

# 2020 National Volunteer Virtual Leadership Retreat

## *(DRAFT as of 6/11/20)*



Welcome to the first virtual National Volunteer Leadership Retreat. This retreat is comprised of three separate sessions over a course of three months. The content has been customized specifically for volunteers leading in today's ever-changing environment. The sessions will be virtual and leverage the Zoom platform with a combination of large group gatherings, small breakout sessions with <10 people, interactive exercises using pulse technologies and sharing from multiple presenters and facilitators. The content and topics for each session are subject to change based on environmental/changing needs of the Fraternity. We hope that this three-month journey will prepare our volunteer leaders for a year never experienced before.

### **Session One: July 11, 2020; 1:00 p.m. – 4:00 p.m. EDT**

#### **I. Welcome and Introduction – Tricia Smith, Grand President**

Tricia will provide a state of the Fraternity and discuss expectations during these changing times.

#### **II. Managing the Next Normal**

The Next Normal is our way of approaching the ever-changing times. The language of a 'next normal' is being deployed almost as a way to quell any uncertainty ushered in by the coronavirus. With no cure in sight, everyone from politicians and the media to friends and family has perpetuated this rhetoric as they imagine settling into life under this 'new normal'. Where we are, however, is unknown. Information is constantly changing. Our Next Normal is a set of 2-3 months at a time, where we must understand the current expectations, over communicate to maintain social relationships, measure the results and then pivot to the next chapter. In the first session, we will explore leading in the Next Normal. As leaders you must:

- Expand your ability to pivot and set expectations.
  - We will explore building trust through a Form the Team Exercise. (Group)
- Discover the importance of emotional intelligence. (Break out)
- Create structure and accountability within the groups and chapters you are leading.

#### **III. Strong Volunteers are Needed Now More than Ever**

Volunteering has never been so essential, so meaningful, and yet so difficult. Strong volunteers help to shape and reinforce our understanding of the world and the ways in which we choose to approach it. The young adults we are leading need structure, desire connection and inclusion, need personal friendships and brotherhood and need direction. Surrounded by uncertainty, it's okay to admit that things are not normal. Whether you are helping a chapter with virtual recruitment, risk management during stressful times, fundraising or strategic planning, strong leaders will be remembered long after the pandemic subsides. To truly lead during difficult times, you must explore:

- Your drivers to be a great volunteer leader. (Participant Pulse/Video)
- The necessary skills you will need to deploy as you prepare for the fall. (Group)
- The critical needs of your specific chapter(s) or region. (Break out)

#### **IV. Impact of a Volunteer Leader and Your Core Values**

Core values as a combination of “how we should behave” and “what we aspire to”. As Deltasig volunteers we want to give back and share our knowledge, advice and perspective. We have found that the core values that we believed prior to the pandemic are still the best guides for younger brothers. Your core values are even more important since the stay-at-home orders, where brothers have lost standard structures of a typical chapter or fraternal environment. We will help you identify our core values through an assessment exercise. We will:

- Conduct an individual assessment and then share. (Break out / Participant Pulsing)
- Explore the Power of Mind Mapping. (Whiteboard exercise)
- Discuss our “why” as volunteer leaders. (Break out)

#### **V. Creating a Strategic Plan for the Chapter in a Virtual Environment**

With heightened concerns for the safety of incoming students and current members, leaders will be expected to help reinvent how strategic planning and tactical operations are done within the chapters we support. Shaking hands or hugs are also a thing of the past replaced with first bumps face coverings and hand sanitizer. Leaders will need to start preparing and planning this summer to provide enough time to answer questions, deal with potential fears and develop protocols prior to the first day of classes. In this session, we will cover:

- CDC Guidelines and Return to Chapter Operations Playbook. (Group)
- Role of the executive committee in a virtual environment.
  - What does the chapter/brothers need in today’s world? (Break out)
- Tactical planning for recruitment and fundraising. (Group / Breakout)

#### **VI. Questions and Discussion**

### **Session Two: August 15, 2020; 1:00 p.m. – 4:00 p.m. EDT**

#### **I Welcome and Introduction – Tricia Smith, Grand President**

#### **II. Expectations, Role and Responsibilities of a Volunteer**

Support, communication and more support will be the role of a Deltasig leader this fall. Balancing fears, questions and the unknown with brotherhood, connections and continued business growth will be the common theme and expectations of existing brothers and new pledges this fall. In this session, we will explore the role of each volunteer position and discuss the additional skills required to lead virtually in today’s environment. We will discuss:

- Expectations of our volunteers and your responsibilities. (Exercise / Break out)
  - Providing leadership, mentorship and ability to pivot.
  - Teaching business in each chapter. (Feedback, Business Acumen, Business Concepts) (Group)
  - The difference between a coach and a friend. (Group)
- Servant leadership vs. checklist leadership. (Video/Whiteboard)
  - How do we measure leaders? Accountability?
- What not to do—be clear about the authority limits of volunteer leaders.
  - What to do in an emergency—crisis management in today’s new normal. (Group)

#### **III. The 10% Improvement Plan**

Ten percent might not seem like much, but that is our point. We are not asking for a significant change or effort. We are simply asking you to identify something you could do 10% better in the fall. Incremental change can be the spark that ignites performance and serve as a strong motivator without the anxiety that accompanies a major change. We will explore:

- Making plans and improving during COVID. (Group)
- Your 10% journey. (Exercise / Break out)
- Showing new leaders how they can coach brothers and pledges on how to do the same thing.

#### **IV. Chapter Operations and Brother Engagement**

While we discussed tactical operations in Session One, this session is designed to go deeper. We want to share best practices, discuss challenges and accomplishments, and provide takeaway strategies for the following key result areas of chapter growth.

- Virtual Recruitment: Attract, Select and Support (Break out / Group)
- Virtual Marketing: Chapter Brand, Social Media, Connecting with Future Pledges (Break out / Group)
- Virtual Fundraising: Corporate Partnerships and Alumni Relations (Break out / Group)

#### **V. Questions and Discussion**

### **Session Three: September 12, 2020; 1:00 p.m. – 4:00 p.m. EDT**

#### **I. Welcome and Introduction – Tricia Smith, Grand President**

Tricia will share the lessons learned, updated protocols and challenges and accomplishments from the Fraternity in this “Next Normal”.

#### **II. Characteristics of Our Best Volunteers**

Who has been your greatest mentor? Why were they great? What impact did they make and how did they teach you? Transition that perspective to you. What do you offer as a volunteer leader? What legacy do you want to leave and what impact do you want to make? In this session, we will bring together the current implications of the pandemic, building trust and setting expectations virtually, understanding your drivers and core values and learning best practices from some of the best Deltasig leaders in the country. We will:

- Recognize and share the characteristics of the best leaders in the “Zoom room”.
- Define the characteristics/competencies of a today’s successful leader. (Exercise)
- Create position descriptions for each Deltasig leadership role. (Break out)
  - Personality / Cultural Fit, Experience / Education, Skills / Knowledge

#### **III. What Differentiates Delta Sigma Pi? Business Relationships and Partners**

During these uncertain times, traditional methods of community outreach such as attracting business mentors, partnering with local business and connecting with alumni can be challenging. There are, however, a few perspectives you should consider. Many business leaders are working from home and have time to read email, study social media and consider giving back to their communities. Today might be an opportunity for chapters to reach out to local leaders, local alumni and business and start to sell the Delta Sigma Pi brand.

- Building a chapter business plan during this downtime. (Group)

- Targeting local business leaders and future partners. (Group)
- Re-connecting with alumni. (Break out)

**IV. The New/Next Normal – After the Crisis**

Perspective. That is the skill that will be required this fall. What have we learned? What questions have been answered? What is left to do? As Delta Sigma Pi leaders, we are on the front line to help the chapters navigate each new normal. We might need to help chapters rebuild, refocus, or reboot their culture of brotherhood. We might need to show them empathy, trust and follow-through. The content of this session will depend on the success or challenges faced with us returning to class.

**V. Questions and Discussion**