigmapi.org.


# <mark>The Dashboard</mark>


**Q: Who is allowed to have access to my Chapter's Dashboard?**

A: Your Chapter Consultant, Surge Contact and the Director of Chapter Services automatically have access to your Dashboard. It will first be shared with the Recruitment Advisor. Then it is up to the Recruitment Advisor to share the Dashboard with the appropriate Chapter Members, which is up to their discretion. We encourage it to be shared with any Members who have a hand in Recruitment.

**Q: How do I use the Checklist tab?**

A:  The Checklist tab is a way for your Chapter to plan the work that needs to be done in order to have a successful recruitment and divide the work amongst your Members. The "Surge" section includes everything that needs to be done for the Surge process. The items in yellow are your responsibility and must be done in a timely manner. The items in gold are the

responsibility of your Surge Contact. Anything else below the Surge section can be edited and amended to make it fit your recruitment process.

Once you have the task finalized, fill in the person responsible and tag them if need be so they know they were assigned a task. Be sure to include a deadline. The person responsible should update the status and include relevant notes so everyone knows how that task is coming a long. If that person were to no longer be able to complete that task, another Member should be able to pick right back up and know exactly what has been done by the status and notes.

**Q: How do I use the PNM List tab?**
A: There's a principle in business: it costs less to keep a customer than it does to acquire a new one. The PNM List takes advantage of those who have already shown interest in joining Phi Sigma Pi.

If your Chapter had RSVPs from last term in your Dashboard, they have been transferred over to the PNM List of this Dashboard. PNMs who were Inducted and PNMs who graduated or will graduate this coming term, have been removed. If attendance was marked, it has been noted how far they went through the process and if notes were included, we transferred them over to this list. If you remember something of the PNM that you did not record in the Dashboard, you should go through and add those notes.

Your Chapter should send personal invitations to this list, via email, text or in person, for your upcoming recruitment. These are PNMs who have already said "Yes, I am interested in this organization," but were unable to go through the process for one reason or another. In your invitation, recognize that they have already shown interest, tell them you want them to be the first to know about your upcoming events and invite them to meet up with you to discuss Phi Sigma Pi and answer any questions they might have. If you would like to discuss further how your Chapter could utilize this tab, email recruitment@phisigmapi.org.

**Q: How do I fill out theSchedule tab?**
A: The cells in yellow are the parts that you must fill out in a timely manner because your Surge Contact will need them to create your webpage, RSVP form and email. Use the example in D:10 to fill out the details of your Recruitment. Remember that constitutionally, you are required to hold at least two Invitational Meetings. Once you have filled those out, it's important that you tag your Surge Contact so they are aware that the information is ready. *Important: We do not know when your Recruitment will start until you fill this information out. Failure to tag your Surge Contact may result in the process not starting in a timely manner, which can have an effect on your Recruitment. It is your responsibility to make your Surge contact aware of your recruitment dates.*

In column G, you will find a place to include any requirements, in addition to the national requirements, for joining. If a PNM must attend a certain number of events or have a higher GPA, we want to be sure to communicate that on your webpage and emails.

**Q: How do I mark attendance on the Attendance tab?**
A: Completing the attendance tab will allow you to track a PNM's journey through your recruitment process. As Recruitment Advisor, you should always know who has been involved in your recruitment and to what extent. Knowing who has attended an event and collecting their contact information allows you to make personal connections and follow up with PNMs. For every Invitational Meeting and Recruitment Event that you hold, you should mark attendance. The best way to do this is to have a computer setup at your welcome table and ask every PNM who comes in through the door to sign in by filling out the information. You could also have a Member verbally ask them for the information and then type it into the sheet. Then, mark that they attended that event by placing an "X" in the appropriate column for the event. If a PNM has already attended an event, you will not have to fill in their information again, simply mark them for that event with an "X." Feel free to create a seperate spreadsheet to sign Members in and then mark attendance after the event into the Dashboard.

After all of your Recruitment Events have come to an end, you should go through and, based on your requirements for joining, mark who is eligible to receive a bid. Then, mark who has been offered a bid and finally, mark who you pinned. This will give you a great visual on your PNMs' journey through your recruitment and will allow you have a detailed PNM List for next term.

**Q: How do I leave a comment in the Dashboard to let my Surge Contact know that I have changed something?**
A: Anytime you change important information or want to notify your Surge Contact of something, you should leave them a comment. This can be done by highlighting the particular cell/s, right clicking and selecting "Insert Comment." You can then tag your Surge Contact by typing a plus sign and then their email (Ex: "+sparker@phisigmapi.org). This sends an email notification to the person tagged. You may also include a question or any notes in the comment box. Note: If you leave a comment but do not tag the intended recipient, they will not see the comment.

**Q: Why can't I change the information in my Dashboard?**
A: All Recruitment Advisors should have access to edit the Dashboard. If you do not, please reach out to your Surge Contact. If you are not the Recruitment Advisor, please reach out to your Recruitment Advisor to get edit access.

There are instances where your Surge Contact will lock certain cells to ensure that the information does not change without them knowing (such as Recruitment event information). If you need to change that information, please leave a comment with the requested change and your Surge Contact will change it for you.

**Q: Am I allowed to change the Dashboard? Such as adding tabs or moving them around?**
A: Yes, you may customize your Recruitment Dashboard in a way that makes sense to your Chapter, however, you may not make changes to the formatting/organization of the *Overview*, *Schedule* or *Attendance* tabs. If you go to "View" and then "Hidden Sheets" on your Dashboard, you will find a few sheets that have been premade for your Chapter to utilize if you wish (*Recruitment Review* will be unhidden at the appropriate time and used by all Chapters). You may also add additional tabs that will support your Chapter in planning and executing your Recruitment.

**Q: What happens to our Dashboard when Recruitment is over?**
A: Your Dashboard will remain in your Chapter Folder on the Drive for you to review whenever you need to. Every term your Chapter will receive a fresh new Dashboard.

# Recruitment Emails / PNM Lists

**Q: When are the Recruitment Emails sent?**
A: Your first Recruitment email will be sent one week prior to your first event. Your second Recruitment email will be sent two days prior to your first event. In instances where this timeline is not possible due to waiting on a PNM List or event information, we may only be able to send one Recruitment email.

**Q: Will I get to see the Recruitment Emails before they are sent?**
A: Yes. If time allows, your Surge Contact will email you a test of your Recruitment email 24 hours in advance of its scheduled date. It is your responsibility to reply in a timely manner if any of the information needs to be edited. If you do not reply, your Recruitment email will be sent at its scheduled time as is. You will not get tests of the reminder or follow-up emails sent to RSVPs, but can view the emails on the [Resource Center](#).

**Q: What if I can't get a PNM List from my campus?**
A: If you cannot get a PNM list from your school administration, *[click here](#)* for a list of other options.

**Q: Is my Chapter allowed to send our own Recruitment emails?**
A: Chapters are strongly encouraged to have the National Office send Recruitment emails through the Surge process on their behalf. In the event that the Chapter feels it is best to send their own Recruitment emails, such as an issue due to spam, they may do so. It's important that Chapters who send their own Recruitment emails include the link to the RSVP form in their email with a strong call to action to RSVP. We ask that Chapters send us a test of their email to proofread and let us know how many emails are being sent.

**Q: Will my Surge Contact send out special emails such as advertising only my Recruitment events or letting PNMs know if an event has been cancelled?**
A: Your Surge Contact will send additional emails only in the instance of an emergency, including cancelling because of bad weather or room/time changes. These instances should be avoided whenever possible. If a Chapter wishes to advertise their Recruitment with more than the two scheduled emails, they are encouraged to do so using their own email accounts. The National Office is cautious about sending too many emails within the Recruitment period because it increases the chance of being flagged as spam.

**Q: Will my Surge Contact send out reminder and follow-up emails?**
A:  Every PNM who RSVPs through the form on your webpage will receive a simple reminder email the day before and a follow-up email, with links to resources on the website, the day after the event. If you have concerns about this, please email [recruitment@phisigmapi.org](mailto:recruitment@phisigmapi.org).

We encourage Chapters to do their own personal follow-up via phone, text, Facebook message or face-to-face as well.

# Webpage / RSVP Form

**Q: What is my Chapter's webpage url?**
A: Your Chapter webpage url is phisigmapi.org/schoolname. The school name is generally the shortened nickname for your school or what is used in your email address. For example, Temple University would be phisigmapi.org/temple and the University of Nevada Las Vegas would be phisigmapi.org/unlv. Your Surge Contact can tell you the exact url if you have trouble.

**Q: How do I request changes to my Chapter webpage and how frequently will it be updated?**

A: Chapter webpages will be updated with new Chapter contact information and Recruitment event information as soon as it is provided in your Dashboard. If you see an error or need to request a change to the information, email recruitment@phisigmapi.org.

**Q: Can I add pictures or text to my webpage?**
A: Chapters are able to submit a form to request the addition of pictures and/or a Chapter "blurb." This form is linked in the Checklist tab of your Dashboard. No requests will be accepted after the due date and the form will reopen the following term. Header images may not be changed on the webpage due to the importance of having a high-quality image.

**Q: What is the purpose of the RSVP form and how should I utilize it?**
A: The RSVP form gives you an insight into how many PNMs to expect at each event as well as creates a stronger commitment to the PNM attending. Anyone who RSVPs will receive a reminder email the day before their chosen event as a courtesy to remind them of the event.

Your RSVP form will be located on your Chapter webpage and will be advertised in your Recruitment Emails. It is important to encourage PNMs to RSVP to your Recruitment events! Include your webpage link in all Recruitment advertisements and include a call to action for PNMs to RSVP.

Another good practice is to have a laptop set up at all tabling/PR events. Encourage PNMs to RSVP for your events right then and there so they don't forget to do it later.

You can see how many people RSVPed to each event on the *Overview* tab of your Dashboard in column I starting at row 8. Click "RSVPs" right above that to see the full list of students who RSVP'd. This sheet is linked to the RSVP form so it's important that you do not try to edit it or the link will be broken.

**Q: Can I request additional questions to the RSVP form?**
A: You may request additional questions within reason. Asking a PNM to fill out too many questions will discourage them from filling it out altogether. Ask your Surge Contact if you would like to include an additional question.

**Q: Where can I see how many RSVPs my Chapter got and what the submissions say?**
A: RSVPs are collected in a separate GoogleSheet. We have linked the *Overview* tab of your Dashboard to that sheet as a way to see how many RSVPs you have for each event and where PNMs are hearing about your event. Click the "RSVPs" header (H:8/I:8) to view your RSVP sheet with all of the information on those who submitted an RSVP.

**Q: Something is wrong on my RSVP form or it is not showing up on our webpage. What do I do?**
A: Call the National Office or email recruitment@phisigmapi.org and we will ensure that the form is working properly and has the correct information.

## Surge Contact

**Q: How do I get in contact with my Surge Contact?**
A: If you don't know your Surge Contact's email address, you can always get in touch with them by calling the National Office at (717) 299-4710 or emailing [recruitment@phisigmapi.org](mailto:recruitment@phisigmapi.org).

**Q: How is my Surge Contact different from my Chapter Consultant?**
A: During Recruitment, your Chapter Consultant will:
1. Support you in planning your Recruitment events
2. Ensure that your Recruitment Schedule is organized for a successful Recruitment
3. Assist in communicating with campus administration as necessary
4. Aide in getting a list of Potential New Member emails by communicating with the Registrar or other campus conctacts at your request
5. Check in periodically to ensure that Surge is working for you
6. Reach out if the Surge Contact is having trouble getting in touch with you

During Recruitment, your Surge Contact will:
1. Lead webinars and be available for virtual meetings to ensure that you are informed on the entire Surge process
2. Create all of your Surge materials including your webpage, RSVP form and Recruitment emails
3. Ensure that you are fulfilling all of your responsibilities including filling out your *Schedule* tab and marking attendance in the *Attendance* tab
4. Answer any questions that you have about the Dashboard or the Surge process

If you are ever unsure who to reach out to, you can call the National Officer or email recruitment@phisigmapi.org.

**Q: When is my Surge Contact available?**

A: Surge Contacts work out of the National Office in Lancaster, Pennsylvania and are available Monday through Friday from 8:00 AM ET to 4:30 PM ET. You may email your Surge Contact off-hours, but you are not guaranteed a response until they are in the office. If you need urgent Surge/Recruitment assistance off-hours or if your Surge contact is unavailable for an extended period of time, you are encouraged to call the Director of Chapter Services (717-842-0878).

# Recruitment Best Practices

**Q: Should my Chapter use a theme for Recruitment?**
A: It's suggested that Chapters use the ideals, mission and Tripod of Phi Sigma Pi as their theme, planning events that focus on and exhibit who we are as a Fraternity. Other themes can cause distraction, deter certain groups of PNMs from participating and/or incorrectly communicate the Phi Sigma Pi brand. Regardless, we strongly caution Chapters from using any theme that is copyrighted, such as movies, books or television shows.

**Q: What sort of marketing materials are most widely used during Recruitment?**
A: Some options for marketing materials are posters, fliers and tabletents. Bookmarks can also be used as well as digital displays (if your campus has them). You can download pre-made marketing materials at phisigmapi.org/surge. Want to design your own? You can also find our official Recruitment logo at phisigmapi.org/surge.

Always remember to represent Phi Sigma Pi by using the branded terms. Phi Sigma Pi does not condone the use of "Rush." Please use "Recruitment" in all of your advertising. Be sure to check that everything says "Phi Sigma Pi National Honor Fraternity" and not "Honors" and that you list us as "gender-inclusive" and not "co-ed."

When advertising for Recruitment, we do recommend the use of "Member" instead of "Brother." A PNM not familiar with our type of organization might see "Brother" and automatically think social fraternity. As you get deeper into Recruitment and PNMs begin to understand the lingo, you can switch back to "Brother."

**Q: What are some unique ideas for advertising events on campus?**
A: Besides traditional postering and tabling, here are a couple of ways to advertise your recruitment events on campus:
● Utilize paid social media ads on Facebook, Twitter and Instagram if your budget allows it.

- Do a simple giveaway, such as a flower, pen or hot chocolate packet, with a tag attached that has all of your recruitment event information.
- Research the various newsletters sent out by the school or different departments and ask to be included in them.
- Hold an event at the very beginning of the term that is open to the entire campus, such as a field day or service project. At the end of the event, talk about your upcoming recruitment and hand out fliers with the information on them. You can do this at the end of the previous term as well!

Be sure to research all of the resources available to you on your campus! You might be surprised at the different opportunities you have to advertise on your campus.

**Q: What are best practices for advertising Recruitment on social media?**
A: A Facebook event is a great way to advertise recruitment when it's done right. Be sure to give details for all of your events and tell PNMs to RSVP on your webpage. Have Members get involved by inviting EVERYONE they know on campus to the event. Keep PNM excited and informed by posting in the event. Posts could range from informational posts about Phi Sigma Pi, reminders when events are coming up and fun facts about your Chapter.

When posting on any social media platform, remember that visuals are important. Posting your Chapter's recruitment flier with a lot of text on it may get passed by very easily. Collect pictures of your Chapter throughout the last year. Post a lot of pictures and include all information in the text portion of the post.

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**Q: How can I get the whole Chapter involved in our Recruitment?**
A: Recruitment is everyone's job, and there's a way for everyone to help out during Recruitment! Here are a few ways:

- Ask the entire Chapter to provide a list of classmates, teammates, etc. that would make a good Member. You can ask them to add the emails to a list or ask them to send a personal email to the PNM themselves.
- Find your creative Members and ask them to help with marketing/advertising by creating materials and distributing them.
- Members who work with your school's event management can be great resources for booking rooms.
- There is a lot that Members can do during Recruitment events, such as greet PNMs, manage the tables, buy the snacks, share their Phi Sigma Pi story, etc. There is a hidden tab in your Dashboard called *Volunteer Sign Up* where you can organize all of this. Go to "View" and then "Hidden Sheets" to find it.

**Q: What are some ideas for successful Recruitment Events?**
A: Chapters are constitutionally required to hold two Invitational Meetings/Information Sessions. These events should inform the PNM on who Phi Sigma Pi is, what the requirements are of joining, what is expected of them if they become Members (financial and time commitments, etc.) and what it looks like to be a Member of Phi Sigma Pi.

Recruitment events are less formal and informational. They are your chance to display Phi Sigma Pi's ideals and really get to know the PNM and see if they have the potential to make a good Member. When planning these events, think of the [Characteristics of an Ideal Brother](#) and how you can plan events that would allow PNMs to demonstrate these characteristics. Great events to hold would be:
- Any kind of service event. Casual service events such as HOBY Hug making or dog-toy making are a great opportunity to converse with PNMs while sharing our ideal of service.
- Team events. These are a great way to see how the PNM works with others and how they deal with setbacks. Also a great way to build camaraderie between Members and PNMs.
- Facilitated networking. "Speed dating" is a great way to get to know PNMs. Casual socials are easy to plan, but can be a bust if Members and PNMs don't actually mingle. Facilitated networking ensures that everyone participates and gets to talk to everyone.
- Professional development workshops. Ask a staff or faculty member at your school to lead some sort of professional development workshop. It could be something like resume-writing, how to network or how to dress professionally. This shows your dedication to the PNMs' professional and leadership success.
- Scholarship events. A favorite among Chapters is "Show and Tell." This is where Members choose something to teach and present on it for 5 minutes each. PNMs not

only learn something new, but they learn what the Members are passionate about and find Members with shared passions to connect with.

Regardless of the event, it's important to name it in a way that makes sense. A PNM should understand what type of event it is and what they will be doing just by the name. Put yourself in the shoes of the PNM… would you go to an event with that name? Does it make sense?

If you have questions about whether something would make a good recruitment event or not, email recruitment@phisigmapi.org.