2023

Facilitator Guide

Schedule of Events

Friday – January 13th				
Start Time	**End Time**	**Duration**	**Type**	**Title**
2:00 pm	5:00 pm	3 hours		Facilitator Training & Preparations
5:00 pm	6:00 pm	60 min		Facilitator Personal Prep
6:00 pm	6:50 pm	50 min	Large Group	National Honorary Initiation
6:50 pm	7:00 pm	10 min		Passing Period
7:00 pm	7:50 pm	50 min	Large Group	Dinner & Networking
7:50 pm	8:00 pm	10 min		Passing Period
8:00 pm	8:15 pm	15 min	Large Group	Welcome by Grand President Cory Stopka
8:15 pm	9:30 pm	75 min	Large Group	Your Personality at Work: Birkman Basics
9:30 pm	9:40 pm	10 min		Passing Period
9:40 pm	10:25 pm	45 min	Small Group	Small Group Introductions & Get to Know You Activities
10:30 pm	11:00 pm	30 min		Facilitator Huddle

Saturday – January 14th				
8:00 am	9:00 am	60 min	Large Group	Breakfast, Operation Roundtables & Networking
9:00 am	10:00 am	60 min	Small Group	Building Successful Teams
10:00 am	10:10 am	10 min		Passing Period
10:10 am	10:40 am	30 min	Large Group	Incentivizing, Motivating, & Accountability
10:40 am	10:50 am	10 min		Passing Period

10:50 am	11:50 am	60 min	Small Group	Incentivizing, Motivating, & Accountability
11:50 am	12:00 pm	10 min		Passing Period
12:00 pm	12:30 pm	30 min	Large Group	Understanding Organizational Purpose and Principles
12:30 pm	1:50 pm	80 min	Large Group	Lunch: State of the Fraternity with Grand President Cory Stopka & Leadership Panel
1:50 pm	2:00 pm	10 min		Passing Period
2:00 pm	3:15 pm	75 min	Small Group	Putting the Strategy in Strategic Planning
3:15 pm	3:35 pm	20 min		Snack Break & Passing Period
3:35 pm	4:20 pm	45 min	Large Group	Navigating Difficult Conversations
4:20 pm	4:30 pm	10 min		Passing Period
4:30 pm	5:30 pm	60 min	Small Group	Navigating Difficult Conversations
5:30 pm	5:45 pm	15 min		Break
5:45 pm	7:05 pm	80 min	Large Group	Dinner: Etiquette Dining Program
7:05 pm	7:15 pm	10 min		Passing Period
7:15 pm	8:00 pm	45 min	Large Group	Leading Like a Facilitator
8:00 pm	8:10 pm	10 min		Passing Period
8:10 pm	9:10 pm	60 min	Small Group	Leading Like a Facilitator
9:15 pm	9:45 pm	30 min		Facilitator Huddle

Sunday – January 15th				
8:00 am	9:00 am	60 min	Large Group	Breakfast, Operation Roundtables & Networking
9:00 am	10:00 am	60 min	Small Group	Bringing it Back to Your Chapter, Evaluation
10:00 am	10:15 am	15 min		Passing Period
10:15 am	11:15 am	60 min	Large Group	Inspirational Leadership
11:15 am	12:00 pm	45 min	Large Group	Graduation, Next Steps and Farewell

Table of Contents

The Role of Facilitation

Objectives

- Learn the expectations of the facilitator role.
- Gain helpful tips for dealing with common situations in the small groups.
- Discuss how to use the facilitator guide effectively.
- Practice mock sessions and facilitation activities.

What is Facilitation?

Facilitation is the process of guiding a group of students through a learning experience and includes:	Effective facilitation requires facilitators that are:
• Supporting the curriculum through discussion and activities. • Creating connections of shared information and experience. • Helping participants process information and solidify learnings. • Providing focus and direction during discussion and activities. • Appropriately challenging and questioning participants.	• Natural and genuine. • Interested in all participants. • Engaged in a series of conversations with a variety of participants. • Clear and non-judgmental in their communication. • Flexible and able to adapt to different situations. • Focused on the participant's experiences and struggles. • Developing appropriate relationships with participants and facilitators.

Six Core Competencies of a Facilitator

Communication — *The facilitator will exhibit skills in communicating by:*

- Expressing ideas clearly and accurately
- Thinking well on their feet
- Showing a sense of humor with a sense of seriousness

Personal Interjection — *The facilitator will regulate their remarks to:*

- Call the group's attention to particularly helpful statements
- Rephrase participants' ideas to clarify and reinforce
- Avoid expressing personal opinions

Group Participation — *The facilitator encourages group participation by:*

- Seeing that participation is distributed evenly among members
- Maintaining eye contact with the entire group
- Being alert to nonverbal cues of interest and boredom

Group Atmosphere — *Facilitators will create a welcoming, safe atmosphere in the group by:*

- Showing respect for and interest in the opinions of all group members
- Allowing participants to share minority views comfortably
- Helping participants view/discuss issues from many angles before reaching conclusions

Guiding Discussion — *The facilitator shows skills in guiding the discussion by:*

- Providing "meat" for the discussion without monopolizing the discussion
- Listening critically for puzzling aspects that are giving the group trouble
- Directing discussion away from inappropriate remarks

Encourage Growth — *Facilitators will encourage students to expand personal perspective by:*

- Gently encouraging students to question the validity of their arguments or reasons
- Helping participants examine their current realities that are outside the norm or against accepted standards
- Sharing experiences that may help participants identify new ways of doing things, confronting inappropriate traditions, etc.

Expectations of a Facilitator

Put a √ next to each expectation you feel comfortable meeting. Put a **X** next to each expectation you have questions about. Use the space below to record your questions and notes.

Participate Fully

☐ Sit with students in educational sessions and at meals.

☐ Complete worksheets and reflections along with students.

☐ Use un-programmed time to connect with students outside of the curriculum.

☐ Remain with students during breaks rather than separating or isolating yourself.

☐ Remain at Presidents' Academy for the duration of the event.

Act as a Positive Role Model

☐ Model the behavior you want to see.

☐ Show interest and attention at large group sessions.

☐ Be attentive to group members' thoughts, ideas, and opinions.

☐ Show respect to all Presidents' Academy attendees.

☐ Be early or on-time for every session.

☐ Model Fraternity values through your speech and actions.

☐ Address disrespectful or otherwise unacceptable behavior from participants or group members.

☐ Support the Fraternity Risk Management, Policy, and confront any violations.

Facilitation Best Practices
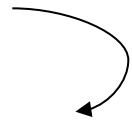
Facilitators should know: It's not about you.

Do	Don't	How
Focus attention on students.	Make it about you, your experience or your success.	
Help students focus on their learning.	Act like a parent.	
Encourage participation.	Put students on the spot or force interaction.	
Allow students to think, debate, and struggle with concepts.	Give them the answers.	
Allow for silence.	Fill quiet moments by talking.	

Facilitators should know: Trust the process.

Do	Don't	How
Allow situations to unfold.	Force, control or try to regiment learning.	

Value differences between groups.	Compare small-group learning experiences.	
Understand and welcome mistakes or challenges.	Stress when things don't go according to plan.	
Expect a variety of student reactions and engagement.	Take lack of engagement personally.	
Anticipate frustrating or overwhelming moments.	Assume that facilitation is easy.	

Ideas for Dealing with Common Group Situations

Managing Discussions

Ask more questions than statements.

Summarize and make observations for the group to consider.

Invite quiet members to speak and manage domineering or eager members' contributions.

Use flip chart and Parking Lot items to add variety.

Use natural moments in the conversation as transition points from topic to topic.

Use "How," "What," and "When" questions. Avoid "Why" questions that may make students defensive.

Use statements like, "Let's hear from…"

Use phrases like, "That is a great segue way into our next topic."

Managing Group Energy

Use positive energy and momentum to your advantage.

Be aware of how your role as an adult, official facilitator affects student participation. Avoid breaking into student conversation unless necessary.

Incorporate physical activity or changing seats to re-energize.

Make room for conflict and disagreement as long as it's productive.

Recognize signs that the group is ready to move on to the next topic.

Recognize when students THINK they're ready to move on to a topic but haven't really made strong connections, yet. Provide them with further prompts.

Addressing Disruptions

Disruptions and side conversations are a common occurrence during facilitation, particularly within groups who get along well and feel comfortable and casual with one another. Use the following basic format to address these issues and see further tips and tricks for specific situations below.

Gentle & Subtle Hints

Direct Invitations to Engage

Address Individual Separately

Disruptive Group Members
- Bring individuals back to focus by calling attention to the topic at hand.
- Show individuals that you notice their disruption.

- Steer the group toward appropriate topics.
- Prompt disruptive individuals to make relevant connections.
- Address individual privately, if needed.

Negativity & Skepticism
- Provide positive alternatives to negativity.
- Present opposing or alternative viewpoints.
- Ask participant to consider other views.
- Invite other opinions from group members (use group opinion/pressure to your advantage).
- Address the importance of openness and positivity to the learning process.
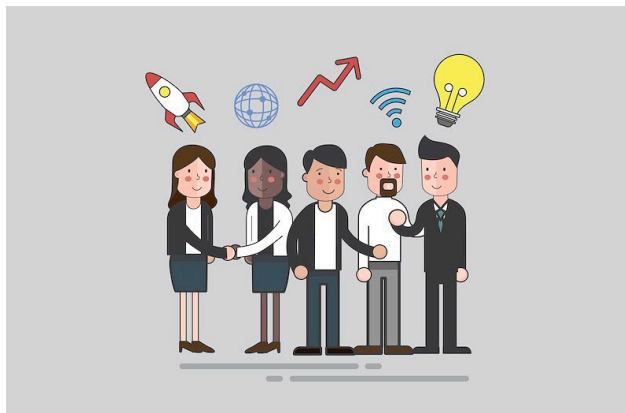
Side Conversations
- Make eye contact with individuals.
- Ask participants for their attention and respect.
- Ask participants directly for their thoughts on the topic they are ignoring.
- Openly address side conversations with the group.

Academy Meetings

Facilitator Huddles

Facilitator Huddles are brief meetings for facilitators to come together and prepare for upcoming sessions. Designed to move quickly, these meetings allow facilitators to get on the same page, discuss issues quickly, and support each other through the Presidents' Academy. Large group issues or situations that impact the whole group will be discussed at this time as well.

Facilitators should pay close attention to daily schedules and identify when Facilitator Huddles will occur. Facilitators should automatically group in a specified location for these meetings.

Small Groups

Small Groups are a continuation of the shared curriculum. These meetings exist to personalize the application of information presented in the large group sessions, so students better understand how to utilize their knowledge and skills throughout their professional careers, in their own Chapter, and Greek community. Consequently, the bonding that occurs in the meetings occurs as a by-product of the learning rather than the goal. Small groups allow the participants to really discuss important matters that connect to the curriculum as a whole.

In addition, in each small group, there will be time for "parking lot" items. These are items that they are interested in talking about that may not be an essential element of the core curriculum. Parking lot items are not "best T-shirt theme" discussions, but "how do we eliminate offensive T-shirts" discussions. There should be depth to the talk.

Encourage small group members to enjoy their small group, to have lots of fun together, to share experiences outside the small groups, but not at the exclusion of the other groups. They should respect that when personal information is shared in small groups, they shouldn't repeat the information outside the group.

Understanding the Role of Small Group Meetings

Effective facilitators understand the goals and objectives of small group meetings, working to ensure that activities and discussions in small groups are focused on the curriculum and are true to the Academy's shared experiences.

- Small group meetings are focused on processing the educational session outcomes, NOT on sharing unrelated personal information.
- Parameters of the group meeting are followed, and no new curriculum pieces are introduced by facilitators.
- Competition between small groups is NOT encouraged by naming the group, developing personal chants, steps, calls, etc.
- Do not provide gifts for group members.
- Concentrate on processing the conversation and engaging participants rather than presenting and controlling the conversation.

Volunteer Engagement

District Directors, Assistant District Directors, Chapter Advisors and Regional Vice Presidents will be engaged again for this 2023 event, but it will be pre and post participation – not onsite. They will receive this Facilitator Guide and the Participant Workbook in mid-December. Volunteer leaders are encouraged to connect with their participants following Presidents' Academy to assist the participants with achieving their Leadership Action Plan.

Welcome by Grand President Cory Stopka

Setting: Large Group
Duration: 15 minutes
Start Time: 8:00 pm
End Time: 8:15 pm

Overview

The purpose of this session is to welcome them to the Presidents' Academy and lay a solid foundation of understanding as to expectations for the weekend.

Objectives

- Welcome participants
- Articulate ground rules and expectations
- Introduce Staff, Volunteers, and Facilitators

Activities and Items Needed

- PowerPoint presentation

Room Setup

- Theater style

AV/Tech Needs

- Computer with wireless presentation remote
- Projector and screen
- Lavalier microphone for the lead facilitator
- 2 wireless microphones for use in the crowd

Content

Start Time:	8:00 pm	End Time:	8:04	Duration:	4 minutes
Welcome by Grand President Cory Stopka *Participant Workbook pg. 6* ● Explain the history behind the Academy ● Explain the goal of the Academy					
Start Time:	8:04 pm	End Time:	8:08 pm	Duration:	4 minutes
Ground Rules/Expectations for all Attendees <u>Essentials</u> ● Nametags: Wear them! All the time! ● Workbooks: Bring them… to EVERY session and put your name in them so we can return them to you should you momentarily misplace them. ● Feedback forms, to be filled out after each session, are in the back of the participant workbook. You will be asked to do an online survey Sunday and can refer to these notes.					

Timeliness
- *To be early is on time. To be on time is late. To be late is unacceptable.* We have breaks and passing periods built throughout the event to help us with this effort – please do not disrupt the experience of your fellow participants by being late.

Participation
- Be present, attentive, and unplugged from other distractions. Listen actively and attentively.
- Assume positive intent.
- Respect confidentiality.
- Ask for clarification if you are confused.
- Do not interrupt one another and be careful not to monopolize the discussion.
- Challenge one another but do so respectfully.
- Critique ideas, not people. Avoid put-downs (even humorous ones).
- If you are offended by anything said during the discussion, acknowledge it immediately.

House Rules
- We are guests at the Sheraton Westport Chalet and want to keep our great relationship! Treat the facilities and hotel staff with respect. Do not vandalize in any way.
- Your hotel accommodations are being covered by Delta Sigma Pi (unless other arrangements are made), but if damages to the room occur, your chapter will be invoiced for any damage charges from the hotel.

Risk Management
- All attendees must comply with the Fraternity's Risk Management Policy, as well as Federal, State, and Local laws. Those in violation are subject to being sent home from the event at your expense, as well as additional disciplinary and/or legal action. Remember, you signed the Code of Conduct when you registered to attend.

COVID Guidelines
- As the health and safety of our brothers is of the utmost importance, Delta Sigma Pi will adhere to all federal, state, and local COVID or other pandemic protocols at the time of Presidents' Academy. Safety protocols may be adjusted as the Fraternity continues to monitor COVID activities. If you or other attendees have symptoms of COVID, please contact Central Office staff for assistance and guidance.

Emergencies
- For safety reasons and to maximize attendee interactions, we hope you'll remain on property throughout the weekend, however, if you must leave or have an emergency, please let a staff member know.
- If you need something, talk to someone on staff and we will do whatever we can to maximize your experience.
- If you're sick or you see another attendee is sick, please let staff know right away.

Start Time:	8:08 pm	End Time:	8:13 pm	Duration:	5 minutes

Introductions
- Staff & Volunteers
- Small Group Facilitators & Guest Facilitators

Start Time:	8:13 pm	End Time:	8:15 pm	Duration:	2 minutes

Conclusion
- What is coming up tonight
- Introduce the Facilitators of the next session

Your Personality at Work: Birkman Basics

Setting: Large Group
Duration: 75 minutes
Start Time: 8:15 pm
End Time: 9:30 pm

Overview

In our journey along our career path, we have three distinct types of relationships – with self, others, and organizations. Because of the common denominator role of self in these relationships, self-awareness is essential and foundational in almost every aspect of our professional and personal life. This program is designed to give us an authentic look at ourselves, how we relate to others who may be different from ourselves, and how we adapt to the organizations we join.

This session will teach participants how to better leverage the diverse membership of their Chapter, get the most out of their members, and function within a business community.

Objectives

- Review the four personality types
- Learn how to read the Birkman Map
- Understand the basics of self-awareness
- Learn how to apply the concepts of the Birkman within your relationships

Activities and Items Needed

- PowerPoint presentation
- Members need Birkman Map nametag and workbook
- Color signs to designate corners with each Birkman color

Room Setup

- Theater style

AV/Tech Needs

- Computer with wireless presentation remote
- Projector and screen
- Lavalier microphone for the lead facilitator
- 2 wireless microphones for use in the crowd

Content

Start Time:	8:15 pm	End Time:	8:30 pm	Duration:	10 minutes

Birkman Background & Introduction to the Birkman
Participant Workbook pg. 10-14
- 3 types of relationships
- Roger Birkman story
- Decoding the Birkman symbols and colors
- Color Styles

Start Time:	8:30 pm	End Time:	8:45 pm	Duration:	15 minutes

Interests
Participant Workbook pg. 15

ACTIVITY: "Please break out in the corner of the room that corresponds with the color of your INTEREST symbol (*)."

Wait for everyone to move to their color and the room to settle.

ACTIVITY: "Talk amongst yourselves. What are your hobbies and what are you passionate about? What is the common thread that runs through your group's interests? You have 5 minutes to discuss."

Debrief for each color: (blue, green, red, yellow)
What are some of your hobbies?
What do you like to do in your free time?
What do you like most about that activity?

Try to emphasize how their responses relate to their color.
Explain what Birkman says about the color

Blue
- Creative or innovative activities
- Artist types, writers, musicians, research and development engineers
- Look to the future to affect the present

Green
- Directly interacting with or influencing people
- Move people from A to B, sales and marketing, teachers, actors, politicians
- Focus on the present to affect the present

Red
- Getting things done, goal-oriented activities
- Builders, production engineers, outdoorsmen, open spaces
- Focused on the present to affect the present

Yellow
- Structure, precedent, or routine. Everything has its place and every place has its things
- Accountants, administrators, CFOs, historians, librarians
- Look to the past to affect the present

Start Time:	8:45 pm	End Time:	9:00 pm	Duration:	15 minutes

Usual Behavior
Participant Workbook pg. 15

"Please break out in the corner of the room that corresponds with the color of your USUAL symbol (diamond)."

Wait for everyone to move to their color and the room to settle.

"Talk amongst yourselves. On a good day, what positive behaviors do you naturally exhibit? It may be difficult to self-assess, so ask your fellow group members to describe these behaviors. You have 5 minutes to discuss."

Debrief for each color: (blue, green, red, yellow)
What are some of your behaviors?
What are you like on a "good day"?
How did/would others describe you?

Try to emphasize how their responses relate to their color.
Explain what Birkman says about the color

Blue
- Insightful, selectively sociable, thoughtful, reflective, and optimistic

Green
- Competitive, assertive, flexible, and wildly enthusiastic about new things

Red
- Friendly, decisive, energetic, frank, logical, casual

Yellow
- Team oriented, orderly, concentrative, cautious, insistent

Start Time:	9:00 pm	End Time:	9:10 pm	Duration:	10 minutes

Needs Dimension
Participant Workbook pg. 16-17

ACTIVITY: "Please break out in the corner of the room that corresponds with the color of your NEEDS/STRESS symbol (circle/square)."

Wait for everyone to move to their color and the room to settle.

Explain each color: (blue, green, red, yellow)

Blue
- The world I live in is a VERY complex and complicated world full of nuances. There's black, there's white and a million shades of grey in between. What I NEED is an opportunity to discover this complex world that I live in. I need to look at it very carefully. I need to talk to my pals about it. I need to look at it objectively and subjectively.
- *Blue is about the joy of discovery.*

Green
- The world I live in is the game of life. There's a game, there's an objective, I get there first I win the game it's as simple as that. There are a few things I need before I can play this game. I need to know what the parameters are because I want to play fairly and I don't want to get disqualified. I need to know what the rewards are so I can decide if I want to play or not. Once I decide to play, I need the freedom to play – not a whole lot of micromanaging. I need latitude to be able to use my unique talents and strengths.
- *Green is the joy of competition.   It's about the thrill of victory and the agony of defeat.*

Red
- The world I live in is quite simple thank you very much. You've got white, you've got black, you've got a few shades of grey so what's the big deal blue? I have an internal generator that produces energy and the more I do the more energy I've got. What I need from the world is a clear path to lay my energy down. I don't need any ambiguity, roadblocks or emotional stuff mucking it up.
- *Red is about the joy of accomplishment.*

Yellow
- The world I live in is chaotic, disorganized, and sometimes dangerous. However, the environment I have created for myself and my friends is safe and secure and clean and pristine. All I need is a little bit of control to make sure my world stays safe and secure and clean and pristine for the people that I care for – my friends, my relatives, my team, my brothers, and my sisters.
- *Yellow is all about the joy of taking care of "family."*

Start Time:	9:10 pm	End Time:	9:20 pm	Duration:	10 minutes

Stress Behavior & Stress Management
Participant Workbook pg. 16-17

[KEY POINT] Needs met equals good day, needs not met equals a bad day.

Explain each color: (blue, green, red, yellow)

Blue
- I've seen 90 out of 100 but there are 10 I haven't seen and there's no way I can make a decision based on that! OK, OK, I'm getting way too excited for my own good so I shall hush

up and step back and pull away. I'm not going to say anything, but it still looks a little too vague to me and I'm really not sure and I still can't make a choice and everything is looping around in my head. Everything looks bad to me and I think I'm over thinking this and I'm probably worrying way too much and I'm getting tired and I need a nap. Oh my goodness I think I've got the blues, baby! Blue stress behavior is the Blue Funk!

Green
- When the rules changed up in the middle of the game or I didn't get the rewards I so justly deserve this is what I'm going to do. I'm going to say, "you know something? You folks aren't taking good care of me so I'm going to start taking care of myself. As a matter of fact, I'm going to start taking care of myself right now! As a matter of fact, I'm taking over this ship and taking it over right now! And by the way, I don't know what the hell I'm doing but I am going to do it anyway!" Oh my goodness, I think I've become the Green Monster! The Incredible Hulk!

Red
- When the road is filled with ambiguity, roadblocks, and emotional stuff and my motor is running and running and it hurts my motor to go so slow. My motor is running and running and finally I can't take it anymore and my head is going to go down and my blinders are going to go up and my eyes focus on the task I deem appropriate for this situation and I shall rush to it and grab it by the throat and work on it and work on it and work on it and I'm going to finish and be so proud of myself and I'm going to look around and there are bodies everywhere. Oh, oh my goodness, did I do that? Oh my, I turned into the Red Bull!

Yellow
- When I start to lose control of the situation and the safety and security of the people I care for is being threatened, this is what I'm going to do. I'm going to leap into the trenches and I'm going to hunker down and protect everything that is still left and I'm not going to let anybody touch it. Good, bad, necessary, unnecessary, nobody touches this stuff! I'm going to get into a passive aggressive stance. Why am I doing that, well you ought to know, so I'm not going to tell you! Oh my, I'm getting some Yellow Angst!
- What I really like about the yellow mindset is that on a good day we're standing on a hill and we can see the whole picture, and our mind is like an excel spreadsheet. And you put information in the spreadsheet and it begins to create a pattern which creates the mosaic, a big picture. However, on a bad day we hunker down with a bunker mentality and may become impractical and naive, and resistant to change.

In times of stress, remember to act like the color opposite you. Blues address stress by thinking like Red, Green address stress by thinking like Yellow, etc.

Start Time:	9:20 pm	End Time:	9:30 pm	Duration:	10 minutes

Birkman Summary
Participant Workbook pg. 18-22

Symbol location and ability to relate (Can be cut or shorten depending on time)
- Extreme vs. shared color tendencies

- ● Multi-quadrant maps vs. one-color maps
- ● Invisible needs and the importance of clear communication

Birkman and the world
Personality breakdown across ALL Birkman scores worldwide

Show the Delta Sigma Pi group map on the PowerPoint slides.

Worldwide there is an even breakdown across the four personality types. Here is Deltasig's group map for Presidents' Academy attendees. As you can see our group leans more [_____ – *fill in prior to facilitation*] and has less of [_____ – *fill in prior to facilitation*]. Why is this important to know?

We will talk about this more in-depth during our Building Successful Teams session tomorrow, but there is value in having a diverse representation within our teams, chapter, communities, etc. Diversity does not only mean a variation in identities and backgrounds represented but also the different personality types that make up a team. Each personality type brings to the table a certain set of strengths that complement achieving the goals of a team.

Two main takeaways:
1. Remember that the common denominator in all relationships is the self. Effective relationships with others begin with understanding yourself.
2. Different people have different needs, and view things differently than you do. Don't treat people how YOU want to be treated. Treat others the way THEY want to be treated.

Utilizing the Birkman in Real Life

Participant Workbook pg. 23

The Birkman is a great tool to help us understand ourselves, how others may differ from us, and how best to engage and work with people that are different from us. Our Birkman nametags during Presidents' Academy are helpful to provide context for other attendees' personality types. However, when we leave here on Sunday, how do we determine the personality types of those we work with, like our fellow chapter leaders, chapter members, faculty/staff on campus, or our future employers and co-workers?

I'll give you a hint – We practiced methods of learning about others during our Birkman colors activities. We take the time to ask the right questions to better understand the interests, usual behaviors, stress behaviors, and needs of the people we work closely with. By asking some basic questions and being genuinely interested in utilizing their response to adapt your future interactions with them to fit their needs will help you to develop a more trusting and productive relationship.

Small Group Introductions & Get to Know You Activities

Setting: Small Group
Duration: 45 minutes
Start Time: 9:40 pm
End Time: 10:25 pm

Overview

The opportunity for small group work is an important part of the learning experience. Small, more personal group sizes allow us to express thoughts, ideas, opinions, stories, and reactions in a trusting and supportive space. Many learners are more likely to engage honestly and openly with small groups than in large, lecture settings, which can improve their ability to process information in a meaningful and thorough manner.

For the small group setting to be truly inviting, however, we must feel comfortable sharing with others in our group. This session provides an opportunity to learn more about the members in each small group, and it allows members to begin building trust and connections on the first night of the Academy.

Objectives

- Meet the members of the small group
- Learn about one another's interests and preferred styles
- Build trust and connection through shared stories

Activities and Items Needed

- Name Game Activity
- Pictionades Activity
- Flip chart
- Marker(s)

Room Setup

- Name Game Activity needs a space in which members can stand in a circle facing one another.
- Pictionades Activity needs an open space for participants to perform, and a semi-circle of chairs for other group members to watch the performance.
- As space allows, set up small group chairs in a semi-circle facing an open space. Students can create a circle in the open space for the Name Game Activity, and then use the space as a "stage" for Pictionades.

AV/Tech Needs

- None

Content

Start Time:	9:40 pm	End Time:	9:45 pm	Duration:	5 minutes

Opening/Introductions

Facilitator should introduce themselves and spend about 5 minutes introducing the group to the concept of small group work and what benefits and expectations exist for these meetings. Feel free to use the suggestions below, and/or create your own.

- Use the "Overview" section of this session to describe the benefits of small group work
- Opportunity to dive deeper and more personally into overarching concepts
- Refer back to the House Rules on pages 8-9 of the Participant Workbook
  - Participants are expected to attend all small group sessions
  - Ask participants what expectations they'd like to set for their group (Give them ownership, responsibility, and accountability in the expectation-setting process.)

- Thank them for attending Presidents' Academy and a weekend away from home/campus. Their dedication to their personal and leadership development is a testament to their dedication to their chapter and future career.

Our main goal for tonight's small group session is to get to know one another. We will play a couple of fun games to achieve this goal. As we play these games, we think about how what we are learning about each other may correlate with each other's personality types.

Start Time:	9:45 pm	End Time:	9:55 pm	Duration:	10 minutes

Name Game Activity

To meet one another and learn each other's names, the facilitator will lead participants through a Name Game Activity in which participants will stand in a circle and test their memory of one another's names. Use the instructions below:

1. Instruct participants to stand in a circle facing one another.
2. Each participant (including the facilitator) should take a minute to think about an adjective that describes them that also starts with the same letter as their name. Once they've picked their adjective, they should also think of an accompanying motion that exemplifies that adjective.
   a. Ex. Kinetic Kate (snapping fingers); Dancing Doug (disco arm motion); Hopeful Hannah (hands in a prayer formation)
   b. It is helpful if the facilitator has already selected their name-adjective-motion combination to use as an example.
3. Pick a place to start in the circle, and the participant will say "Hi, I'm <insert their adjective and name, while also performing the motion>.
   a. Ex. "Hi, I'm Kinetic Kate," and Kate snaps her fingers.
4. The next person in the circle will repeat the adjective, name, and motion of the person who came before them, and then add their own adjective, name, and motion.
   a. Ex. "Hi, Kinetic Kate (while snapping fingers), I'm Dancing Doug," and Doug would perform his disco arm.
   b. Ex. "Hi, Kinetic Kate (while snapping fingers), and Dancing Doug (adding disco arm), I'm Hopeful Hannah," and Hanna would perform her own prayer hands.

5. This process repeats, and each new participant must repeat the adjectives, names, and motions of all the people who came before. The last person in the circle is challenged with remembering everyone's name combinations.

After completing the circle, participants should be much more comfortable with each other's names, feel a bit more loose and relaxed, and be ready to move into the final get-to-know-you activity.

Start Time:	9:55 pm	End Time:	10:25 pm	Duration:	30 minutes

Pictionades Activity

After participants have learned one another's names and gotten a bit silly and loose, encourage them to share a bit more about themselves through this Pictionades activity—a combination of Pictionary and Charades. In this game, participants will draw or mime their favorite hobbies for the rest of the participants to guess. Use the instructions below:

1. Sitting in a semicircle, split the group into two teams. Hobbies will be performed individually, but points will be awarded per team.
2. Each participant should consider their favorite hobby or activity, which they will either perform through a silent mime or through a Pictionary-type drawing (using the flip chart).
   a. Individuals may act OR draw, but not both.
   b. Individuals may select ONE member of their team to help them act or draw. These two may speak to each other, but neither person is allowed to speak to the group as a whole.
3. Individuals will act or draw for the entire group to guess what their favorite hobby is, and the team that is first to correctly guess receives a point (no matter which team the individual is on).
4. Play until all participants have had a turn or until time is up. (Facilitator may want to put a time limit [~1 min. per turn] to keep the game moving.)

After the activity is complete, the facilitator should thank participants for their candid participation and express the hope that they feel more comfortable with one another, now.

Take about 10 minutes to debrief the activities using the following discussion questions.
● What connections can we draw between these get-to-know-you activities and what we learned in the opening session?
● What kinds of follow-up questions could we ask one another to learn more about how each person's adjective from the name game shares their personality type?
● What about follow-up questions from each other's hobbies from the Pictionades activity?

Regardless of the personality assessment used or the personality type a person may be, it's important that we take the time to get to know one another on a deeper level. Learning about a person's interests, hobbies, and characteristics can tell us a lot about the type of person each of us is, how to build connections with one another, and each other's strengths.

Close out the evening by reviewing the schedule for Saturday morning. Share the time and location for breakfast and that you will meet back in small groups for Building Successful Teams at 9:00 am.

Friday Facilitator Huddle

Duration: 30 minutes
Start Time: 10:30 pm
End Time: 11:00 pm

Record your questions and notes here.

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Building Successful Teams

Setting: Small Group
Duration: 60 minutes
Start Time: 9:00 am
End Time: 10:00 am

Overview

Building a successful and productive team has always been the duty and challenge of a formal leader. Leaders must bring people with different personalities, skill sets, and backgrounds together in a way that allows them to successfully move through the stages of team development: Forming, Storming, Norming, and Performing. This requires both understanding the natural phases that teams experience, as well as understanding the personalities of team members. This session explores the process of assembling a team through learning about stages of team development, process flow, and group personality characteristics.

Objectives

- Learn the stages of team development
- Analyze the Collaborative Model for team processes
- Use the Birkman Method to learn relational insights on Usual Behavior
- Acquire better insights into the value of different strength behaviors
- Explore positive personal behaviors that contribute to cohesive group dynamics
- Practice the usage of these insights to make assessment and selection of a team

Activities and Items Needed

- Members need Birkman Map nametag and workbook
- 16 Leader Corp employee profiles (included in the Participant Workbook)
- The Collaborative Model (included in the Participant Workbook)
- Watch or phone timer to keep time

Room Setup

- Chairs in a semi-circle with an open space to complete the Photo Finish activity

AV/Tech Needs

- None

Content

Start Time:	9:00 am	End Time:	9:15 pm	Duration:	15 minutes

Introduction
Participant Workbook pg. 25-26

Facilitator should open by making connections between this session and the overarching goals of Presidents' Academy. Improving leadership skills is a main focus of Presidents' Academy, and the ability to build successful teams is often where good leadership begins.

You might find sports analogies to be helpful, here, or any situation where someone is responsible for putting together a team.
- Ex. A successful coach wouldn't field a football team full of quarterbacks or a softball team full of catchers. They would look for people to fit each position. A variety of perspectives, experiences, and skill sets are important.
- Ex. A choral instructor looks for many different voices that blend, not all sopranos, all altos, or all soloists. The qualities that make singers different (and their ability to sing together) is what makes a great choir.

Feel free to use the scripted example below to open:

"One of the goals of Presidents' Academy was to impart leadership skills that would help you succeed in your professional careers and show you how those same skills can help you excel in leading your chapter. This starts with building your teams to position you for success. You can't always choose your team, sometimes you're the new addition to the team and tasked to lead the group assembled. However, when you can choose your team, it can pre-determine success or failure. In the scenarios, when you don't get to choose your team, knowing how to determine and respond to individual team members strengths and needs in their uniquely personal way can set your team toward a destiny of success or failure"

Prompt participants to think about what a great team looks like. Instruct participants to split into groups of 3 and come to an agreement on what is the best example of a company or team. (Give them about 5 minutes.) Use the questions below to help you open the discussion:
- What does a great team look like?
- How does a great team act?
- What is the best example of a team that you can think of, and why?

As participants share their responses, relate them back to the common elements found in teams:
1. Common goals vs. individual goals
2. Commitment of members to common goals
3. High degree of interdependence among members
4. Team accountability

When groups have shared their responses, use the following questions to dig deeper and transition into talking about stages of team development:

- Has the team you chose always performed at such a high level?
- How long has the team been together?
- Have there been changes to this team along the way?

Note that even the best teams experience challenges as they go through the following stages:

1. Assembling/Forming - The period when teams form and come together for the first time, or when new members are added and the dynamics of the team re-form. Marked by meeting one another, learning about one another, and getting used to team members.
2. Developing/Storming - The period of conflict teams experience as they move out of the "honeymoon" phase of meeting one another and into the work of being a team. How will they work together? Whose ideas will be followed?
3. Maintaining/Norming - The period where norms are developed, processes are decided, and conflict is being worked through.
4. Performing/Performing - The period where norms and processes result in success and smooth working conditions. Team members work well together, and projects are completed. Note that the performance stage is difficult to reach, and many teams never reach Performing. This is particularly true of student groups, since there is so much turnover they are often stuck in Forming and Storming. However, there are steps we can take as leaders to plan a successful transition and succession plan to promote consistent development to strive for the performing stage.

Explain that these stages are fluid, and teams often move back and forth between them. In fact, many teams never even make it to Performing and are constantly Maintaining or Norming. For students, in particular, their teams are most likely to be in Storming or Norming. With the addition of new members and graduation of seniors, student teams are constantly re-forming. However, a thorough new member program and engaged alumni, in addition to detailed transition and succession plans for officers can help alleviate these cyclical team struggles.

If time allows, ask students which stage their own chapter falls into.

Start Time:	9:15 pm	End Time:	9:40 am	Duration:	25 minutes

Review of Behavioral Patterns
Participant Workbook pg. 26

Briefly review the Interests and Usual Behavior of each personality type (Birkman color). We will focus on these two factors since Interests can determine how workers prefer to spend their time, and Usual Behavior is what we most often see from people on a day-to-day basis.

The Collaborative Model
Once students are reacquainted with the personality types (Birkman colors), explain the process model called The Collaborative Model (included in the participant workbook). This model takes a two-phase process model (a planning and a doing phase) and overlays the personality types (Birkman colors) on top of it. These personality types can show us where team members/employees might be best placed within a job process or project. Use the following questions to gauge understanding:

- Who has used a process model before?
- What is the process you use in your chapter for completing events or projects? (Most often, students assign one officer or one student to complete the entire project.)
- Who is familiar with the concept of using a process to complete a project?
- What do you think about assigning people to their best strength within a process? (Meaning that multiple people would work on different aspects of a project.)

Photo Finish Activity

After explaining and debriefing the process model, introduce participants to the next activity, which will help show how the students interact during a task. Give them just ten minutes to complete the activity. (Use a watch or phone timer to keep time.)

Object of the game: To take a photo of everyone's foot crossing the finish line at the same time.
Rules of the game:
1. Everyone must participate
2. Only one person may take the photo
3. You may only take one photo

Students will react differently to such vague instructions, and ten minutes is enough time for some to feel as if discussion has gone on too long but for others to feel as if there's not enough time. The facilitator should observe how they approach the task and interact, taking notes, if needed. When ten minutes is up (or the group finishes), use the following questions to help you debrief:
- What was that activity like for you?
- How did you approach the objective?
- How did you approach the objective differently from others in your group?
- How did you handle collaboration?
- How did you handle not getting your way?
- How did you handle the vague instructions?
- What personality types (Birkman color) characteristics did you see coming through?
- Did you use the Collaborative Model to achieve the objective?
  - If so, how did that work for you?
  - If not, why not?
- Did you notice any stages of team development within your group work?

At this point, participants should have a good idea of how stages of development, the importance of process, and personality play into team development. Transition into the next activity, which asks them to assemble their own team.

Start Time:	9:40 am	End Time:	9:50 am	Duration:	10 minutes

Assembling a Team
Participant Workbook pg. 27

Facilitator should split participants into personality type (Birkman color) groups based on Stress colors. (If there's an odd number or only one of a specific color, pair them with a neighboring color on

the map's Y axis [task vs. people.] Ex. Yellow pairs with Red, Blue pairs with Green.) Then, describe (or read) the following situation to participants:

Welcome to Leader Corp. We are a tech firm with a diversified portfolio of products and services. We have identified a number of potential business opportunities and need to assemble a task force to investigate them. We anticipate this task force operating for at least 18 months, but maybe as much as 2 years. We have selected a number of potential individuals for this team and have prepared a dossier of their profiles. All of the individuals are equally skilled and have similar competencies, so that should have no impact on your selection of team members. As these individuals will be spending considerable time together, teamwork is paramount. Failure of the task force to function properly as a unit could derail the future success of Leader Corp.

Please provide a recommendation as to which 5 people should be assigned to the task force. Be prepared to justify your recommendation.

Give participants 10-15 minutes to select their team, then ask each group to present their slate of task force members. DO NOT allow them to explain their choice. We want all groups to present their slate before discussing it as a group.

When the groups are ready, invite them to share their selections.

Start Time:	9:50 am	End Time:	10:00 am	Duration:	10 minutes

Debrief
After the groups have presented their selections, use the following questions to process and debrief the exercise:
- Which personality type (Birkman dimension) did you think was most pertinent to the decision?
  - Why do you believe it was most important?
- What assumptions did you make about the "mood" or conditions that the task force would be operating within?
- How would the "mood" or sentiment of the group affect which personality type (Birkman dimension) you would consider most important?
- Did the purpose of the task force play into the decision?
- It is preferable to have four different behavioral strength patterns. What was the deciding factor for the fifth selection? Why?
- Did your personality type (Birkman color) cause you to vote for similarity or difference from your choice?
- Having a diverse group of personality types is important, but how might we also consider other characteristics of team members to assemble a successful team?
- How can diverse representation of identities and backgrounds influence the team dynamics and its overall success?

Successful teams can show up in many ways and whether you are choosing your team or not, as a leader it's important that you get to know your team members. Learn their strengths, their passions, how they bring their best self to the team each day. Knowing this allows you to leverage your team's talents and expertise to the fullest extent. In your role as President, this can show up in how you work with your fellow Executive Team members, which are elected alongside you. OR this could be how

you leverage the strengths of the members you assign to chair positions within the chapter. After graduation, this will show up in your career or even organizations that you choose to volunteer.

Feel free to end the session using the following thoughts:

Many of you may have heard the saying that a good leader surrounds themselves with people smarter than themselves. While that may be true, it doesn't matter how smart they are if they can't work together. A good leader must be able to put people in the roles or on the teams where they are most likely to succeed. You can have a group of rock stars, but if you don't assign them to the right teams, projects, or in the correct roles, you can still come up short of expectations. A great football team can't be made up of all Quarterbacks. You need to build out the team with all of the required players. In our world, we need our project teams or work units to balance all of the personality types.

Incentivizing, Motivating, and Accountability

Setting: Large Group
Duration: 30 minutes
Start Time: 10:10 am
End Time: 10:40 am

Overview

Moving team members forward requires leaders to incentivize and motivate their teams toward organizational priorities and hold them accountable to those priorities. To do this, leaders may need insights on how to initiate, institutionalize, and sustain positive behaviors. Motivating and incentivizing individuals is not a one-size-fits-all operation. To be effective, you need to recognize the differences between people and tailor incentives in order to properly motivate.

Unless you're in the Army, accountability isn't as simple as telling people what to do. We will explore methods to build a culture of accountability within your Chapter and how this relates to professional environments.

Objectives

- Learn the difference between Motivating and Incentivizing
- Learn the four different work styles and how people prefer to work

Brainstorm how to motivate members based on work style Activities and Items Needed

- How to Incentivize Me Report
- How to Motivate Me Report
- Organizational Focus Report

Room Setup

- Theater style

AV/Tech Needs

- Computer with wireless presentation remote
- Projector and screen
- Lavalier microphone for the lead facilitator
- 2 wireless microphones for use in the crowd

Content

Start Time:	10:10 am	End Time:	10:20 am	Duration:	10 minutes

Introduction
Participant Workbook pg. 29

Facilitators should transition from the topic of successful teams into Motivation and Incentives. Feel free to use the scripted opening below:

Now that we know how to build successful teams, let's talk about *how* we motivate and incentivize team members to achieve team goals and priorities . A good leader always takes account of the personality of individuals, collective dynamics, organizational priorities and self-awareness to stabilize, move and lead a group of people through incentivizing and motivating.

Incentivizing
Facilitator should describe what it means to incentivize: Capitalizing on the human competitive spirit to excel, a good leader uses incentives to **initiate** desired behaviors. Consider incentives to be low-hanging fruit for encouraging members to do what you want them to do.

We humans behave in a way that we are positively rewarded. Being positively rewarded is defined on a scale by these two polar opposite perspectives:
1. *A way to measure personal performances and assurance of personal advancement*
2. *An environment based on trust and team success*

Since the social norm is 50/50, incentives should reflect a sensitivity to both perspectives. An example of incentivizing may be the Chapter's incentive system or accolades at chapter meetings.

Facilitator should instruct students to look at their How to Incentivize Me report and pose the following questions to the audience:
- What are some incentives you provide to your chapter?
- What are some incentives that prompt you, personally, to do something?

Motivating
Moving team members forward requires insights on how to initiate, **institutionalize**, and sustain positive behaviors. Consider motivation to be the process of encouraging people to do what *they* want to do (that might also happen to correspond with what you want them to do).
- Creating an environment that supports self-motivation
- Institutionalizing positive behaviors by creating an environment and culture that motivates the team members

An example could be creating chapter-sponsored case-study teams, instating chapter-wide study tables, or creating a reward system for the member that raises the most philanthropic dollars. Motivation is more than just the reward for an action—it is creating a culture that supports members in the achievement of their goals.

Facilitator should prompt participants to look at their How to Motivate Me report and ask the following questions:

- What are some ways that you, personally, are motivated?
- How do you motivate people within your chapter?
- What differences are you noticing between how to incentivize and how to motivate people?

Start Time:	10:20 am	End Time:	10:25 am	Duration:	5 minutes

Introduction to Organizational Focus
Participant Workbook pg. 30

The challenge is to create and institutionalize a work environment and culture to support individual and collective self-motivation. Each personality type (Birkman Color) can also be used to describe work styles. In the same way that individuals have personal preferences, our members and colleagues each have a preference for the environment in which they prefer to work. Understanding these styles can help you motivate your team based on how they like to get things done:

Design/Strategy (BLUE) Motivators
- A work environment that emphasizes planning, innovating, and creating
- A culture of ideas, usually with a strong strategic focus

Design/Strategy (GREEN) Motivators
- A work environment that emphasizes selling, promoting, directing, and motivating others
- A communication-based culture designed to influence others

Operations/Technology (RED) Motivators
- A work environment that emphasizes a practical, hands-on approach, usually with a tactical focus
- A product-focused culture with a strong emphasis on implementation

Admin/Fiscal (YELLOW) Motivators
- A work environment that emphasizes standards, tracking, and quality assurance
- A culture based on efficient procedures and policies

Facilitator should teach students how to read their Organizational Focus bars, using their Organizational Focus Reports and the accompanying slide.

Start Time:	10:25 am	End Time:	10:35 am	Duration:	10 minutes

Organizational Focus Brainstorm
Tell members that you're going to pose some questions for them to discuss and then allow them to move around and discuss with others. Introduce the questions, first:
- How does your work style inform what you already know about how you like to work?
- What are your biggest pet-peeves within this work style?
- What is most productive for you in this work style?
- What happens when you are forced to work outside of this style? (Think back to the Photo Finish activity)

Instruct members to move to the corner labeled to match their bottom bar to talk to others with their same style. Give participants about ten minutes to discuss before closing the session.

Start Time:	10:35 am	End Time:	10:40 am	Duration:	5 minutes

Conclusion
- Facilitator should close the session by helping students make the connection between what THEY need in order to feel motivated to what OTHERS might need—especially if it's different from them. Use the points below: Incentives are great if you need to quickly move others from point A to point B
  - Most people like incentives, but they don't prompt much beyond the immediate task
- Motivation is a more sustainable practice, but it requires that you learn about your team
- Creating systems that allow for multiple working styles is a good start. We've even seen the trend over the past couple of years both within education and professional settings, administrators and employers being more flexible with work schedules and environments to promote productivity and satisfaction within their teams.

The next session will help participants put this into practice.

Incentivizing, Motivating, and Accountability

Setting: Small Group
Duration: 60 minutes
Start Time: 10:50 am
End Time: 11:50 pm

Overview

The purpose of this small group session is to translate the abstract concepts of incentivizing and motivating people with different work styles into real world business scenarios. Participants will have to think critically about the needs and motivations of people with different work-style preferences and design a business that meets the needs of those work styles. Groups will then work together to create an imaginary company that effectively meets the needs of all work styles.

Objectives

● Demonstrate knowledge of the 4 different personality type, work styles
● Apply work style considerations to business design

Activities and Items Needed

● 4 pages from a flip chart
● Flip chart markers (at least 4)
● May also want to refer back to the Collaborative Model on Participant Workbook pg. 26
  o The process colors in the Collaborative Model coincide with work-style colors and can indicate where people might feel comfortable contributing to projects

Room Setup

● Chairs in a circle with space for individual groups to break out

AV/Tech Needs

● None

Content

Start Time:	10:50 am	End Time:	10:55 am	Duration:	5 minutes
Introduction *Participant Workbook pg. 30* We just heard about the differences between people and how those differences make it difficult to create a universal system of motivating and incentivizing. During this session, we will explore what this means in the business world.					

Facilitator may use the following questions to gauge the group's understanding of work styles and how to apply them:

- How are you feeling about the concept of personality-based motivators and work style preferences?
    - o Look to have a conversation about the differences between people's preferences—the main idea here is that not everyone likes to work in the same way. This seems basic, but many students (and adults) assume that everyone views the world (and work) the way they do.
- How does your preferred personality type, work style inform what you already know about how you like to work?
    - o Differentiate from Interests, here, in that work style refers to HOW they prefer to do what they are interested in. Ex. Someone who is a Planner (Blue Interest) and Organizer (Red Org Focus) would prefer to do Blue things in a Red way.
- Looking back on the Collaborative Model, what similarities and new ideas can you draw between the model and the concept of work styles?
    - o Look for participants to connect specific types of tasks with specific work styles.

Once the group is clear on organizational fit/work styles, facilitator should move to the next activity. If the group has questions, spend time clarifying before moving on. It's important that participants understand their own work style before moving on, since the rest of the session will ask them to consider OTHERS' work styles.

Start Time:	10:55 am	End Time:	11:15 am	Duration:	20 minutes

Business Design based on Work Style
Participant Workbook pg. 31

During this activity, participants will practice using their knowledge of work styles to design business processes that would motivate workers that fall into a particular style. Use the first five minutes to get participants talking about different types of work environments, business practices, reporting structures, etc. When it's clear they have a good grasp of the business operations landscape, introduce the activity.

Begin the conversation using the following questions:
- What are some of the differences in work environments?
    - o (Consider what it's like working for a tech company like Facebook or Amazon to working in a more traditional field like banking. What about marketing or design? What about running a manufacturing business?)
- What are some of the differences between how companies are run?
    - o (Consider reporting structure, whether employees are hourly or salaried, whether they sell a good or a service, etc.)
- How might these differences be seen in the physical office space or layout of a company/business?
    - o (Consider traditional cubicle-style layouts, open floor plans, or completely remote office work.)

Solicit responses from the small group. You may get answers such as:
- Physical layout of the office
- Company culture
- Leadership style
- Management style
- Benefit offerings
- Nature of the job
- Ownership structure

Ask participants to elaborate and give examples. Feel free to use the ideas below to help them flesh out their thoughts:
- Physical layout of the office
    - Cube farm, Open concept, Halls and offices, remote home office or co-working space
- Company culture
    - Company as a community
    - Constellation of stars
    - Not just a company, a cause
    - Customer service based; Sales based; Task or project oriented
    - Emphasis on hierarchy; Emphasis on innovation
    - Empowerment
- Leadership style
    - Member of the team, hands-on
    - Ivory tower
    - Emotional
    - Decision-making process
        - Top-down vs. Consensus
        - The concept of accountability is key
- Management style
    - Delegative
    - Micro-managerial
- Benefit offerings
    - Work/life balance
    - Flexible schedules
    - Work from home
    - Compensation scheme
- Nature of the job
    - Lots of travel
    - 9 to 5; Predictable
    - Flexible
    - Project-based
    - Standard, repeating tasks

When it's clear that students have a good understanding of the business concepts they can bring to the exercise, move into the activity (10-15 min.):

1. Break participants into workstyle (color)-groups based on their organizational fit/work style color (their bottom bar). (If there is only one of a color, pair reds with yellows and blues with greens.)
2. Each group is responsible for creating a business portfolio that caters to the work style opposite their own (Blue creates for Red; Green creates for Yellow; Red creates for Blue; Yellow creates for Green.)
    a. The idea here is that each group must think outside of their own needs and perspectives of the world. Rather than creating spaces that are suited to what THEY need, they must think about how to include others.
3. The portfolio each group creates must include (write on the flip chart, if they need help remembering):
    a. A specific business function
    b. A reporting structure
    c. An office layout/floor plan (to be drawn on flip chart paper)
    d. A sample meeting agenda

At the end of portfolio creation, each group should be able to explain how their portfolio caters specifically to that work style (color).

Start Time:	11:15 am	End Time:	11:25 pm	Duration:	10 minutes

Portfolio Presentation

Invite each working group to present their portfolio and explain why they made the choices they made. They should be able to justify each business choice with how it would positively affect the work style color they represent. Use the following questions to prompt their thinking:

- Why is this business function specific to this particular working style?
    - What tasks are included in this function that make it suitable for someone of this style?
- How does this reporting structure benefit this work style?
- What about this floorplan makes work easier or better for someone in this style?
- How does this meeting agenda cater to someone in this style?
- This business is specifically catered to one work style. Which work style might feel uncomfortable working in this environment, and why?

Start Time:	11:25 pm	End Time:	11:40 pm	Duration:	15 minutes

Group Design

After all 4 group discussions have occurred, the facilitator should explain that although it's important to understand each person's individual work style, it would be rare to work in a company with only one type of person. As a leader, it's important to be able to motivate people in all types of work styles.

Now, the larger group will collectively combine/create a new business portfolio that can accommodate all four work styles. Use the following questions to prompt their thinking:

- Which business functions are represented by which work style, and how can all of them co-exist in the same company?
- What business processes can be tweaked to motivate the most people?
- How can physical space be manipulated to motivate team members, employees, and workers?
- How can a meeting be structured to suit the needs of all involved?

Write/draw their answers on a piece of flip chart paper.

Start Time:	11:40 pm	End Time:	11:50 pm	Duration:	10 minutes

Debrief and Conclusion

After the group has considered business practices that create the best environment for many different types of people, use the following questions to help them make final connections:
- Without knowing the organizational fit of people in your chapter or future company, how can you tell what might motivate them in an organization?
  - (Look for answers that include observing the behavior of others. Are they someone who needs lots of time to think and likes to talk about broad ideas, or are they someone who likes to work with their hands and just get things done? [Blue vs. Red] Are they someone who is always social, or are they a bit quieter and prefer to work alone? [Green vs. Yellow])
- Based on your experience with this exercise, how is motivation different from incentives?
  - (In this exercise, they practiced building a system that supports what others need [motivation], whereas incentives are overlaid on top of systems and don't necessarily require any knowledge of someone's needs.)
- How do you think you can use this in your chapter? Your future career?

People are unique and have unique needs. You need to consider the personalities of your team and create an environment that will meet their needs so that they live up to their potential.

You don't have to be taught to manage people like yourself. You understand yourself. You need to learn how to manage people differently than you because that will encompass 75% of the world.

Plaid Organizational Focus Overview

Red
OPERATIONS / TECHNOLOGY

- A work environment that emphasizes a practical, hands-on approach, usually with a tactical focus.

- A product-focused culture with strong emphasis on implementation.

Green
DESIGN/STRATEGY

- A work environment that emphasizes selling, promoting, directing, and motivating others.

- A communication-based culture designed to influence others.

Yellow
ADMIN/FISCAL

- A work environment that emphasizes standards, tracking, and quality assurance.

- A culture based on efficient procedures and policies

Blue
DESIGN/STRATEGY

- A work environment that emphasizes planning, innovating, and creating

- A culture of ideas, usually with a strong strategic focus.

Understanding Organizational Purpose and Principles

Setting: Large Group
Duration: 30 minutes
Start Time: 12:00 am
End Time: 12:30 am

Overview

Organizations by nature are always in a state of flux due to their fluid environment, both internal and external. Successful organizations have stabilizing points or Lodestars to provide structure and support for organizational beliefs.

- Organizational Focus (Purpose)
- Organizational Culture (Principles)
- Organizational Function (Performance)

This session will explore how knowledge of and adherence to organizational lodestars will assist participants in both leading their Chapter and in their careers.

Objectives

- Learn about organizational lodestars (what they are)
- Identify Delta Sigma Pi's lodestars
- Learn the role of leadership within the context of organizational lodestars

Activities and Items Needed

- Participant workbooks
- Lodestar signs to hang

Room Setup

- Theater style
- Hang the Focus, Culture, and Operations signs in three separate, distinct areas at the outer edges of the room (students will be moving to stand by the signs, so there needs to be clear space between each group).

AV/Tech Needs

- Computer with wireless presentation remote
- Projector and screen
- Lavalier microphone for the lead facilitator
- 2 wireless microphones for use in the crowd

Content

Start Time:	12:00 pm	End Time:	12:05 pm	Duration:	5 minutes

Introduction (What is a Lodestar?)
Participant Workbook pg. 33-34

Organizations, by nature, are always in a state of flux due to their fluid environment, both internal and external. Successful organizations have stabilizing points or Lodestars to provide structure and support for organizational beliefs.

Facilitator should ask the crowd if anyone has ever heard of a lodestar.
● Who here has heard of a lodestar, before?
● What is a lodestar?

Take responses from the crowd before explaining that:
● A lodestar is literally a guiding star. Historically, lodestars were stars in the sky, like the North Star, that guided trading ships and others on their journey. A lodestar can also mean an inspiration, model, or guide. Whether it be Viking explorers at sea or slaves escaping to freedom, lodestars have been guiding people for centuries.

Lodestars are also useful in a business sense, helping to guide companies and organizations on their path to success. Plaid company Founder, Wilson Wong, has identified the three main lodestars that we believe must be present for companies and organizations to achieve true success:
● Organizational Focus (Purpose)
● Organizational Culture (Principles)
● Organizational Function (Performance)

Organizational Lodestars

FOCUS
(PURPOSE)

MISSION
VISION
GOALS

LEADERSHIP
(RELATIONSHIP)

AUTHENTICITY
SHARED VALUES
COLLABORATIVE RELATIONSHIPS
COLLECTIVE ACTION

CULTURE
(PRINCIPLES)

VALUES
HISTORY
RITUAL

OPERATION
(PERFORMANCE)

SCHOOL STANDARDS
CHAPTER STANDARDS
RECRUITMENT POLICIES & PROCEDURES

Lodestar Model: Jackson, Wong & Associates, 2000

Start Time:	12:05 pm	End Time:	12:15 pm	Duration:	10 minutes

Your Organizational Lodestars
Participant Workbook pg. 34-35

Facilitator should describe each organizational lodestar, as identified by Plaid, and then review DSP's specific lodestars.

Organizational Focus (Purpose)
A directional compass and tactical strategy that maps what an organization plans to do. Your Focus, or purpose, is what your organization exists to do. What is your sole reason for existing as a fraternity, organization, or business? That's your Focus.

"Successful organizations have a clearly defined and articulated vision, mission, and goals."

Most often, purpose comes in the form of a Vision & Mission, which are the conceptual direction of an organization. The vision is the compass and the mission is the broad roadmap.

Facilitator should ask participants: *What is vision?*

Take participant responses and then explain that:
● A vision statement focuses on tomorrow and what an organization wants to become or achieve. It describes what a changed world will look like if the mission is achieved. It often has an emotional appeal or includes imagery.

Should a vision ever be completely obtainable? No, because a vision should continuously push the organization towards new frontiers. A vision is like the North Star. Clear, concise, and although you can return to it again and again, you never quite reach it.

Facilitator should ask participants: *What is a mission? How is it different from the vision?*

Take participant responses and then explain that:
● A mission statement focuses on today and what the organization does. It drives the organization, it's what you do, your core objectives, and what steps you take to meet those objectives. A mission statement defines the ends of the organization. Facilitator should ask participants if they know DSP's vision or mission. Take responses, and then show them their vision and mission:
● **Deltasig Vision:** Delta Sigma Pi is the foremost business fraternity providing a lifetime of opportunity for our members.
● **Deltasig Mission/Purpose:** Delta Sigma Pi is a professional fraternity organized to foster the study of business in universities; to encourage scholarship, social activity and the association of students for their mutual advancement by research and practice; to promote closer affiliation between the commercial world and students of commerce, and to further a higher standard of commercial ethics and culture and the civic and commercial welfare of the community.

<u>Organizational Culture (Principles)</u>
Facilitator should transition into describing the next lodestar: Culture. The organizational culture is the tone or moral compass of an organization. The organizational culture plays a significant role in decision making and setting priorities. An organizations' Core Values fall into this area. Your principles are used to make decisions that may be ethical in nature or involve competing values.

Ask participants:
● What are Deltasig's core values?

Take responses, then show them their core values.

It's also important to note that organizational culture is highly influenced by organizational behaviors and actions (or lack of action). Organizations can state their core values, but if decisions made by leadership or the actions of team members are incongruent with the core values, that tells a very different organizational culture.

An organization's understanding and practice of the principles is a great time to consider how well the organization's principles align with inclusive and equitable practices for the team.

<u>Operations Function (Performance)</u>
The Organizational Function is the operational performance of an organization. This is the concrete, rubber-hits-the-road part of an organization. This is HOW you do what you are meant to do.

Examples include:
● Standard Operating Procedures
● Risk Management Policy
● Officer Structure
● New Member Education Program

Start Time:	12:15 pm	End Time:	12:25 pm	Duration:	10 minutes

The Most Important Lodestar
Now that students have an understanding of what their lodestars are, invite them to think about which one is most important. Use the following prompts/instructions:
● You're now going to decide individually, and as a group, which lodestar is most important.
● Notice the lodestar signs around the room, and think about which lodestar is most important for the team you currently or will lead. (Focus, Culture or Operations)
  o When you've made your decision, stand and walk to the sign that represents the lodestar you select.

Give students time to select. Verbalize any observations you deem important about which lodestar students select. Ask members at each lodestar:
● Why do you think this lodestar is the most important?
● What makes this lodestar more important than the others?

After participants have explained their choices (and if there's time), take the exercise a step further by asking participants to encourage others to switch lodestars. Now they not only have to justify their own choice, but communicate why others should choose it as well. Use the following questions:
- Who believes in their lodestar so much that they would make a case for others to choose it, as well?
- Who will try to convince others to change their mind and leave their lodestar in favor of yours?

Allow time for participants to switch locations, if desired, then transition to the next section.

Start Time:	12:25 pm	End Time:	12:30 pm	Duration:	5 minutes

Leadership (Relationships)
Introduce the concept of leadership by asking participants:
- *There is still one major component missing for organization success, what is it?*

Take a few participant answers before instructing all participants to move back to the middle of the room. The final component for organizational success is leadership (hold up the final Leadership sign as a visual), and it's the leader's responsibility to move members of their organization or company toward ALL THREE lodestars—not just one.
- All participants are correct in that the lodestar they selected is important, but none of them is THE MOST important. All Lodestars have to be present for true, seamless success.

Basically, Leadership is:
- Understanding, owning, teaching, and expecting from others the Lodestars of the organization
- Bringing positive dynamics and cohesiveness to the team
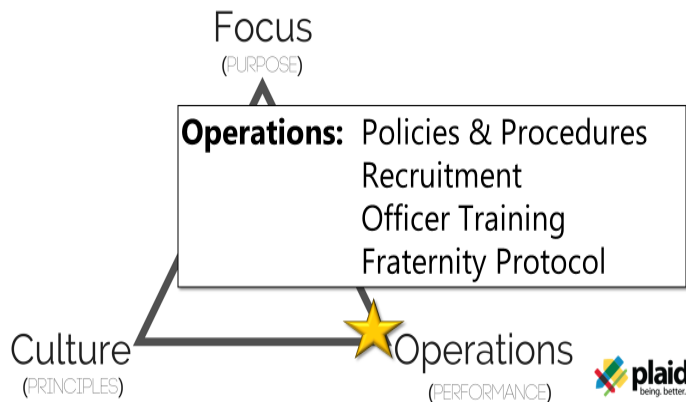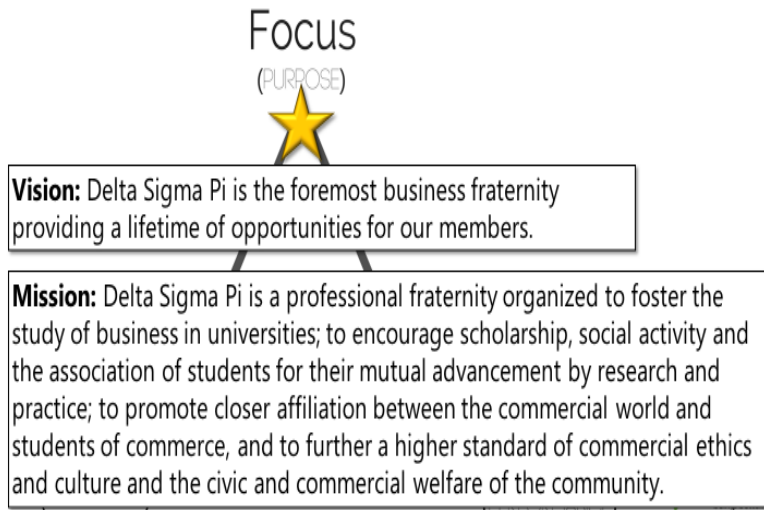- Moving the team members toward the organizational Lodestars

Conclusion
Facilitator may use the following anecdote to describe the importance of lodestars:
There once was a man standing along a country road when an angry mob ran by headed toward town. As they ran by, pitchforks and torches in hand, the man exclaimed, "please tell me where you are going so that I can lead you."

"Without the 3 lodestars, you, your chapter, or your business is like that mob. Held together merely by momentum, but devoid of cohesive aims. As their leader, you may as well be that man on the side of the road. Lodestars keep your eye on the prize and promote long-term, sustained success even through leadership, and team member changes." While your chapter may have your own self-defined goals, ultimately Delta Sigma Pi at the local, chapter level and at the national level should be utilizing the same three lodestars to guide the organization.

Presentation Notes for Reference:

Focus
(PURPOSE)

Vision: Delta Sigma Pi is the foremost business fraternity providing a lifetime of opportunities for our members.

Mission: Delta Sigma Pi is a professional fraternity organized to foster the study of business in universities; to encourage scholarship, social activity and the association of students for their mutual advancement by research and practice; to promote closer affiliation between the commercial world and students of commerce, and to further a higher standard of commercial ethics and culture and the civic and commercial welfare of the community.

Focus

Values: Diversity
Service
Leadership
Professional Training
Giving

Culture
(PRINCIPLES)

Operations
(PERFORMANCE)

plaid
being. better.

Focus
(PURPOSE)

Operations: Policies & Procedures
Recruitment
Officer Training
Fraternity Protocol

Culture
(PRINCIPLES)

Operations
(PERFORMANCE)

plaid
being. better.

State of the Fraternity with Grand President, Cory Stopka and Leadership Panel

Setting: Lunch
Duration: 80 minutes
Start Time: 12:30 pm
End Time: 1:50 pm

Overview

This session is designed for the leadership of the Fraternity to present the State of the Fraternity to its members.

Objectives

- Review the current state of Deltasig
- Discuss IDP changes, Ritual, LEAD, GCC prep to attend (legislation, elections, etc…), Nominations/Elections)

Activities and Items Needed

- None

Room Setup

- Rounds for Lunch Service

AV/Tech Needs

- Computer with wireless presentation remote
- Projector and screen
- Microphone for the lead facilitator
- Podium
- Wireless Microphone

Content

Start Time	12:30 pm	End Time	1:00 pm	Duration	30 min.
Lunch Buffet					
Start Time	1:00 pm	End Time	1:15 pm	Duration	15 min.

State of the Fraternity by Cory Stopka

Welcome
- 5th year
- In Person
- Comments on Interactions

Plan for State of Fraternity
- Review of the event
- Where we were
- Where we are
- Where we are going

Purpose, History, and Impact of the Event
- CEO level training (still look at Baltimore notes)
- 5th Year – varying steadfast items along with improvements (help by giving specific examples)
- What can you bring to campus now and your future career and leadership
- Impact of donors

Where we Were
- Need to keep this short
- High level

Where we are
- Setting new culture
- Enrollment and chapter numbers – tease expansion
- IDP Progress
- DEI Task Force Conclusion and Future
- Key Stakeholders – Collegiate Voice: CAC, LEAD President Convos, Chapter EC/Officer review/rec(s) Committee Membership, CDL
- CO Staff Additions and Transitions – Focus on LF, Education, Expansion, Capacity
- Strategic Priorities – Recap Dashboard and local/chapter impact, Updates to anything not yet mentioned

Where we are going
- Continue next steps with Strategic Priorities
- Board/Build the Bench Development of future leaders at every level, starting with PA
- Review/Consultant in January Meeting with Governance, Structure, Leadership development, inclusion – emphasize committee of whole from GCC, but acknowledge more inclusion and

feedback is needed from beyond that group, reference progress since GCC (i.e. prioritization of efforts/tasks/ideas)
- Expansion in NW and beyond, remind of enrollment cliff – positive and motivating, not detrimental
- Campus environment ever changing, utilizing relevant experiences and resources, exploring new opportunities
- Overall vision is board/"nationals" (work on wording here) to focus on strategy to provide direction, decide on best structure and resources to build our future (attendee reference), and set us apart from other organizations while remaining a leader who is also collaborative

Closing
- Recap where we were, where we are, and where we are going
- Emphasis on acknowledgement of current trends, asking for feedback
- Plea/desire for understanding to have others remain involved and future leaders (i.e. roles, titles, responsibilities, barriers, missing resources, etc)
- Fraternity is strong in all/many ways (highlight some to emphasize credibility)
- End with excitement and desire for future relationship/conversation(s)
- Positive/Inspirational Quote

[SMILE AND PAUSE TO ENJOY AND/OR EMPHASIZE]

Start Time	1:15 pm	End Time	1:50 pm	Duration	35 min.

Leadership Panel -
- Cory Stopka – Grand President
- Jodi Schoh – VP-Finance
- Brennen Feder – 2021 Collegian of the Year
- Jeremy Levine – Executive Director

Putting the Strategy in Strategic Planning

Setting: Small Group
Duration: 75 minutes
Date: Saturday, January 15, 2022
Start Time: 2:00 pm
End Time: 3:15 pm

Overview

Leading without a plan is like navigating without a map or compass. In fact, some would argue that in the absence of a plan, a leader isn't leading at all. To lead, you need to have a destination in mind and an idea of what strengths you can draw on to get there. In this session, we will discuss processes for developing a strategy that not only provides direction and focus but also aids in accountability, engagement, and motivation.

Objectives

- Review the leading practices for landscape assessment, strategy development, and implementation planning

- Identify steps to engage the chapter and Fraternity volunteers in these processes

Activities and Items Needed

- Strategic Planning workbook pages 36-46

AV/Tech Needs

- N/A

Content

Start Time:	2:00 pm	End Time:	2:05 pm	Duration:	5 minutes

Introduction – Strategy versus Planning
Acknowledge that each chapter probably has a process in place for planning and assigning tasks. Then ask how well can chapter members articulate and motivate people around the <u>why</u> behind those plans? How quickly can your chapter adjust your plans in response to a disruption? How effectively can you prioritize among those plans when resources (people, time, money, etc.) are short?

What we're getting at here is **strategy**, defined as how a team leverages its unique strengths to advance its purpose. **Strategy is a choice** and provides clarity on where you will focus your efforts – and where you will not.

In comparison, **planning** is how a team operationalizes that strategy and holds itself accountable for results.

As you can see in the example in your workbook (pg. 37), a strengths-based strategy can provide the direction and motivation to guide activities and operations such as recruitment, new member education, professional development, finance, fundraising, community and university service, and faculty and alumni relations.

Today, we'll cover three phases of strategic planning:
- Assessing the landscape
- Deciding on your strategy
- Developing implementation goals and plans

Start Time:	2:05 pm	End Time:	2:20 pm	Duration:	15 minutes

Participant Workbook pg. 39

Assessing the Landscape

As we've all seen in the past few years, the world can change quickly. Effective strategy is rooted in an understanding of the landscape impacting your team and its purpose.

Ask participants how a landscape assessment might lead to a good strategy.

With a clear understanding of the context in which your team is operating, you can identify important challenges or opportunities, as well as which of your strengths you can draw on for the greatest chance of success.

We'll break the landscape assessment into two analyses: one of trends and one of other players in your field.

Trends may be at multiple levels: national Fraternity, regional Fraternity, chapter, campus, local community, etc. And they may be in various categories, such as demographic, social, or economic. In analyzing trends, consider both the trend and the implications for your chapter.

Let's take an example: You have learned that student enrollment in your school of business is increasing. So you have identified a trend, but what are the implications?
- How might that trend create positive opportunities for your chapter?
- How might it pose challenges?

Now let's talk about **players**. Why might it be helpful to understand who else is in your field?

By understanding the focus and strengths of other players, you can hone in on which of your team's strengths bring united value and what types of collaborations you might pursue with organizations that have complementary strengths.

There are four different types of players in a given field.

- *Peer Organizations* have the same focus as yours — they do what you do in the same places you do it. What might be some examples of peer organizations for your chapter? [These are most likely other business/economics-focused student organizations.]
- *Substitute Organizations* meet the same needs that you meet, but in a different way. What might be some examples? [Substitutes are most likely other organizations providing opportunities for professional or personal growth, service, relationships with other students and the community, etc.]
- *Resource Competitors* have a different focus than your team, but compete with you for resources. What might be some examples? [Competitors are most likely other organizations seeking the same students, facilities, volunteers, faculty members, or campus/community attention, etc., such as athletic teams, arts groups, student publications, the alumni association, etc.]
- *Adversaries* are actively opposed to your purpose and may advance a vision of impact that is in conflict with your own. While you may spend much of your time working to counter their efforts, often there is something you can learn from what makes them effective. [It is unlikely that a Delta Sigma Pi chapter would have adversaries, but some students may be involved with political or social organizations that do.]

Ask participants to assess important elements of their chapter's landscape, using the template on page 40 of the participant workbook. They may choose to identify trends and their implications, players and their strengths, or a combination. After about 5 minutes, ask participants to share their analyses in pairs or groups of three. Encourage them to ask probing questions of the student who is sharing.

Ask each participant to share with the full group one item from their analysis.

Start Time:	2:20 pm	End Time:	2:50 pm	Duration:	30 minutes

Participant Workbook pg. 41

Deciding on Your Strategy

Now that we understand the context of our landscape, we can begin determining our strategy. Ask if participants recall our definition of strategy. [*Strategy is how a team leverages its unique strengths to advance its purpose.*] With this definition in mind, we'll determine our strategy using three steps:
- Identify our team's value proposition
- Name our decision-making criteria
- Identify — and answer —our most important strategic question

Value Proposition
Let's start with value proposition. Put another way, which of your team's core strengths set you apart from other players in ways that your intended audiences value? Often these strengths take the form of either asset or execution strengths.

- Some strengths take the form of a unique asset, such as "through a unique asset, such as a particular location or facility, a proprietary process or technology, a massive and difficult to replicate "head start," or even a specific, sought-after individual.
- Other strengths include better execution of activities, programs, service delivery, or management functions than others in your field.
- See page 42 in the Participant Workbook for a sample list of asset and execution strengths (Also listed below)

Asset strengths could include the following:
- Better product, program, or service design leading to better outcomes or experiences
- Unique attributes of products, programs, or services
- An accessible location or network of locations
- An attractive or specialized building or property that enhances product/program/service delivery and participant experience
- A robust, diversified revenue base that provides flexibility and stability
- Great name recognition and reputation among supporters and customers/constituents
- Powerful partnerships with other groups or organizations
- Well-connected leaders

Execution strengths could include the following:
- Lower costs to customers/constituents
- Greater efficiency in delivering products, programs, or services per dollar spent
- Faster delivery of product, programs, or services (e.g., no waiting for service)
- Sound marketing and communications that raise visibility and awareness
- Better accountability, reporting, and storytelling
- Accessible/multilingual materials

Ask participants to write down their chapter's value proposition and then share in pairs or groups of three (page 43 in workbook). As each student shares, encourage those listening to ask probing questions to help determine if the strength being shared is truly differentiating, present in the chapter now (rather than aspirational), and of value to the chapter's stakeholders. Participants may choose to revise their value proposition based on the peer feedback.

Ask each participant to share their value proposition with the full group.

Decision-Making Criteria

Now that we know what makes you uniquely valued, let's shift to creating decision-making criteria.

Ask why it may be valuable to have written decision-making criteria in advance of deciding on a strategy. Ask who has experienced decisions where:
- The needs of a key stakeholder group were overlooked or ignored?
- There was insufficient preparation or information gathered in advance to lead to an informed decision?
- The discussion on the decision was unfocused or stuck on irrelevant topics?

- People argued based on their emotions or attachment to a position rather than focusing on what would be best aligned with the group's lodestars?
- After a decision was made, leaders struggled to explain the rationale to those impacted?

Developing a set of decision-making criteria before the need arises ensures the most relevant information is gathered in advance, roots a decision in the organization's lodestars, and provides clear rationale about the decision to share with those impacted.

Predetermined decision-making criteria can be especially helpful during a crisis situation, where a decision must be made quickly and with limited information.

It is important that the criteria are broad enough to apply to many types of decisions. Criteria that are too narrow will fail to be useful in all but very specific situations.

Page 44 of the workbook includes some sample decision criteria. Ask participants which resonate most with them. What criteria seems missing that might help their chapter's deliberations?

Ask each participant to write down up to five items for their chapter to consider as decision-making criteria.

Strategic Questions

As mentioned before, **strategy is a choice**. In fact, an easy way to think of making a good choice is the following equation:

The Right Question + Clear Decision Criteria + Relevant Information = Good Decision

We've covered decision criteria and relevant information, now let's talk about asking the right question.

There are undoubtedly lots of important questions facing any team. But often, answering the most strategic question provides the clarity that can enable the team to answer downstream questions. **The answer to your most strategic question is your strategy.** In fact, the answer to your strategic question doesn't just provide guidance on what your chapter will do, but it also helps make clear to everyone what is not worth doing.

Ask participants to think about what opportunities or challenges most require their chapter's focus and to write them down in the form of strategic questions. Ask each student to share their potential strategic questions with the full group, as well as their initial thoughts on the potential answers the chapter may land on for each.

Examples of chapter-related strategic questions may be:
- What are the implications for our chapter's operations of the new campus policy on _____?

- How can we most effectively support the career and professional development needs of students across the business school?
- What must we do to secure the ability to manage concessions for the athletic department for the upcoming season?
- How do we most effectively update our operations to support the hybrid (in-person and remote) student body climate?
- What approach to university and community service best aligns with our lodestars and identity on campus?
- How must we adjust our operations now that there is a new Alpha Kappa Psi chapter on campus?

Start Time:	2:50 pm	End Time:	3:05 pm	Duration:	15 minutes

Participant Workbook pg. 45-46

Implementation Goals and Plans
Once you are clear on your strategy, it is time to develop goals and organize them into a plan.
- What is an example of a time when you made a goal but never completed it?
- What prevented your completion of the goal?
  - (Answers will probably focus on lack of follow-through, no end-date set, no clear plan for how to achieve the goal, etc.)
- Now think of a time you successfully achieved a goal. What planning elements did you find most helpful?

Ask who in the group is familiar with the concept of SMARTIE Goals and can define what the acronym means. If any have used SMARTIE goals before, ask how they experienced it.

SMARTIE stands for:

- Specific
- Measurable
- Attainable
- Relevant or Realistic
- Time-Based
- Inclusive
- Equitable

While SMART Goals have been around for a while, more and more groups are adding Inclusion and Equity to their goal setting. What are some ways you might include inclusivity and equity in your goal setting?

Ask participants to reflect on their strategic question and its answer, and draft one or more SMARTIE goals. After reflection, ask them to share in pairs or groups of three.

Start Time:	3:05 pm	End Time:	3:15 pm	Duration:	10 minutes

Debrief and Conclusion
You now have the building blocks and some techniques for assessing your landscape, developing a guiding strategy, and creating implementation goals and plans. While you've worked today as a team of one, the most effective leaders engage their teams throughout each of these processes to ensure the strategy and plans have the best chances of success.

Ask:

- How might you start the strategic planning process with your chapter?
- What challenges do you anticipate?
- What support might you need?
- How might you engage your faculty advisor and national officers?

Encourage participants to meet soon after the Academy with their chapters and faculty/alumni volunteers to design a process to engage the full chapter in developing a strategy and plans for the remainder of the term. Remind them that even the best strategies and plans will fail if the team doesn't feel bought into them; the importance of working with the chapter to agree on the path forward can't be understated.

TENETS OF DELTA SIGMA PI FOR FACILITATOR REFERENCE:

Purpose, Mission, and Core Values of Delta Sigma Pi

We believe that the primary purpose of a business fraternity is to prepare students to be ethical leaders in their careers, but membership in Delta Sigma Pi extends far beyond the undergraduate experience. We are known as the foremost business fraternity because we equip our members throughout their lives to achieve maximum impact in their studies, careers, communities, civic involvement, and personal relationships. We subscribe to a set of guiding principles as stated in our Ritual.

Our Purpose as a Business Fraternity

Delta Sigma Pi is a professional fraternity organized to foster the study of business in universities; to encourage scholarship, social activity and the association of students for their mutual advancement by research and practice; to promote closer affiliation between the commercial world and students of commerce, and to further a higher standard of commercial ethics and culture and the civic and commercial welfare of the community.

Professional Development

Delta Sigma Pi employs a rigorous program of professional development for our members, beginning with collegiate membership and continuing for life. Our members enjoy high-quality training, frequent events with business and cultural leaders, opportunities to mentor and be mentored by leaders in their fields, and supportive friendships that strengthen both professional and personal success and fulfillment.

Diversity and Ethics

Our Fraternity is uniquely committed to diversity in all of our chapters. As the nation's first co-ed business fraternity and one of the most diverse Greek organizations, Delta Sigma Pi believes that individuals and organizations benefit from a wide range of perspectives, and we cultivate a culture of respect that broadens our viewpoints and makes us stronger and more effective leaders in our fields. Our training and events focus on fostering respectful, sound, ethical standards that are inclusive yet principled.

Service and Philanthropy

Delta Sigma Pi members learn to cultivate an attitude of service to our communities, supporting the cultural and civic organizations that impact the lives of individuals and families wherever we live with our time, talents, and treasure. This commitment to philanthropy and service characterizes our alumni and collegiate chapters.

Leadership

With numerous opportunities to build leadership skills through training, conferences, and holding local or national offices, Delta Sigma Pi members are groomed to be leaders and continue to grow their leadership skills throughout their careers. Throughout Delta Sigma Pi's leadership education, we emphasize ethical leadership that leads to lasting impact.

Social

Delta Sigma Pi is a great way to build lifelong friendships and develop an extensive network of other business professionals. At Fraternity events, you'll make connections with other collegiate and alumni members, and no matter where you go, you can count on your Delta Sigma Pi brothers to support you both personally and professionally.

What is the purpose of a business fraternity? At Delta Sigma Pi, we believe that our purpose is to foster and support a lifelong commitment to excellence in both our personal and professional lives as we seek to make a difference in business, our communities and the world at large.

Navigating Difficult Conversations

Setting: Large Group
Duration: 45 minutes
Start Time: 3:35 pm
End Time: 4:20 pm

Overview

As we mobilize our teams forward with shared lodestars, there are times when unclear and conflicting strategies produce relationship dysfunctions. Having that crucial conversation during difficult situations always seems to be troublesome. We may sometimes tend to become argumentative, emotional, passively aggressive, or just avoid getting to the heart of the matter. Why do we have such difficulties? This interactive workshop is designed to provide insights to help you navigate through challenging conflict moments in your organization.

Objectives

- Identify and learn to manage individual stress and fears about conflict
- Learn about the needs and stress of others in conflict

Activities & Items Needed

- Handling Conflict Report

Room Setup

- Theater style in four distinct quadrants, if possible (to match the Birkman map)
- Birkman color wall signs to label each quadrant
  - Participants should seat themselves according to Needs/Stress color

AV/Tech Needs

- Computer with wireless presentation remote
- Projector and screen
- Lavalier microphone for the lead facilitator
- 2 wireless microphones for use in the crowd

Content

Start Time:	3:35 pm	End Time:	3:45 pm	Duration:	10 minutes

Introduction
Participant Workbook pg. 48

Having that crucial conversation during difficult situations always seems to be troublesome. We may sometimes tend to become argumentative, emotional, passive aggressive, or just avoid getting to the heart of the matter. Why do we have such difficulties? This interactive workshop is designed to provide insights to help you navigate through challenging conflict moments.

The primary reason for the worry is that we do not know what or how the conversation will play out.

　　We need to:

- Develop a sense of trust as a foundation to have a safe and collaborative discussion.
- Understand that others probably have a different perceptual filter than self.
- Experience the dynamics of opposing stress reactions in uncomfortable situations.
- Adjust our approach on how to relate with others who may have a different perceptual filter.

In order to do this, it can be helpful to first understand the basics of conflict. Conflict is the result of unmet needs.

- Prompt students to think back to how good days and bad days are determined—by whether or not needs are met. Conflict is a reflection of that.

　Conflict Activity
　Conflict comes in as many ways, shapes, and forms as there are needs. It can occur very quickly or be resolved very quickly. It all depends on how we approach the situation. As an example, let's play a quick game.
- Everyone stand up and grab a partner next to you. We're going to play a game called Something, Nothing, Anything.
- This game is like Rock, Paper, Scissors, except that you'll say "Something, Nothing, Anything," and after "Anything" you'll blurt out a noun (person, place, or thing).
- After both partners have said their word, you must determine whose noun is the best and why.
    o Partners call out "Something, Nothing, Anything."
    o Partner one says "Chipotle!"
    o Partner two says "Harry Potter!"
    o Then the two partners debate on why "Chipotle is better than Harry Potter" and vice versa!

　Facilitator should allow participants to go through 2 rounds of the game and then pose the following questions (questions may be rhetorical, depending on time):
- What was it like to be put into conflict like this? (where there is an ultimatum; only one can win).

- How did the two of you approach the situation differently?
- If both needs could have been met—if you could have had 2 winners—would that have eliminated the conflict?

Start Time:	3:45 pm	End Time:	3:55 pm	Duration:	10 minutes

Discussion of Fears
Participant Workbook pg. 49

Facilitator should open with the following reasons why conflict is uncomfortable to deal with:
- Conflict brings out stress because our needs are unmet.
- Stress creates discomfort and (sometimes) socially unacceptable behavior.
- We recognize that our behavior may be unacceptable, but often we do it anyway or feel as if we can't help it.
- Conflict and stress each play on our fears.

Facilitator should ask participants to take a minute or two to talk to the people next to them about what is so uncomfortable for them about conflict. What don't they like about it? How do they think people view them when they're stressed or angry?

After giving them the chance to warm up, ask each group to name the fear they experience in conflict.
- Ask the entire quadrant to blurt out their fear on the count of 3.
- Repeat for all 4 quadrants.

Facilitator should ask participants if they heard others name their same fear. The point of this exercise is to show that almost all of us have reservations about conflict, and (often) people share similar fears based on their own knowledge of their stress behavior. Briefly review the fears:

A person with a BLUE personality is concerned about the possibility of making the wrong decision and letting emotions control the conversation.
- *Selecting the wrong approach*
- *Hurting feelings*
- *Volatile reaction from others*
- *Getting emotional*

A person with a GREEN personality is concerned about the possibility of a tarnishing of one's positive self-image
- *Seen in a negative way*
- *Not being a team player*
- *Not relevant*
- *Being combative*

A person with a RED personality is concerned about the possibility of the destructive damage that may occur.
- *Causing collateral damage*
- *Hastiness in timing*

- *Insensitivity toward others*
- *Not controlling anger*

A person with a YELLOW personality is concerned about the possibility of unexpected confrontational argument
- *The unknown & unexpected*
- *Dealing with emotional arguments*
- *Untrustworthiness in others*
- *Confrontations*

Start Time:	3:55 pm	End Time:	4:05 pm	Duration:	10 minutes

What is Conflict Like for Others?
Facilitator should explain that part of overcoming conflict for ourselves is understanding how others view it differently. To help participants do this, give them the following instructions:
1. Take the next 5 min. to learn what conflict looks and feels like for someone who views the world differently than you do.
2. Use the questions on the screen (read them out loud for the group) to start a conversation.
   a. What don't you like about conflict?
   b. How do you think other people view you when you're in a conflict?
3. Look across the quadrant, and find someone with an opposite Needs color to have this conversation:
   a. Blue with Red; Green with Yellow

Start Time:	4:05 pm	End Time:	4:15 pm	Duration:	10 minutes

Overcoming Fear of Conflict
Participant Workbook pg. 49

Now that participants have a good understanding of their own self-awareness about conflict, as well as how others view conflict, review best practices for overcoming those fears and managing individual behavior during conflict. Facilitator should ask participants to take a seat (it doesn't have to be their original seat—just have them sit down to move on to the next section).

Compare conflict to a game of tug-o-war where your aim is to keep the flag on the rope in the center. There's a give and take that needs to happen. You need to remain flexible and adaptive while moving through the conversation.

Next, ask them to take a few minutes to locate their Handling Conflict report from Birkman, and read through it. Use the following questions to begin a conversation about adjusting your style to manage conflict:
● What is a statement that you really connect with in your report?
● What is a statement that you think will be helpful to you as you manage conflict?
● How might you have to adjust your behavior to effectively manage conflict?

After taking some comments from the audience, expand upon the point that there are things that each of us can do to help manage conflict. Discuss what each personality type (Birkman color group) can do to overcome their fear of conflict:

Blue Personalities should:
- Address the emotional issue by having productive venting discussions with trusted confidants.
- Move forward in a pragmatic, problem solving mindset.

Green Personalities should:
- Set team agenda instead of personal agenda as top priority.
- Keep a competitive spirit focused on the tasks instead of the people.

Red Personalities should:
- Refocus energy from immediate action to thoughtful consideration of consequences.
- Consider the emotional well-being of others.

Yellow Personalities should:
- Proactively interact with others to gather information.

Use information to think big picture and be familiar/comfortable with new setting

Start Time:	4:15 pm	End Time:	4:20 pm	Duration:	5 minutes

Conclusion

Difficult conversations are, well, difficult.

We need to try and approach them in a manner that considers the **Needs** of the individual to help limit their **Stress**. You also need to be cognizant of the person's Stress behaviors so that as they start to show, you can adjust course, relate better, and help to alleviate their stress. Both of those factors are influenced by your Usual and Stress behaviors because you could be in either one during the conversation.

During Presidents' Academy we conveniently know each other's Birkman colors to help us to identify personality types, as well as their Usual behavior, Stress behaviors, and Needs. Outside of Presidents' Academy, remember that by taking the time to ask the right questions and through attentive observation to get to know the people you interact with will help you determine each person's needs and therefore limit stress.

During the next session, we'll explore this in more detail and move from the theoretical to the hands-on.

Navigating Difficult Conversations

Setting: Small Group
Duration: 60 minutes
Start Time: 4:30 pm
End Time: 5:30 pm

Overview

This session will give participants the chance to rehearse having difficult conversations using practical steps and templates to guide the conversation. Although the focus of this session is on practicing specific conversational skills, adjusting to personality types can be brought in through questioning and discussion throughout or at the end of the session.

See the following resources for more information:

> "7 Steps in Making a Difficult Employee Conversation Easy"
> Anne Grady Group
> annegradygroup.com

Objectives

- The purpose of this session is to give the participants a chance to discuss and then practice having difficult conversations
- Demonstrate knowledge of (Birkman) Stress Behaviors and how to acknowledge them in a conversation
- Use best practices and tactics for structuring difficult conversations

Activities and Items Needed

- Refer to pages 50-55 of the Participant Workbook

Room Setup

- Chairs in a circle

AV/Tech Needs

- None

Content

Start Time:	4:30 pm	End Time:	4:40 pm	Duration:	10 minutes

Introduction & Opening Discussion

Facilitator should open by explaining that, in the last session, we discussed some of the concepts behind the relationships and behaviors/reactions that go into difficult conversations. Now it's time to move into the actual process and discuss some practical approaches.

Before practicing, it's important for facilitators to give students the chance to set a baseline and think about the types of conversations they find difficult. Consider this a primer for the conversations you want them to practice. Use the following questions to prompt their thinking:
- What types of difficult conversations do you have to have?
- What conversations do you avoid?
    o What about these conversations makes you avoid them?
- What difficult conversations have you had in the past?
    o How did they go?
    o What was the result?
    o How do you think personality types might have played into it?
- What are you hoping to learn or practice today to make these conversations easier?

Start Time:	4:40 pm	End Time:	4:55 pm	Duration:	15 minutes

Explain the Process
Participant Workbook pg. 50

Facilitator should transition into explaining a general format participants can follow when preparing for and having a difficult conversation with someone. The format generally includes stating the problem, soliciting their side of the story, coming to an understanding, and finding a joint solution. Facilitator should stress that difficult conversations should allow room for both voices to be heard, and the steps you're about to go over help to ensure that's the case.

Use the following steps to describe how to move through a difficult conversation. Note that students may find it difficult to remember eight different steps, so the facilitator may need to help them generalize, combine steps, get the main idea, etc.

1. Prepare for the conversation
    o Includes considering what you know about this person's stress behavior, the situation, potential outcomes, and desirable solutions.
2. Define the problem as you see it
    o Use "I" statements to make it clear that this is your perspective, and describe effects on other stakeholders.
3. Describe the perception or impact
    o Again, use "I" statements or speak to unexpected results.
4. "Tell me more"
    o Ask for the other person's side of the story, their perception, opinion, etc. Give them room to speak and be heard. Actively listen to what they have to say, looking for places where you can empathize and make human connections.

5. Agree on the problem
   o Find common ground on what the problem actually is. It's important to agree on the problem because if the other person doesn't agree with what you believe the problem to be, it will be difficult to gain true commitment in a solution.
6. Brainstorm solutions
   o Work together to find a solution that works for both parties. Ask the other person what solution they think would be best.
7. Agree on a solution
   o In the same way you agreed to the problem, agree on the solution. Gaining solid agreement will help with commitment and follow-through.
8. Follow-through
   o Check in on how the solution is working and arrange for further discussion, if needed.

After describing the basic format for facilitating a difficult conversation, the facilitator should share some effective ways of opening the conversation. (Participants may follow along in their Participant Workbook.) Starting the conversation can sometimes be the toughest part of all, and these phrases can help set the tone:

● I have something I'd like to discuss with you that I think will help us work together more effectively.
● I'd like to talk about _____ with you, but first I'd like to get your point of view.
● I need your help with what just happened. Do you have a few minutes to talk?
● I need your help with something. Can we talk about it?
● I think we have different perceptions about _____. I'd like to hear your thinking on this.
● I'd like to talk about _____. I think we may have different ideas about how to _____.
● I'd like to see if we might reach a better understanding about _____. I really want to hear your feelings about this and share my perspective as well.

Start Time:	4:55 pm	End Time:	5:05 pm	Duration:	10 minutes

Fishbowl Conversations
After students have set the groundwork for the types of conversations they want to practice and what specific tactics they can use, the facilitator should transition into a Fishbowl Conversation activity, which will serve as an example for students before they practice on their own. The purpose of this Fishbowl is for participants to see the steps of a difficult conversation being used, and how it works.

To set up the Fishbowl, the facilitator should follow the steps below:
● Facilitator should ask the group to form a circle (if they haven't already) and place two chairs in the middle of the circle.
● The facilitator will sit in one chair and ask for a brave volunteer to have an example conversation with them. That volunteer should sit in the second chair.
● The facilitator should then select a topic that is relevant to the group to use as an example. (Consider if there are any struggles the group might benefit from confronting, like arriving on time, participation from all group members, etc.)
   o Explain to the group that the topic selected is not meant to single-out any specific person, rather to keep the examples as relevant and realistic as possible.

- Announce the topic, and begin a sample conversation following the steps you previously explained.
    - The closer to reality the example, the less participants will have to act or make-up reactions. If the example selected doesn't apply to the student who volunteered, ask them to go along with it for the sake of example.

After the conversation is completed (about 5 min.), ask participants to identify tactics used and how they worked. Use the following questions to guide conversation:
- What tactics of difficult conversations did you see me using?
- What tactics worked well?
- What tactics could have been used better?
- How do you think personality traits/stressors would have affected the conversation?

Start Time:	5:05 pm	End Time:	5:15 pm	Duration:	10 minutes

Individual Practice
Participant Workbook pg. 51

After the Fishbowl example, give participants 10 min. to practice in pairs. Instruct them to choose conversation topics that apply to difficult conversations they may need to have. They should use the following guidelines for their conversations:
- Select a topic that relates to a real conversation you may need to have.
- Explain the situation to your conversation partner, and ask them to assume the role of the other person in your situation.
- Practice having the conversation following the eight steps.
- Debrief with one another about how the conversation went.
    - What did you do well?
    - What could have been improved?
- Switch roles, and repeat the process.

If participants are struggling to come up with conversation topics, the facilitator might suggest the following topics listed on pg. 51 of the Participant Workbook:
- The member is behind on their dues.
- The member doesn't show up for community service events.
- The member has been skipping class because they're hungover.
- The member was disruptive in last night's chapter meeting.
- The member hazed a pledge.
- The Chapter Advisor is giving outdated advice.
- The Chapter Advisor is micromanaging the chapter's actions.
- The Chapter's Vice President-Pledge Education is ignoring Deltasig policies.
- The Chapter President talks to you about skipping a LEAD event the chapter paid for you to attend and which you were going to be the chapter's sole attendee.
- A Deltasig Board or Staff member calls to discuss a recent risk management violation.
- An alumnus stops by to discuss poor recruitment results.

- The Fraternity/Sorority Life Advisor calls you in to discuss inappropriate behavior at a homecoming tailgate.

Start Time:	5:15 pm	End Time:	5:25 pm	Duration:	10 minutes

Final Fishbowl

After participants have practiced in pairs, re-form the circle with two chairs in the middle. To round out the session, ask for two more volunteers to showcase how they work through difficult conversations. Ask participants who thought they did particularly well in their individual practice, or who would like further practice and feedback. Ask the volunteers to perform a final Fishbowl conversation.

Start Time:	5:25 pm	End Time:	5:30 pm	Duration:	5 minutes

Debrief

After participants have completed their Final Fishbowl, debrief with the whole group. Ask the group to provide feedback for the volunteer pair. (Be sure to congratulate them, and thank them for being an example for the group.) Then, use some of the following questions to help them process the session:

- How did your individual conversations go?
- What was it like to use specific tactics to guide your conversation?
- Think back to what we know about people's different personalities (Birkman colors). How might those differences change your conversations?
- How will you have to adjust your approach to work with different personalities?
- What business situations might you find yourself in that would require a difficult conversation?
- How might being in a business situation change the conversation?
- How might the conversation change if the other person is truly in stress mode?

Feel free to use the following thoughts to close the session:
No two difficult conversations are going to be exactly the same. Even if the topic is the same, the variations in personalities will necessitate differences.

Consider both your personality as well as the other person's before initiating the conversation. The way you approach them, your tone, and the words you choose may be different.

Etiquette Dining Program

Setting: Dinner
Duration: 80 minutes
Start Time: 5:45 pm
End Time: 7:05 pm

Overview

This session will cover meal etiquette at casual, informal, and traditional meals, as well as other basic aspects of social graces that are necessary for conducting business.

Objectives

- Understand the purpose and importance of manners
- Learn dining etiquette
- Refine social graces for business settings

Activities and Items Needed

- A menu that includes:
  - At least two types of glassware
  - Silverware for two to three courses
    - Soup/salad
    - Entrée
    - Dessert
  - White AND black napkins, if available

Room Setup

- Rounds for Dinner Service

AV/Tech Needs

- Computer with wireless presentation remote
- Projector and screen
- Microphone for the lead facilitator

Content

Start Time:	5:45 pm	End Time:	5:50 pm	Duration:	5 minutes

Introduction

Facilitator will welcome participants to dinner and invite them to be seated.

Review the main topics for the evening:
- Why bother learning table etiquette?
- Table Etiquette 101
- Adjusting to Others' Expectations
- The Bottom Line/ Dismissal

Use the quiz slide to take an informal poll about what participants already know about etiquette and manners.
1. In which order should you use your silverware?
2. Which bread plate is yours?
3. When should you begin eating?
4. Where do you put your phone during a meal?
5. What is the purpose of table etiquette?

Finish introducing the topic by explaining why table etiquette matters and the purpose of proper etiquette. Good examples to use include asking participants to think of a friend or acquaintance who always makes them feel like the only person in the room—that's how etiquette can help you make other people feel. Knowing proper etiquette sets you up for success for the future. In the future you may share a meal with a supervisor, colleague, or a client. You'll want to ensure that you understand the space you're in and feel comfortable navigating table etiquette so that you can focus on the conversations you have and the relationship you are building with the person you dine with.

Start Time:	5:50 pm	End Time:	6:00 pm	Duration:	10 minutes

The Napkin

Describe what to do with the napkin before, during, and after the meal. Explain that black and white napkins may be available to avoid noticeable lint on clothing. (If both black and white napkins are available for each participant, instruct them to put one napkin on the right leg and the other on the left leg so they can see the difference it could make to your clothing throughout the meal.)

Place Settings
Participant Workbook pg. 57-58

Ask participants how the utensil matching went—gauge the room for how much they already know. Then, introduce the main three place settings
- Casual Place Setting
- Informal Place Setting
- Traditional Formal Place Setting

Pro-tip: All of the different plates and glasses can be confusing, especially when they are crowded on a table. To select the correct plate every time, just remember the acronym BED. Mentally spell B-E-D across your place setting, and you'll know which plates and glasses are yours. B stands for Bread (on the left), E stands for Entrée (in the middle), and D stands for Drink (on the right).

If you're getting hungry, feel free to start with your bread, using the appropriate plate and knife.
- Since bread is first on the table, it might be one of the first impressions your business associates have of you, so keep in mind that:
- Breaking bread is preferable to cutting it with a knife, where it ends up smashed on your plate. Simply break a small piece, butter it individually, and eat.
- Keep a pat of butter on your plate so it's easier to butter each piece.
- If someone uses your bread plate, simply use the edge of your salad or entrée plate.

Remind participants that, when in doubt, remember Jack Dawson and work from the outside in.

Start Time:	6:00 pm	End Time:	6:15 pm	Duration:	15 minutes

SERVE THE SALAD AT 5:55-6:00 PM
Facilitator will invite the wait staff to serve the first course (most likely salad). Remind participants of the following etiquette rules:
- Soups and salads usually get their own plate or bowl, unless at a casual party where the same plate may be used for all courses.
- The smallest, outermost fork is the salad fork.
- Salads can often be difficult to eat gracefully due to unruly lettuce and drippy dressing—it is perfectly acceptable to cut your salad if a bite is too big. Try to avoid cutting your entire salad at the onset; this may result in you looking like you are preparing a child's meal, rather than adjusting your bites.
- When passing dressing (or any item) pass to the right. If everyone follows this rule, it will ensure that passing food goes smoothly and there are no traffic jams (think passing food at holiday gatherings and how messy it can be).

Instruct participants to please enjoy their first course, and that you'll return to guide them through etiquette during the main course.

Start Time:	6:15 pm	End Time:	6:40 pm	Duration:	25 min.

CLEAR SALADS/SERVE MAIN COURSE AT 6:15
Facilitator should explain that after the salads are cleared, the main course is served. Remember the following about enjoying the main course:
- When first courses are cleared, it should be easier to tell which silverware to use, since the only ones left are the ones you need for the upcoming courses.
- If you need different utensils for your meal, it will usually be brought to you prior to your meal being served. (Think steak knife, entrée soup spoon, shellfish utensils, etc.)
- It is generally a sign of respect to wait for all at your table to be served before starting your meal.

Note that if members of your party request that you begin without them, it is acceptable to begin your meal at their request.

While participants are eating, facilitator will cover a few additional etiquette rules related to business meals:
- Respect the host by waiting to be seated and waiting to eat until they have sat and begun eating.
- Pass like things together (think salt and pepper, even if only one is asked for).
- Utensils should not touch the table after you've begun eating. If you're finished, place them across your plate.

Final Faux Pas
Review the following final faux pas quickly, speaking fast. Clarify that hopefully participants don't need to be told this…but…absolutely no:
- Chewing with your mouth open
- Talking with food in your mouth
- Cramming your mouth with food
- Arms or elbows on the table while eating
- Making sounds after each sip or bite
- Reaching across the table
- Eating off someone else's plate
- Licking your fingers
- Wearing a ball cap inside

Five Easy Rules for Formal Dining
When in doubt, remember these five, easy rules:
Let's break it down with some easy-to-remember rules.
1. Like with working from the outside in with utensils, you work from the top down with food. For example, if soup is first, it will be the top bowl in front of you and things will be cleared working downward.
2. The bread plate is always to the left and the drink to the right …. So, this spells BED – bread, entrée, drink.
3. Bread should be buttered one piece at a time, in small bites.   It should not be buttered all at once and it's not a sandwich.
4. Cell phones and purses should never be present at the table. Your attention should be on your dinner companions, not on what you brought with you. Place purses underneath your chair and phones safely stowed in a bag or pocket.
5. At dessert time, if you don't want coffee, simply turn the cup over on the saucer. This is an indication you don't want coffee.

Remembering these basic rules should help you navigate the table-top.

Enjoy your entree. I'll return later with guidance on dessert.

Start Time:	6:40 pm	End Time:	7:05 pm	Duration:	25 minutes

CLEAR ENTRÉE PLATES/SERVE DESSERT AT 6:40 PM

Most formal meals will end with dessert (my favorite part!). There are just a couple of things to keep in mind here, as you near the end of your business meal:

- In a catered setting (like the one here), you can get an indication of the type of dessert to be served by whether or not a fork or spoon has been placed at the top of your place setting. (Fork is for solid desserts like cake, spoon is for soft desserts like custard or ice cream.)
- If a layer cake is tall and messy, you can turn it onto its side so that it's neater to eat.
- You may be tempted to try someone else's dessert. Resist this temptation! (unless your host has ordered desserts to be shared)
- At restaurants, dessert may be considered an extra part of the meal. Defer to the host to see if dessert is anticipated or if they'd like to skip it.
- Coffee, tea, and after dinner drinks are often served during the dessert course. If you don't want these items, simply flip your coffee cup over.

Closing Remarks

Social grace can remove extra challenges in business settings. If meals go smoothly and people feel respected, you'll be able to focus on your skills and the work at hand.

After all of that, who knows every answer to our quiz? (Review quiz from the opening.)

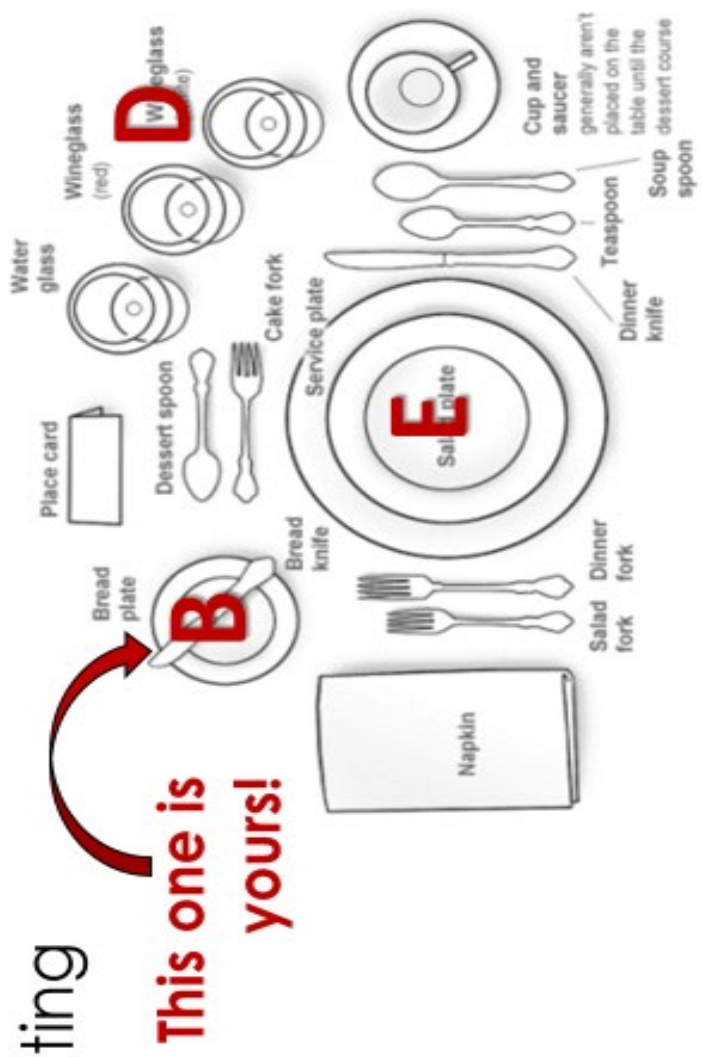Thank participants for their attention, and allow them to finish dessert at their leisure.

Presentation Notes for Reference:

Five Easy Rules for Formal Dining

1. Use silverware from the outside in; Food dishes are top-down.
2. Follow the "BED" rule to identify your plates.
3. Butter bread in small, individual bites.
4. Phones and personal items belong under your chair.
5. Flip your coffee cup to indicate you don't want coffee.

Table Manners

The Formal Place Setting

This one is yours!

Place card

Dessert spoon

Cake fork

Service plate

Bread plate

Bread knife

B

Water glass

Wineglass (red)

Wineglass (white) **D**

E Salad plate

Salad fork

Dinner fork

Napkin

Dinner knife

Teaspoon

Soup spoon

Cup and saucer generally aren't placed on the table until the dessert course

plaid
being. better.

Leading Like a Facilitator

Setting: Large Group
Duration: 45 minutes
Start Time: 7:15 pm
End Time: 8:00 pm

Overview

Facilitation is the process of designing and running a successful meeting in business, organizational development, and consensus decision-making. It is any activity that makes an action or a process easy or easier. In this session, you will learn how to approach leadership more from the mindset of a facilitator and less as a top-down, formal leader. These skills will aid in both leading your chapter, a project team in school, and business units.

Objectives

- Define Facilitation and its behavioral anchors
- Practice facilitating in small groups

Activities and Items Needed

- Facilitation prompts for participants to practice

Room Setup

- Theater style

AV/Tech Needs

- Computer with wireless presentation remote
- Projector and screen
- Lavalier microphone for the lead facilitator
- 2 wireless microphones for use in the crowd

Content

Start Time:	7:15 pm	End Time:	7:20 pm	Duration:	5 minutes

Introduction
Participant Workbook pg. 60-61

Now that we have made the difficult conversations more comfortable, we still need to problem solve an issue due to conflicting viewpoints. Facilitating is a crucial skill set in navigating difficult conversations for authentic, collective commitment. Only then, can accountability be achieved.

BUY-IN IS THE KEY

Facilitating means:
- Understanding the goals of the meeting and the organization
- Keeping the group on the agenda and moving forward
- Involving everyone in the meeting, including drawing out the quiet participants and controlling the domineering ones
- Making sure that decisions are made democratically
- **Clears the filter (Org Culture) so that decisions consider the right factors. Remember that the organization's lodestars should be your guide for decision making.**

Start Time:	7:20 pm	End Time:	7:35 pm	Duration:	15 minutes

Basic Facilitation Skills
Participant Workbook pg. 60-61

Facilitator will review the basic skills needed as a facilitator in preparation for participants to practice on their own.

Focus on the idea that a facilitator is a neutral conductor of OTHERS' ideas, not their own.
Competencies of a good facilitator include:
- Is a *guide to help people navigate through a process together*, not the center of wisdom and knowledge. That means a facilitator isn't there to give opinions, but to draw out opinions and ideas of the group members.
- Focuses on **how** people participate in the process of learning or planning, **not just on what** gets achieved.
- *Allows the group to wrestle with a decision.*
  - The less you say, the more impactful it is.
  - But, as a chapter officer your experience and opinion may be helpful in discussions.
- *Doesn't feel that they have all of the answers or should talk all the time.* The most important thing is what the participants in the meeting have to say. Focuses on how the meeting is structured and run to make sure that everyone can participate.

This includes things like:
- Making sure everyone feels comfortable participating. Empowering members to share their opinions. Being aware of strong voices and intentionally calling on the quieter voices in the space to ensure equitable opportunities for thought sharing.
- Developing a structure that allows for everyone's ideas to be heard.

- Making members feel good about their contribution to the meeting. Being supportive of everyone's ideas and not criticizing anyone for what they've said.
- Making sure the group feels that the ideas and decisions are theirs, not just the leader's.

There are a few things you can practice to become better at facilitation. These best practices are:
- Don't memorize a script
  - Though having a well-prepared agenda and key points is helpful, you need to be flexible and natural. If people sense that you are reading memorized lines, they will feel like they are being talked down to and won't respond freely. View the program as a three-part play and guide the audience through the interactive story.
- Watch the group's body language
  - Are people shifting in their seats? Are they bored? Tired? Looking confused? If folks seem restless or in a haze, you may need to take a break, or speed up or slow down the pace of the meeting. And if you see confused looks on too many faces, you may need to stop and check in with the group, to make sure that everyone knows where you are in the agenda and that the group is with you.
- Always check back with the group
  - Be careful about deciding where the meeting should go. Check back after each major part of the process to see if there are questions and that everyone understands and agrees with decisions that were made.
- Summarize and pause (be comfortable with silence)
  - When you finish a point or a part of the meeting process, sum up what was done and decided, and pause for questions and comments before moving on. Learn to "feel out" how long to pause -- too short, and people don't really have time to ask questions; too long, and folks will start to get uncomfortable from the silence.
- Be aware of your own behavior
  - Take a break to calm down if you feel nervous or are losing control. Watch that you're not repeating yourself, saying "ah" between each word, or speaking too fast. Watch your voice and physical manner. (Are you standing too close to folks so they feel intimidated, making eye contact so people feel engaged?) How you act makes an impact on how participants feel.
- Occupy your hands-watch out for fidgeting
  - Hold onto a marker, chalk, or the back of a chair. Don't play with the change in your pocket!
- Use your body language to convey a message
  - Using body language to control the dynamics in the room can be a great tool. Moving up close to a shy, quiet participant and asking them to speak may make them feel more willing because they can look at you instead of the big group and feel less intimidated. Strike a balance between intentional movement (NOT pacing) and standing still.
Helpful Phrases:
- "What are your thoughts on this topic?"
- "What needs to be said that hasn't been discussed, yet?"
- "How are we all feeling about this?"

- "What I hear you saying is…"
- "It seems like…"
- "Help me understand…"
- "I think I understand what you're saying."

Start Time:	7:35 pm	End Time:	7:55 pm	Duration:	20 minutes

Group Facilitation Practice
Participant Workbook pg. 61

Next, the facilitator should explain how participants will go about practicing their facilitation skills.
- In their small groups (with whom they should already be sitting), participants will complete three rounds of practice facilitation.
- Whomever is acting as the facilitator (could be either one or two people co-facilitating) will come to the front of the room and select a prompt.
- They will read that prompt and take it back to their group to begin the short, ten-minute meeting.

After seven minutes, the main session facilitator will announce that it's time to switch, and the second participant-facilitator will come to the front of the room to receive a different prompt. After another ten minutes, a third participant-facilitator will do the same thing.

Prompt #1: You (as the small group facilitator) are responsible for overseeing the collaboration between group members to create a small group reunion after Presidents' Academy. Lead your group through the brainstorming and big-picture planning of what that reunion should look like. Remember that a successful facilitator:
- Encourages all voices to be heard
- Reminds the group of logistical, budgetary, or realistic constraints, when necessary
- Manages the emotions, ideas, and viewpoints of all group members

Prompt #2: You (as the small group facilitator) must guide your group in determining which ONE piece of information from Presidents' Academy is the most important to take back to your chapters. Facilitate the discussion on how your small group members should present and implement that information with their individual chapters. Remember that a successful facilitator:
- Ensures that all voices are heard
- Keeps the ultimate goal in mind
- Guides conversation toward the successful completion of the goal

Prompt #3: You (as the small group facilitator) must lead the group in a discussion about what you could do to be a more engaged, productive, and effective small group. Determine three things your group can work on for the rest of Presidents' Academy to achieve that goal. Remember that a successful facilitator:
- Creates a space in which all voices are respected and valued
- Encourages collaboration between members
- Gives ownership to group members, rather than keeping it for themselves

Start Time:	7:55 pm	End Time:	8:00 pm	Duration:	5 minutes

Conclusion

Bring conversations to an end, and let participants know that they will be able to debrief their practice rounds in the next small group session. Wrap up by summarizing:

Facilitation is not leading the conversation from the front nor is it backseat driving from the rear. Rather it is a casual conversation alongside a friend with a balance between listening and asking questions to come to a conclusion at the same time.

Facilitating is a crucial skill set in navigating difficult conversations for authentic, collective commitment. Only then, can accountability be achieved.

Leading Like a Facilitator

Setting: Small Group
Duration: 60 minutes
Start Time: 8:10 pm
End Time: 9:10 pm

Overview

Facilitation is an important part of leading a chapter, an organization, or a business. Now that students have learned, seen, and practiced the basic skills of facilitating, they'll review more advanced aspects of facilitation and meeting leadership.

Objectives

- Learn meeting- and agenda-specific facilitation techniques
- Practice creating meeting agendas that include facilitation best practices

Activities and Items Needed

- Accompanying worksheet

Room Setup

- Chairs in a circle

AV/Tech Needs

- None

Content

Start Time:	8:10 pm	End Time:	8:20 pm	Duration:	10 minutes

Introduction

Facilitator should open the session by explaining that although there are some very basic fundamentals of facilitation (which you just learned in the large group session), there are also some more advanced tactics that can be built into your leadership practices.

Before moving on to the advanced tactics, be sure everyone has a good understanding of facilitation fundamentals. Take 5 min., if needed, to debrief on the previous session. Use some of the questions below to start the conversation:
- What new information did you learn about facilitation?
- What was it like to practice facilitating a topic?
- What was the most difficult thing?
- What other questions do you have about facilitation before we move on?

Start Time:	8:20 pm	End Time:	8:50 pm	Duration:	30 minutes

Facilitated Meetings
Participant Workbook pg. 62

When students feel ready to move on, begin an open discussion about the tactics used in a facilitated meeting. Some students may be familiar with these tactics, and others may not have used them. Some may recognize the tactics and assume they understand, but actually USING and PRACTICING the tactics can be different than just cognitive understanding. As a facilitator, you'll want to check that they understand what to say and how to realistically use each tactic. Use the following questions to prompt thinking and test for understanding:

- When have you used this tactic?
- How might you use this tactic with your chapter?
- How would you phrase that? / What would that sound like?
- How have you seen this tactic used in the past?

Describe the tactics below, use examples from your own experience, and ask participants to provide their own examples of how they could be used in a meeting.

1. Review the Agenda, Objectives and Ground Rules for the Meeting
   a. Go over what's going to happen at the meeting. Check with the group to make sure they agree with and like the agenda. You never know if someone will want to comment and suggest something a little different. This builds a sense of **ownership** of the meeting and lets people know early on that you're there to facilitate *their* process and *their* meeting, not your own agenda.
   b. The same is true for the outcomes of the meeting. You'll want to review outcomes to get input and check that these are the desired outcomes they're looking for. This is also where the ground rules are laid out.
2. Encourage Participation
   a. This is one of your main jobs as a facilitator. It's up to you to get those who need to listen and those who ought to speak to participate accordingly. Encourage people to share their experiences and ideas appropriately.
3. Stick to the Agenda
   a. Groups have a tendency to sometimes meander far from the original agenda. When you hear the discussion wandering off, bring it to the group's attention. You can say "That's an interesting issue, but perhaps we should get back to the original discussion." Use the parking lot technique.
4. Avoid Detailed Decision-Making
   a. Sometimes, it's easier for groups to discuss the color of napkins than the real issues they are facing. Help the group not to get mired in details, but rather focus on the big picture concept. Suggest instead, "Perhaps the committee could resolve the matter." Do you really want to be involved in that level of detail?
5. Seek Commitments
   a. Getting commitments for future involvement is often a meeting goal. You want leaders to commit to certain tasks, people to volunteer to help on a project, or organizations to support your group. Make sure adequate time is allocated for

seeking commitment. For small meetings, write people's names down on a flip chart next to the tasks they agreed to undertake.

b. Use meeting time to gain specific commitments—it's more efficient than saying, "I'll connect with you later."

6. <u>Bring Closure to Each Item</u>

a. Many groups may overthink and discuss things much longer than they need to unless a facilitator helps them to recognize they're basically in agreement. Summarize a consensus position or ask someone in the group to summarize the points of agreement, and then move forward.

7. <u>Respect Everyone's Rights</u>

a. The facilitator protects the shy and quiet folks in a meeting and encourages them to speak out. There is also the important job of keeping domineering people from monopolizing the meeting or ridiculing the ideas of others.

b. Sometimes, people dominate a discussion because they are really passionate about an issue and have lots of things to say. One way to channel their interest is to suggest that they consider serving on a committee or task force on that issue. Other people, however, talk to hear themselves talk. If someone like that shows up at your meeting, we shall share for some tips on dealing with "disrupters."

8. <u>Be Flexible</u>

a. Sometimes issues and discussions will arise in the meeting that are so important, they will take much more time than you thought. Sometimes, nobody will have thought of them at all. You may run over time or have to alter your agenda to discuss them. Be sure to check with the group about whether this is O.K. before going ahead with the revised agenda. If necessary, ask for a five-minute break to confer with participants on how to handle the issue and how to restructure the agenda. Be prepared to recommend an alternate agenda, dropping some items if necessary.

9. <u>Summarize the Meeting</u>

a. Before ending the meeting, summarize the key decisions that were made and what else happened. Be sure also to summarize the follow-up actions that were agreed to and need to take place. Remind folks how much good work was done and how effective the meeting hopefully was. Refer back to the objectives or outcomes to show how much you accomplished.

10. <u>Thank the Participants and Close the Meeting</u>

a. Take a minute to thank people who prepared things for the meeting, set up the room, brought refreshments, or did any work towards making the meeting happen. Thank all of the participants for their input and energy and for making the meeting a success.

b. People appreciate nothing more than a meeting that ends on time! It's usually a good idea to have some "closure" in a meeting, especially if it was long, if there were any sticky situations that caused tension, or if folks worked especially hard to come to decisions or make plans.

c. A nice way to close a meeting is to go around the room and have people say one word that describes how they are feeling now that all of this work has been done.

	You'll usually get answers from "exhausted" to "energized!" If it's been a good meeting, even the "exhausted" ones will stick around before leaving.				

Start Time:	8:50 pm	End Time:	9:00 pm	Duration:	10 minutes

Agenda Creation
Participant Workbook pg. 63

After discussing specific tactics that students can use in a facilitation, prompt them to start developing an actual meeting agenda that they can use with their chapters. This agenda should have the discussed facilitation tactics built into it to increase the meeting's effectiveness and team participation. Encourage students to think about actual meetings they will have to have this semester, including their goal-setting meeting. Give students about 10 minutes of individual work time to complete the workbook activity.

Start Time:	9:00 pm	End Time:	9:10 pm	Duration:	10 minutes

Agenda Share, Comment, & Debrief
When participants are finished with their agendas, invite them to share the format they came up with and how they plan to use the facilitation techniques. Take this time (about 5 minutes) to ask and answer questions, provide feedback, and workshop their agendas.

Then, take the last 5 min. to debrief with the large group about how facilitation went. Use some or all of the following questions:
- What is it like to have a specific agenda spelled out before your meeting?
  - How often do you go through this process before leading a meeting? Was this new for you?
- What will be the challenges of facilitating for your chapter?
- What is it like to view facilitation as a skill that can be practiced and planned?
- How might you need to adapt your facilitation techniques to accommodate the multiple personality types you will be leading?

To close the session, remind them that:
- The following session is an independent and group work session on strategic goals for their chapter (their homework)
- Breakfast is at 8 am – continue your operational topic discussions
- They will start in their small groups
- Check out of your room in the morning and bring your luggage down here

Saturday Facilitator Huddle

Duration: 30 minutes
Start Time: 9:15 pm
End Time: 9:45 pm

Record your questions and notes here.

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Bringing it Back to Your Chapter & Evaluation

Setting: Small Group
Duration: 60 minutes
Start Time: 9:00 am
End Time: 10:00 am

Overview

During this session, participants will share and discuss their leadership plan, ask/discuss final questions and topics, and complete an evaluation.

Objectives

- Develop an individual leadership action plan
- Cover any final lingering questions or topics
- Complete and submit final program evaluations

Activities and Items Needed

- Flip chart for Parking Lot items
- Participants will need their completed workbook

Room Setup

- Chairs in a circle

AV/Tech Needs

- None

Content

Start Time:	9:00 am	End Time:	9:05 am	Duration:	5 minutes

Introduction
Participant Workbook pg. 65-67

Begin the session by opening up a discussion about what they feel their chapter needs most from them as a leader. Consider the following questions to pose to participants:
- On what will you focus your leadership efforts once you return to your chapter?
- What challenges do you think you'll face?
- How has this weekend helped prepare you to lead?

In our last small group session, we are going to instead focus on what you as Chapter President and leader of your chapter needs to do.

In this session, participants will:
- Develop a Leadership Action Plan
- Share with peers for feedback

● Assign accountability buddies					

Start Time:	9:05 am	End Time:	9:15 am	Duration:	10 minutes

Personal Reflection and Develop Action Plan

Using the template provided in your workbook on page 65, take some personal reflection time to develop your Leadership Action Plan. Consider the following as you reflect:

- What are the first steps you need to take when you return to campus after Presidents' Academy?
- How will you get to know your team better in order to leverage their strengths?
- What difficult conversations do you need to have?
- Do you need to adjust your facilitation style? If so, how?
- What do you need to do to develop and/or implement a strategic plan?
- What support will you need? From who?

Start Time:	9:15 am	End Time:	9:30 am	Duration:	15 minutes

Partner Share and Feedback

After some quiet time to draft their personal action plan, have participants pair up (or in groups of three) and share their plans. Explain that the partner(s) that they select for this pair and share activity will serve as their Peer Coach(es) following Presidents' Academy to provide support and hold their partners accountable. Peer Coaches should listen and offer feedback to help strengthen their partners' action plan.

When you are serving in the Peer Coach capacity be an active listener and pose questions such as the following to your partner:

- What is the outcome, impact, or change you want to bring about? What would total success look like? Short of total success, what is the most important result you desire?

- How clear are the action steps? Do they follow the SMARTIE format? How well do they set you up to bring about the desired outcomes?

- What context, information, or resources might you need before taking action? Where or with whom does that information reside? What is your plan to get that information?

- What barriers or challenges do you anticipate? How will you minimize or overcome them?

- Might you benefit from practicing or rehearsing a planned interaction, perhaps with someone who can provide feedback? What will you do to create that opportunity?

- How can the Chapter Advisor, District Director, Assistant District Director, Regional Vice President, or Central Office staff support you?

- What can I as your Peer Coach offer to assist you? [This is a great opportunity for each officer to practice assessing their strengths and the needs of their partners based on personality types.]

Ask the pairs to exchange contact information with their partner and schedule a Peer Coaching call a few weeks out to follow up with each other on progress and offer support. You are encouraged to follow up with your accountability buddy monthly.

If time allows, the facilitator may ask them to share one or two action plan items with the full group, but the essence of this is establishing a Peer Coach for the remainder of the semester.

Wrap Up on Action Plan

Thank you for sharing some items from your action plan. As was noted as an example on your Action Plan Template, one of the first action steps you take would be to share your action plans with your executive committee, Chapter Advisor, District Director, Assistant District Director, and Regional Vice President. Utilize these folks as a resource and as a means of accountability for yourself and your chapter. All of these folks want to see and help you succeed.

Start Time:	9:30 am	End Time:	9:35 am	Duration:	5 minutes

Parking Lot Items
After wrapping up the session's education portion, move on to any parking lot items that might still be on people's minds. What is still outstanding that they'd like to cover? What still needs to be returned to? If any parking lot items are individualized vs a group item, those individuals can be connected with other leaders, staff, appropriate resources.

Start Time:	9:35 am	End Time:	9:40 am	Duration:	10 minutes

Weekend Debrief
Facilitator should review the weekend with their small group and get some informal feedback on how participants think it went. Use the questions below:
- What are some of your key takeaways and commitments from this weekend?
- Which session(s) was (were) most useful to you?
- Which session(s) was (were) least effective or least helpful for you?
- What was your favorite part of the weekend?
- What would you have liked to see more of?
- Would you recommend Presidents' Academy to others?

Start Time:	9:45 am	End Time:	9:55 am	Duration:	5 minutes

Survey Completion- This is a PRIORITY item to be done during this small group session!
Participant Workbook pg. 70

Ask all to go to the online survey and fill out. Explain they will be asked again after the program to do a survey to review the remainder of the day too. They may use any notes they took on page 71 of the Participant Workbook to help them complete the digital survey. (Nothing will be done with the Program Evaluation in the workbook; it is simply for their notes and reference.)

Start Time:	9:55 am	End Time:	10:00 am	Duration:	10 minutes

Final Thoughts
This is the opportunity for Small Group Facilitators to say goodbye.

Remind them that contact information for everyone at the program will be made available to them very soon, so they don't need to spend time passing around sign-up sheets to gather that info.

Students may want to say goodbye to one another, take photos, etc.

Inspirational Leadership

Setting: Large Group
Duration: 60 minutes
Start Time: 10:15 am
End Time: 11:15 am

Overview

This is the capstone of the program. This presentation and the guest speaker must tie everything together and inspire the participants to go forth and conquer the world.

Objectives

- Provide a conclusion to the program
- Inspire the participants

Activities and Items Needed

- None

Room Setup

- Theater style

AV/Tech Needs

- Computer with wireless presentation remote
- Projector and screen
- Lavalier microphone for the lead facilitator
- 2 wireless microphones for use in the crowd

Content

Start Time:	10:15 am	End Time:	10:20 am	Duration:	5 minutes
Introduction Introduction of _____ by Cory Stopka.					

Start Time:	10:20 am	End Time:	11:00 am	Duration:	40 minutes
The Leadership "IT" Factor Apple – Jobs departure, company struggles, and Jobs returns Facebook – focus on profits pulled them from their mission to build a community Uber Wells Fargo – fake accounts Disciples vs. Customers					

Don't forget the mission in search of pure profit.

You must inspire.

Q&A time with keynote speaker facilitated by Stopka or another designee.

Start Time:	11:00 am	End Time:	11:15 am	Duration:	15 minutes
Closing Remarks, Q&A and thanks by Cory Stopka.					

Graduation/Moving Forward

Setting: Large Group
Duration: 45 minutes
Start Time: 11:15 am
End Time: 12:00 pm

Overview

Formally end the program – Cory Stopka and Jeremy Levine

Objectives

- Closing Remarks
- Handout graduation certificates
- Handout thank you certificates
- Travel details and final thanks

Activities and Items Needed

- Need Graduation Certificates for all members
- Need Thank You Certificates for Small Group Facilitators

Room Setup

- Theater style

AV/Tech Needs

- Computer with wireless presentation remote
- Projector and screen
- Lavalier microphone for the lead facilitator
- 2 wireless microphones for use in the crowd

Content

Start Time:	11:15 am	End Time:	11:20 am	Duration:	5 minutes
Introduction Follow-up/next steps by Plaid. What to do with all this new information and relationships? Key points: • Utilize the Leadership Action Plan you created during your small group session this morning • Take it one day, one task, and one goal at a time • Leverage your team by utilizing their strengths • Take time to reflect on the skills you learned during Presidents Academy and how you might practice these skills during your officer term, your remaining time as an undergraduate student, and into your future career.					

Thank them for a great weekend!					
Start Time:	**11:20 am**	**End Time:**	**11:45 am**	**Duration:**	**25 minutes**

Conducted by Cory Stopka and Jeremy Levine.
"Please hold your applause until all members of a group have been introduced."

For each group:
- Call the small group facilitators up and present them with a certificate
- Small group facilitators will then assemble their groups to present certificates.
- Take group pictures
- Release them back to their seats

Start Time:	**11:45 am**	**End Time:**	**12:00 pm**	**Duration:**	**15 minutes**

Conclusion - Conducted by Cory Stopka and Jeremy Levine.

Mention we need them to complete the weekend's survey this afternoon or in the next couple of days – they're feedback is so important. We'll email them the link soon.

Follow-up/next steps

Final thank you.

Appendix

The company as a community. This kind of workplace exudes an all-for-one, one-for-all spirit in which trust, teamwork, and peer-to-peer loyalty are bedrock principles rather than mere rhetoric. Customers matter, of course, as do the interests of partners and investors. But this workplace elevates the needs of employees above all other constituencies. The formula for business success starts with what's right for the people in the business. For example, at Davita, a hugely successful healthcare provider based in Denver, Colorado, CEO Kent Thiry likes to say that his organization is a "community first and a company second." He explains: "We have flipped the means and the ends. Having an adequately profitable business is the means. Building a real community of human beings is the end."

A constellation of stars. These organizations are a collection of hard-driving, fiercely competitive individuals who measure their success against personal goals, and even against one another. The ethos is up-or-out, sink-or-swim, rank-and-yank. It's a tough environment, but it's the right environment for talented people who aspire to be superstars. Many investment banks and hedge funds operate this way, as do some law firms, consulting outfits, and tech titans. "Someone who is exceptional in their role is not just a little better than someone who is pretty good," Facebook CEO Mark Zuckerberg famously told the New York Times. "They are 100 times better." In workplaces built for stars, organizational success relies on individual achievement.

Not just a company, a cause. In this environment, employees worry less about personal happiness or individual triumphs and more about their collective impact. There is a self-effacing quality to these workplaces, a willingness to make sacrifices and go to extraordinary lengths to keep promises to customers and other constituencies. The spirit is "mission first" — do whatever it takes to get the job done. No company better captures this model than USAA, the fabulously successful financial services company that does business exclusively with active and retired military members and their families. USAA has become a passion brand, renowned for its out-of-this-world service, because grassroots employees identify so thoroughly with soldiers and their families, and put those interests above their own. That's what it means to be a cause, as opposed to just a company.

Small is beautiful. Certain people, whether they're motivated by a sense of mission or a thirst for individual achievement, are at their best in environments that are easy to navigate, where there are few obstacles between ideas and action, where a sense of urgency defines the pace of life. Last October entrepreneurship guru Bo Burlingham published the 10th-anniversary edition of his business classic, Small Giants: Companies That Choose to Be Great Instead of Big. The book's title and subtitle capture the spirit of this kind of workplace, where human scale matters more than massive revenue and big market share. In a world where smaller and smaller groups of people can achieve bigger and bigger things, size really does matter — and smaller can often be more rewarding than bigger.

Workplace Culture: Strong Leadership

This workplace culture revolves around leadership–both existing and rising. Mentorship programs, coaching programs, and leadership training are implemented and stressed. Existing leaders put their subordinates in positions to succeed, and the best performing employees are put on the fast track for leadership positions of their own.

You might think having a strong corporate structure is necessary when it comes to fostering a culture of strong leadership. This isn't necessarily true. A coffee shop where all incoming baristas are trained to be competent shift leaders can have a great culture of leadership.

Workplace Culture: Customer Service Excellence

Here's a workplace culture that is emphasized in a number of industries–from the service industry to software sales. The "customer is always right" attitude reigns supreme in a culture of customer service excellence. Even employees who aren't customer-facing go about their days with customer satisfaction in mind.

Products are manufactured with ease of use in mind, customer surveys are conducted regularly, and there is a ton of importance placed on customer ratings and reviews. Social media accounts are monitored constantly for customer service related issues, and the phones are always open. Amazon, whose customer satisfaction is universally praised, is an example of a company with a culture of customer service excellence.

Workplace Culture: Sales

Common earmarks of a sales culture include working product knowledge across all members of a staff, a commitment to consistently hitting quarterly sales goals and quotas, and a general focus on daily activities that will directly generate revenue for the company. Blending a sales culture and a customer-centered culture can lead to long-term success.

Companies like Oracle and Salesforce offer high commissions to incentivize sales and reinforce their sales-first cultures.

Workplace Culture: Role-Playing

In a role-playing culture, specialists are valued above all else: nothing is more important than mastery of your craft. Employees are trusted to take accountability over the projects for which they are qualified. The hiring process is highly selective in a role-based workplace culture. Hires are made based more on skills than intangibles. Wages are typically high because employees have undergone extensive training for the position prior to getting hired. They have skills that not everybody possesses, and that few, if anyone, could fake. You'll find a strong role culture among craftsmen (as subcontractors working on a large project) and on web and software development teams, where individuals have the ability to write a specific computer programming language.

Workplace Culture: Innovation

A culture of innovation is a culture in which conventional ideas fall by the wayside. It's a common staple of companies that consistently attempt to stay on the cutting edge of industry trends and developments. Strict lines of communication and structural hierarchies are often subverted for the sake of airing out ideas that break new ground. The impression is one of a giant think tank–where company space is a breeding ground for ideas.
A company like Tesla is famously innovative, but smaller examples also come to mind–a student-run sports broadcast team, for instance, that finds new and exciting ways to deliver play-by-play to fans via social media.

Workplace Culture: Empowerment

Here's a culture in which no employee feels undervalued.
Regardless of position or rank, employees are meant to feel as if their role in the business is vital for operation. Wages are often generous, and low-ranking employees feel comfortable approaching their superiors with questions and suggestions. During a conflict, steps are taken to make employees feel as if they stand on equal footing with one another. Requests for bonuses, wage increases, and position changes are seriously considered and granted when appropriate.
Ben and Jerry's continuously empowers its employees through well-paying jobs, community service, and, of course, the opportunity to name new flavors of ice cream.

Workplace Culture: Task-Oriented

A common trademark of a task-oriented culture is the use of small, collaborative teams to tackle inbound issues. Employees must have the ability to work well with one another and are interviewed by most or all members of their team to make sure they'll be a good fit if hired. Much of the day to day operation consists of getting in conference rooms and other collaborative spaces and hammering out team-specific strategies.

A marketing team game planning for a product launch might demonstrate a strong task-oriented culture as they coordinate responsibilities and attempt to meet goals over the course of a few weeks.

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