PRESIDENTS' ACADEMY

DELTA SIGMA PI

2022

Facilitator Guide

Schedule of Events

*Note: All times in Eastern Time Zone

Friday, January 14, 2022				
Start Time	**End Time**	**Duration**	**Type**	**Title**
7:00 pm	7:15 pm	15 min	Large Group	Welcome by Grand President Cory Stopka
7:15 pm	7:25 pm	10 min	Large Group	Plaid Introduction and Instructions
7:25 pm	7:30 pm	5 min		Passing Period
7:30 pm	8:00 pm	30 min	Small Group	Small Group Icebreakers
8:00 pm	8:05 pm	5 min		Passing Period
8:05 pm	8:50 pm	45 min	Large Group	Birkman Basics
8:50 pm	9:00 pm	10 min		Break/Passing Period
9:00 pm	9:45 pm	45 min	Small Group	Building Successful Teams
9:45 pm	9:50 pm	5 min		Passing Period
9:50 pm	10:20 pm	30 min	Large Group	Understanding Organizational Purpose and Principles
10:30 pm	11:30 pm	60 min		Freestyle Discussions (Optional & for Student Attendees and Designated Moderators Only) – Get to Know Other Attendees (By Birth Month)
10:30 pm	11:00 pm	30 min		Facilitator Huddle

Saturday, January 15, 2022				
Start Time	**End Time**	**Duration**	**Type**	**Title**
1:00 pm	1:10 pm	10 min	Large Group	Welcome by Past Grand President Tricia Smith
1:10 pm	1:30 pm	20 min	Large Group	Incentivizing, Motivating & Accountability
1:30 pm	1:35 pm	5 min		Passing Period

1:35 pm	2:15 pm	40 min	Small Group	Incentivizing, Motivating & Accountability
2:15 pm	2:25 pm	10 min		Break/Passing Period
2:25 pm	2:45 pm	20 min	Large Group	Navigating Difficult Conversations
2:45 pm	2:50 pm	5 min		Passing Period
2:50 pm	3:30 pm	40 min	Small Group	Navigating Difficult Conversations
3:30 pm	3:45 pm	15 min		Grab a Snack/Break
3:45 pm	4:30 pm	45 min	Large Group	Town Hall
4:30 pm	4:40 pm	10 min		Break/Passing Period
4:40 pm	6:00 pm	80 min	Small Group	Strategic Planning
6:00 pm	7:00 pm	60 min		Freestyle Discussions (Optional & for Student Attendees and Designated Moderators Only) - Chapter Operational Topics
6:00 pm	6:30 pm	30 min		Facilitator Huddle

Sunday, January 16, 2022

Start Time	End Time	Duration	Type	Title
2:00 pm	2:10 pm	10 min	Large Group	Welcome by Leadership Foundation Executive Vice President Bill Schilling
2:10 pm	2:30 pm	20 min	Large Group	Leading Like a Facilitator
2:30 pm	2:35 pm	5 min		Passing Period
2:35 pm	3:15 pm	40 min	Small Group	Leading Like a Facilitator
3:15 pm	3:30 pm	15 min	Small Group	Small Group Farewells, Parking Lot Items
3:30 pm	3:40 pm	10 min		Break/Passing Period
3:40 pm	4:25 pm	45 min	Large Group	Inspirational Leadership Keynote
4:25 pm	4:40 pm	15 min	Large Group	Closing Remarks and Next Steps
4:45 pm	5:45 pm	60 min		Freestyle Discussions (Optional & for Student Attendees and Designated Moderators Only) – Parking Lot Topics and Chapter Operations

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 his/her feet
- Showing a sense of humor with a sense of seriousness

Personal Interjection — *The facilitator will regulate his/her 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 ✗ 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.

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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

How do volunteer leaders fit into the agenda for 2022?

District Directors, Assistant District Directors, Chapter Advisors and Regional Vice Presidents have been invited to participate in this event for 2022. They will receive this Facilitators Guide and the Participant Guidebook in mid-December. They are invited to take the Birkman. There is a Train-the-Trainer session designed specifically for them on January 10 at 8:30 p.m. ET and a Follow-Up/Next Steps session on January 19 at 8:30 p.m. ET. During the actual Presidents' Academy, they are invited to participate in the Large Group Sessions and then there are special Small Group Sessions for leaders (not in your Small Groups!) to continue the conversations and training.

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.

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Welcome by Grand President Cory Stopka

Setting: Large Group
Duration: 15 minutes
Date: Friday, January 14, 2022
Start Time: 7:00 pm
End Time: 7:15 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

AV/Tech Needs

- Howspace Large-Group Page
- Live streaming
- Slide deck

Content

Start Time:	7:00 pm	End Time:	7:15	Duration:	15 minutes

Welcome by Grand President Cory Stopka
- Explain the history behind the Academy
- Explain the goal of the Academy
- Explain LF support of Academy and Jeff Zych Presidents' Academy fund specifically
- Offer thoughts and insights – COVID continues, DEI, risk management, YOU are the future, etc…
- Explain Ground Rules/Expectations
- Introduce facilitators

Essentials
- *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 discussion, acknowledge it immediately.

Plaid Introduction and Instructions

Setting: Large Group
Duration: 10 minutes
Date: Friday, January 14, 2022
Start Time: 7:15 pm
End Time: 7:25 pm

Overview

The purpose of this section is to introduce participants to the Plaid team, their role throughout the weekend, and how Howspace will be utilized throughout the weekend both in Large and Small Group Sessions.

Objectives

- Meet the Plaid Facilitators
- Learn to Navigate Howspace

Activities and Items Needed

- PowerPoint presentation

AV/Tech Needs

- Howspace Large-Group Page
- Live streaming
- Slide deck

Content

Start Time:	7:15 p	End Time:	7:25 pm	Duration:	10 minutes

Introductions
Facilitators should introduce themselves. Explain your role with Plaid and your role with Delta Sigma Pi at President's Academy. Spend about 5 minutes introducing the group to the concept of large group sessions and the purpose that large group sessions serve.

Navigating Howspace
Explain how to navigate the following features:
Large Group Sessions
Streaming and Howspace engagement
Small Group Sessions
Locating Small Group Page
Live Join Session and Breakout Groups
Freestyle Discussion Live Join Sessions
Homework Page

Small Group Icebreakers

Setting: Small Group
Duration: 30 minutes
Date: Friday, January 14, 2022
Start Time: 7:30 pm
End Time: 8:00 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 your 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
- Build trust and connection through shared stories

AV/Tech Needs

- Howspace Small Group Page
  - Group Notes pad
  - Parking lot pad
  - PDF of session materials
  - Countdown clock
  - Live meeting widget

Content

Start Time:	7:30 pm	End Time:	7:35 pm	Duration:	5 minutes
Opening/Introductions *Page 6 of the Participant Workbook* 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. *Page 7 of the Participant Workbook*					

- Describe the benefits of small group work
- Opportunity to dive deeper and more personally into overarching concepts
- Refer to the expectations set out by Cory Stopka:
  - 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.)

Start Time:	7:35 pm	End Time:	8:00 pm	Duration:	25 minutes

Never have I ever…. Deltasig Edition

Rules: Each person holds up both hands with all 10 fingers extended so that everyone else can see them over their webcam. The facilitator should read each of the 10 questions, one by one. If a participant has done what the facilitator asks, then the participant should put down one finger. There will be 10 questions in all, so if a participant has done all 10 things, then they would not have any fingers "up" at the conclusion of the game.

Questions
1. Never have I ever attended LEAD
2. Never have I ever attended Grand Chapter Congress
3. Never have I ever visited another chapter
4. Never have I ever held a business internship
5. Never have I ever attended a networking event

Now let's get a little more personal
6. Never have I ever dreamed about starting a business
7. Never have I ever thought about what I would do differently if I was the CEO of a big company such as Apple, Google, Amazon, Facebook, etc.
8. Never have I ever thought about what could be done to improve my chapter
9. Never have I ever had a difficult conversation with a member of my chapter
10. Never have I ever struggled with holding other people accountable

Start Time:		End Time:		Duration:	

If there is extra time, engage them in conversation about their expectation and desires for the program.

You can use this time to add items to the Parking Lot.

Birkman Basics

Setting: Large Group
Duration: 45 minutes
Date: Friday, January 14, 2022
Start Time: 8:05 pm
End Time: 8:50 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 in our professional and personal life. This program is designed to give ourselves an authentic look at ourselves, how we relate to others who may be different from self, and how we adapt to organizations we join.

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

Objectives

- Review Birkman orientation
- Learn how to read the Birkman Map
- Understand the basics of self-awareness

Activities and Items Needed

- PowerPoint presentation

AV/Tech Needs

- Howspace Large Group Page
- Live streaming
- Slide deck

Content

Start Time:	8:05 pm	End Time:	8:15 pm	Duration:	10 minutes
Birkman Background & Introduction to the Birkman *Participant Workbook pg. 9-13* 3 types of relationships - Roger Birkman story - Decoding the Birkman symbols and colors - Color Styles					
Start Time:	8:15 pm	End Time:	8:25 pm	Duration:	10 minutes
Interests					

Participant Workbook pg. 13

ACTIVITY: "In Howspace, please answer the poll 'Which color corresponds with your INTEREST symbol (*)?'" Results will appear after you respond.

ACTIVITY: "Below that poll find the chat thread that corresponds with your interest color. In the chat share your hobbies and what you are passionate about?" Just below that chat you will see a Word Cloud develop based on the responses.

Allow a Word Cloud to develop for each of the chat threads.

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:	8:25 pm	End Time:	8:30 pm	Duration:	5 minutes

Usual Behavior
Participant Workbook pg. 13

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:	8:30 pm	End Time:	8:35 pm	Duration:	5 minutes

Needs Dimension
Participant Workbook pg. 14-15

Explain what Birkman says about the color

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, my sisters.
- *Yellow is all about the joy of taking care of "family."*

Start Time:	8:35 pm	End Time:	8:45 pm	Duration:	10 minutes

Stress Behavior & Stress Management
Participant Workbook pg. 14-15

[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's 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:	8:45 pm	End Time:	8:50 pm	Duration:	5 minutes
Final Notes & Conclusion					
Symbol location and ability to relate					

- 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

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.

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Building Successful Teams

Setting: Small Group
Duration: 45 minutes
Date: Friday, January 14, 2022
Start Time: 9:00 pm
End Time: 9:45 pm

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 and skill sets 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

- 16 Leader Corp employee profiles (included in the Participant Guide)
- The Collaborative Model (included in the Participant Guide)
- Watch or phone timer to keep time

AV/Tech Needs

- Howspace Small Group Page
- Slide deck

Content

Start Time:	9:00 pm	End Time:	9:10 pm	Duration:	10 minutes
Introduction *Participant Workbook pg. 19*					

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:

"We said earlier that our goal of the 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 it is what it is. However, when you can, it can pre-determine success or failure."

Then prompt participants to think about what a great team looks like. Let's come to an agreement on what is the best example of a company or team. (Take about 5 minutes to discuss as a group) Use the questions below to help you open the discussion. Utilize the Howspace question prompts to help guide your conversation.

(Howspace questions will already be on your Small Group Page)
HOWSPACE QUESTION: What does a great team look like? (*A Word Cloud will develop below*)

HOWSPACE QUESTION: How does a great team act? (*A Word Cloud will develop below*)

HOWSPACE QUESTION: What is the best example of a team that you can think of? As you see responses come in, ask participants to share why they chose that company with the group.

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 participants 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.)

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.)

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

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

Review of Behavioral Patterns
Participant Workbook pg. 20

Briefly review the Interests and Usual Behavior of each 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 Birkman colors, explain the process model called The Collaborative Model (included in the participant guide). This model takes a two-phase process model (a planning and a doing phase) and overlays the Birkman colors on top of it. These colors 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.)

| Start Time:	9:20 pm	End Time:	9:32 pm	Duration:	12 minutes

Assembling a Team
*Participant Workbook pg. 21*

Facilitator should explain that they will split participants into Breakout Groups based on Birkman color Stress colors.

BREAKOUT ROOM INSTRUCTIONS:
You will see the following icons at the bottom of the black box on your Howspace interface. Select PEOPLE and then BREAKOUT GROUPS.
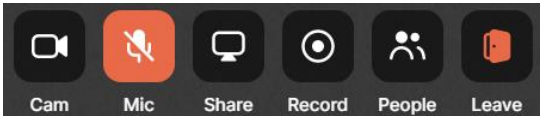
At the top of the Breakout Group pop-up screen, indicate that you want 4 groups, by utilizing the drop-down option for "No. of groups."
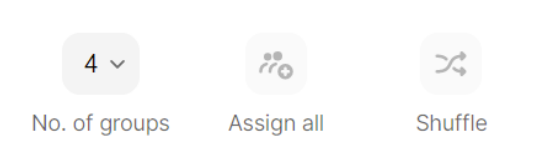
Scroll down past all your participants. Rename the four groups as the four Birkman Colors (Red, Yellow, Blue, and Green.)
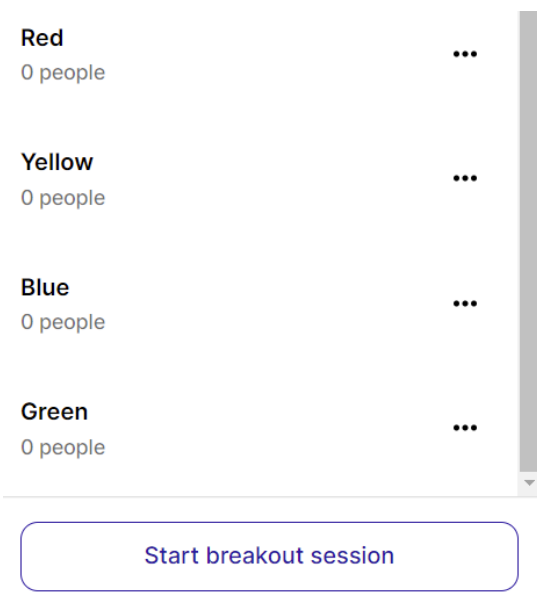
Select the "Start breakout session" button. Ask the participants to join the group color that corresponds with their stress colors. (If there's an odd number or only one of a specific color, pair them with a neighboring color on the map's Y axis [task vs. people.] Ex→ Yellow pairs with Red, and Blue pairs with Green.)
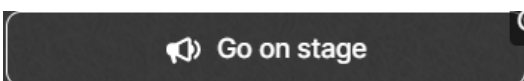
Once participants are in their group, select "Get on stage" button at the top of your Howspace interface and describe (or read) the following situation to participants:

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 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 about 10 minutes to select their team, then ask each color to present their slate of task force members. DO NOT allow them to explain their choice. We want all 4 colors to present their slate before discussing as a group.

After about 10 minutes close breakout rooms and invite them to share their selections.
NOTE: Before hitting "End Breakout Session" be sure to "Go on stage" and remind them to select "Leave Group" NOT "Leave Room" in order to return to the small group as a whole.

Start Time:	9:32 pm	End Time:	9:40 pm	Duration:	8 minutes

Debrief
After the groups have presented their selections, use the following questions to process and debrief the exercise:
- Which 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 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 personal Birkman color cause you to vote for similarity or difference from your choice?

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 the required players. In our world, we need our project teams or work units to balance all the personality types.

Understanding Organizational Purpose and Principles

Setting: Large Group
Duration: 30 minutes
Date: Friday, January 14, 2022
Start Time: 9:50 pm
End Time: 10:20 pm

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
- Participant Workbook pages 22-25

AV/Tech Needs

- Howspace Large Group Page
- Live streaming
- Slide deck

Content

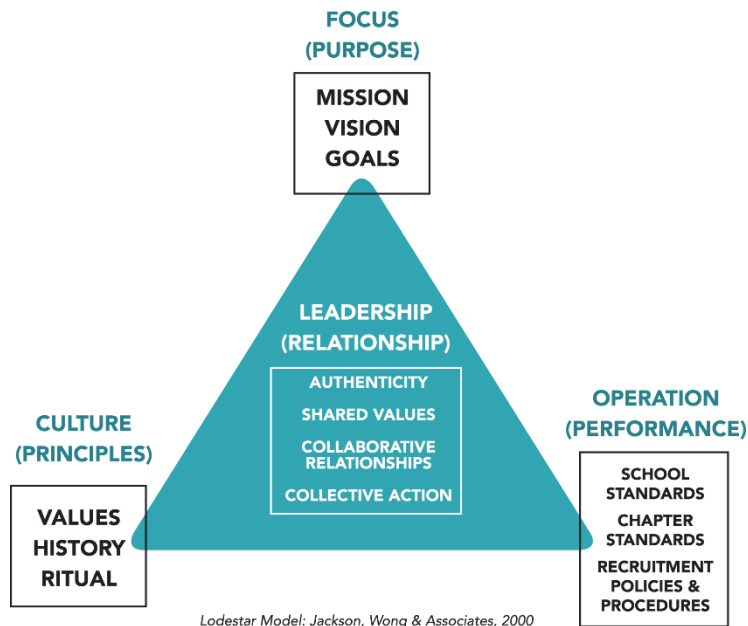| Start Time:	9:50 pm	End Time:	9:55 pm	Duration:	5 minutes
Introduction (What is a Lodestar?) <mark>Show the "What makes Deltasig who it is?" chat box</mark> **What makes Deltasig Deltasig?** Use the chat box and tell me what you think?					

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.

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:	9:55 pm	End Time:	10:05 pm	Duration:	10 minutes

Your Organizational Lodestars

Facilitator should describe each organizational lodestar, as identified by Plaid, and then review Deltasig'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?*
<mark>Hide the "What makes Deltasig who it is?" chat box</mark>
<mark>Show the "*What is vision?*" chat box.</mark>

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 the mission? How is it different from the vision?*
<mark>Hide the "*What is vision?*" chat box.</mark>
<mark>Show the "*What is the mission? How is it different from the vision?*" chat box.</mark>

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.

Organizational Culture (Principles)
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.

<mark>Hide the "*What is the mission? How is it different from the vision?*" chat box.</mark>
<mark>Show the "*What are Deltasig's core values?*" chat box.</mark>

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

Take responses, then show them their core values.

What is the most important Deltasig value to you?
Make your selection

Operations (Performance)
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.

What are some examples of Deltasig's operational documents?
Enter your ideas in the chat box

Show the word cloud

Comment that these are all good examples and mention others below if they were missed.

Examples include:
- Standard Operating Procedures
- Risk Management Policy
- Officer Structure
- Pledge Education Program

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

What is the most important Lodestar?

Give students time to select. Verbalize any observations you deem important about which lodestar students select.

Ask participants to use the chat windows to explain why they think the Lodestar they chose is most important. You can ask the following questions:
- Why do you think this lodestar is the most important?
- What makes this lodestar more important than the others?

Ask participants if they would like to change their choice. Allow them to use the existing poll widget and change their choice.

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

Verbalize observations from the changes that do or do not occur.					
Start Time:	10:15 pm	End Time:	10:20 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?*

Allow them to use the chat box to provide answers.

The final component for organizational success is leadership, 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, as well as external factors like the pandemic we've experienced over the last couple of years. No matter what circumstances are thrown your way, the 3 lodestars are your guiding light towards continued success."

Announcements

Prior to attending President's Academy, you were asked to complete some pre-work.

Pre-Work:

Prior to attending Presidents' Academy you were instructed to complete some pre-work as supplemental curriculum that will help set the stage for a couple of our sessions this weekend. These Ted Talks will better prepare you for a discussion about navigating difficult conversations with others. The additional pre-work assignments are to prepare for our Strategic Planning discussions tomorrow evening. You can find links to the Ted Talks and your Participant Workbook on the Pre-work page on Howspace.

- The first talk is by Arar Cohen and is entitled "How to Lead Tough Conversations."

- The second talk is by Joy Baldridge and is entitled "Difficult Conversations Made Easy." You only need to watch the first 4:40 of this talk.

- Review the Strategic Goal Setting Section in your Participant Workbook (pg. 39-45) in advance.

- The first talk is by John Doerr Ted Talk and is entitled "Why the secret to success is setting the right goals." In this talk you will learn about OKRs – Objectives and Key Results.

If you have not completed this Pre-Work, please be sure you have completed the pre-work prior to our opening session tomorrow.

This concludes day one of the Presidents' Academy. There is an optional Freestyle Discussion for student participants to attend. Tonight's Freestyle Discussions will begin at 10:30 pm and will be used as an opportunity to meet other participants and start building your network among your peers. On the Freestyle Discussion Page in Howspace, find the Live Join button that corresponds with your birth month.

For the volunteer leaders joining us today – thank you – and you are done for the evening. We look forward to seeing you again tomorrow.

Small Group Facilitators – we will do a quick Facilitator Huddle at 10:30 as well.

We will reconvene tomorrow at 1 pm eastern. Remember to be at least 5 minutes early to account for any technical issues. Additionally, don't forget to complete your pre-work by watching and be ready for tomorrow's discussions.

Presentation Notes for Reference:
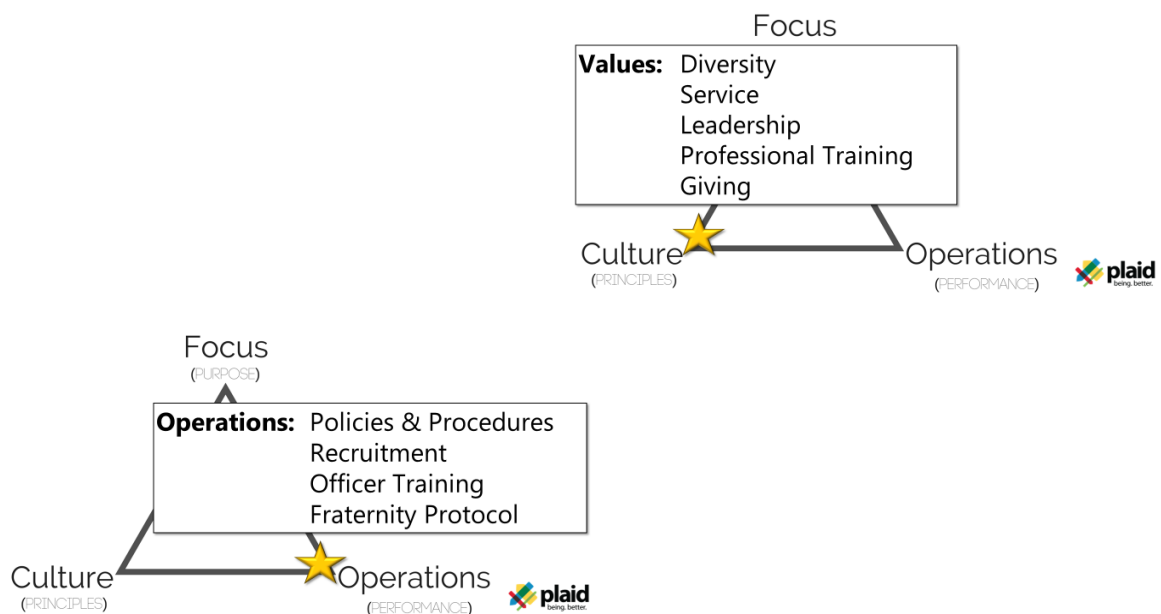
Freestyle Discussions (Optional) Get to Know Other Attendees

Setting: Breakout Rooms
Duration: 60 minutes
Date: Friday, January 14, 2022
Start Time: 10:30 pm
End Time: 11:30 pm

Overview

Free Style Discussions are optional opportunities for attendees to participate in an unfacilitated, freestyle conversation with other attendees. Friday evening session is simply an opportunity for attendees to meet, get to know, and network with one another. Join Live session will be divided by birth month.

Objectives

- Meet and network with other attendees
- Tonight will not have Moderators.

AV/Tech Needs

- Howspace Join Live Sessions (By Birth Month)

Content

Start Time:	10:30 pm	End Time:	11:30 pm	Duration:	60 minutes

Purpose:
Free Style Discussions are optional opportunities for attendees to participate in an unfacilitated, freestyle conversation with other attendees. Friday evening session is simply an opportunity for attendees to meet, get to know, and network with one another. Join Live sessions will be divided by birth month.

Designated Monitor Note (none for Friday night):
If you are assigned to serve as a monitor for one of the freestyle discussion sessions your role is to be present but silent. These conversation spaces are for attendees to engage with one another. Let attendees lead and contribute to the conversation.

It may be helpful to take note of the topics discussed and questions that are asked. These may help contribute to future freestyle topic areas throughout the weekend.

Listen for inappropriate topics in conversation and intervene if/when necessary.

Friday Facilitator Huddle

Duration: 30 minutes
Date: Friday, January 14, 2022
Start Time: 10:30 pm
End Time: 11:00 pm

Record your questions and notes here.

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Welcome by Past Grand President Tricia Smith

Setting: Large Group
Duration: 10 minutes
Date: Saturday, January 15, 2022
Start Time: 1:00 pm
End Time: 1:10 pm

Overview

Welcome the participants back for day 2 and set the stage for what's to come.

Objectives

Recapping the importance of balancing the lodestars, with examples from our board. Finish by emphasizing the importance of using the remaining time to augment their leadership toolkit with the relationships and people that can help them lead effectively. Then tee up the goals for the day.

AV/Tech Needs

- Howspace Large Group Page
- Live streaming
- Slides deck

Content

Start Time:	1:00 pm	End Time:	1:10 pm	Duration:	10 minutes
Welcome Back by Past Grand President Tricia Smith • Offer personal insights and story about being a leader • Mention LF support and other opportunities for students such as scholarships and CLF • What is coming up today					

Incentivizing, Motivating, and Accountability

Setting: Large Group
Duration: 20 minutes
Date: Saturday, January 15, 2022
Start Time: 1:10 pm
End Time: 1:30 pm

Overview

Moving team members forward requires leaders to incentivize and motivate their teams toward organizational lodestars and hold them accountable to those lodestars. 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 Birkman's 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

AV/Tech Needs

- Howspace Large Group Page
- Live streaming
- Slide deck

Content

Start Time:	1:10 pm	End Time:	1:20 pm	Duration:	10 minutes
Introduction *Participant Workbook pg. 27*					

Last night we discussed the importance of lodestars. As a brief recap the three lodestars are an organization's 1.) Focus (Purpose) which includes the mission, vision, and goals; 2.) Culture (Principles) which include the organizations values, history, and ritual; and 3.) Operations (Performance) which include your campus standards, chapter standards, and organization policy and procedures.

Now that we know what we're motivating our members toward (Delta Sigma Pi's lodestars), let's talk about *how* to move them that way. A good leader always takes account of the personality of individuals, collective dynamics, organizational lodestars 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.

Show the "What incentives do you provide to your chapter?" Chat box.

Show the "What incentives prompt you, personally, to do something?" Chat box.

Facilitator should instruct students to look at their How to Incentivize Me report and answer the following questions in Howspace via the chat boxes.

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 the supports members in the achievement of their goals.

Show the "How are you, personally, motivated?" chat box.

Show the "How do you motivate people within your chapter?" chat box.

Facilitator should prompt participants to look at their How to Motivate Me report and answer the following questions in Howspace via the chat boxes.
- 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:	1:20 pm	End Time:	1:25 pm	Duration:	5 minutes

Introduction to Organizational Focus
Participant Workbook pg. 28

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

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

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

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

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:	1:25 pm	End Time:	1:30 pm	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 members
- Creating systems that allow for multiple working styles is a good start

The next session will help participants put this into practice.

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Incentivizing, Motivating, and Accountability

Setting: Small Group
Duration: 40 minutes
Date: Saturday, January 15, 2022
Start Time: 1:35 pm
End Time: 2:15 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 Birkman work styles
- Apply work style considerations to business design

Activities and Items Needed

- May also want to refer to the Collaborative Model on *Participant Workbook* pg. 20
    - The process colors in the Collaborative Model coincide with work-style colors and can indicate where people might feel comfortable contributing to projects

AV/Tech Needs

- Howspace Small Group Page

Content

Start Time:	1:35 pm	End Time:	1:40 pm	Duration:	5 minutes
Introduction *Participant Workbook pg. 28* 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? ○ 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 Birkman work style inform what you already know about how you like to work?
    - Differentiate from Interests, here, in that work style refers to HOW they prefer to do what they are interested in. Ex→Someone with a Blue Interest and 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?
    - 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 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:	1:40 pm	End Time:	1:55 pm	Duration:	15 minutes

Business Design based on Work Style
Participant Workbook pg. 29

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?
    - (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?
    - (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?
    - (Consider traditional cubicle-style layouts, open floorplans, 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
- 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 min.):

BREAKOUT GRUOP INSTRUCTIONS:
You will see the following icons at the bottom of the black box on your Howspace interface. Select PEOPLE and then BREAKOUT GROUPS.
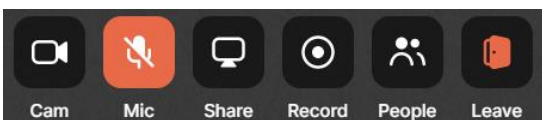
At the top of the Breakout Group pop-up screen, indicate that you want 4 groups, by utilizing the drop-down option for "No. of groups."

4 ⌄	🔹	⤬
No. of groups	Assign all	Shuffle

Scroll down past all your participants. Rename the four groups as the four Birkman Colors (Red, Yellow, Blue, and Green.)

Red
0 people   •••

Yellow
0 people   •••

Blue
0 people   •••

Green
0 people   •••

┌─────────────────────────────────────┐
│   Start breakout session   │
└─────────────────────────────────────┘

Select the "Start breakout session" button. Ask the participants to join the group color that corresponds with their organizational fit/work style. (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, and Blue pairs with Green.)

Before participants join their color group, explain the following prompt. This prompt will also be in Howspace if they need something to refer back to.

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.)

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.

The portfolio each group creates must include (write on the flip chart, if they need help remembering):
1. A specific business function
2. A reporting structure
3. An office layout/floorplan (to be drawn on flip chart paper)
4. 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.

Give participants about 8 minutes in their group before ending Breakout Groups.

NOTE: Before hitting "End Breakout Session" be sure to "Go on stage" and remind them to select "Leave Group" NOT "Leave Room" in order to return to the small group as a whole.

Start Time:	1:55 pm	End Time:	2:03 pm	Duration:	8 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:	2:03 pm	End Time:	2:10pm	Duration:	7 minutes

Group Design
After all 4 group discussions have occurred, 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?

Start Time:	2:10 pm	End Time:	2:15 pm	Duration:	5 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 than 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?
- What changes in your chapter do you think would be effective after this session?

People are unique and have unique needs. You need to consider the personalities of your members and your officers 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 different than you because that will encompass 75% of the world.

Presentation Notes for Reference:

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.

Navigating Difficult Conversations

Setting: Large Group
Duration: 20 minutes
Date: Saturday, January 15, 2022
Start Time: 2:25 pm
End Time: 2:45 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

- Birkman "Handling Conflict" Report

AV/Tech Needs

- Howspace Large Group Page
- Live streaming
- Slide deck

Content

Start Time:	2:25 pm	End Time:	2:28 pm	Duration:	4 minutes
Introduction					

Participant Workbook pg. 30

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.

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

You should have previously viewed 2 different videos pertaining to having difficult conversations. We chose those two Ted Talks because they set a good foundation for today's discussion of the topic.

In the talk by Adar Cohen entitled "How to Lead Tough Conversations," he had 3 main points.

• Move toward – not away from – the conflict
• Act as if you don't know anything about the situation, even if you do.
• Keep quiet, especially in the beginning.

Joy Baldridge gave some actually techniques that you could employ.

• Stay Flexible & Adaptable
• Be careful with your words
• Noticed & wondering
• Likelihood & when
• Really?

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.

Start Time:	2:29 pm	End Time:	2:36 pm	Duration:	7 minutes

Discussion of Fears
Participant Workbook pg. 31

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.

After giving them the chance to warm up, ask each group to name the fear they experience in conflict.

Show the four chat boxes for stress color asking, "What is your fear?" Ask participants to respond within the context of their fears in environments working with others.

Ask participants to respond in the chat box that corresponds with their stress color. Word Cloud will develop as participants respond.

BLUE 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*

GREEN 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*

RED is concerned about the possibility of the destructive damage that may occur.
- *Causing collateral damage*
- *Hastiness in timing*
- *Insensitivity toward others*
- *Not controlling anger*

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

Start Time:	2:36 pm	End Time:	2:43 pm	Duration:	7 minutes

Overcoming Fear of Conflict
Participant Workbook pg. 32

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.

Hide "What is your fear?" chat box.
Show "What is a statement that you really connect with in your report?" chat boxes.

Show "What is a statement that you think will be helpful to you as you manage conflict?" chat boxes.

Show "How might you have to adjust your behavior to effectively manage conflict?" chat boxes.

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?

Use the participants responses to expand upon the point that there are things that each of us can do to help manage conflict. Discuss what each Birkman color group can do to overcome their fear of conflict:

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

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

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

Yellows should:
- Proactively interact with others to gather information.

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

Start Time:	2:43 pm	End Time:	2:45 pm	Duration:	2 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 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: 40 minutes
Date: Saturday, January 15, 2022
Start Time: 2:50 pm
End Time: 3:30 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 Birkman personalities 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 conversaations

Activities and Items Needed

- Refer to pages 33-38 of the *Participant Workbook*

AV/Tech Needs

- Howspace Small Group Page

Content

Start Time:	2:50 pm	End Time:	3:00 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?
  - What about these conversations makes you avoid them?
- What difficult conversations have you had in the past?
  - How did they go?
  - What was the result?
  - How do you think Birkman personality might have played into it?
- What are you hoping to learn or practice today to make these conversations easier?

Start Time:	3:00 pm	End Time:	3:10 pm	Duration:	10 minutes

Explain the Process
Participant Workbook pg. 33

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
   - 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
   - Use "I" statements to make it clear that this is your perspective and describe effects on other stakeholders.
3. Describe the perception or impact
   - Again, use "I" statements or speak to unexpected results.
4. "Tell me more"
   - 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
   - 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 to what you believe the problem to be, it will be difficult to gain true commitment in a solution.
6. Brainstorm solutions
   - 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

- 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
   - 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 Guide.) 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:	3:10 pm	End Time:	3:20 pm	Duration:	10 minutes

**Individual Practice**
Participant Workbook pg. 34

Assign participants into Breakout Group with a partner. Create a group of 3 if there is an odd number of participants. Utilize the following instructions to set up Breakout Groups.

BREAKOUT GRUOP INSTRUCTIONS:
You will see the following icons at the bottom of the black box on your Howspace interface. Select PEOPLE and then BREAKOUT GROUPS.
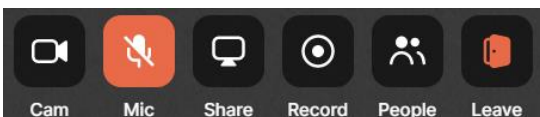
At the top of the Breakout Group pop-up screen, indicate that you want 6 groups, by utilizing the drop-down option for "No. of groups."
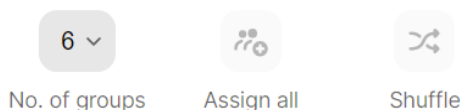
No need to rename the groups this time.

Select the "Start breakout session" button. Ask the participants to join a group so that they are in a room with a partner. If a group already has to participants have them select a different Breakout Group.

Before participants join their group 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. 34 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 Pledge Educator is ignoring Deltasig policies.
- The Chapter President talks to you about skipping a LEAD conference 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.

Give participants 10 min. to practice in pairs. End Breakout Group Session to bring them back to their larger small group.

NOTE: Before hitting "End Breakout Session" be sure to "Go on stage" and remind them to select "Leave Group" NOT "Leave Room" in order to return to the small group as a whole.

Start Time:	3:20 pm	End Time:	3:28 pm	Duration:	8 minutes

Final Role Play
After participants have practiced in pairs, ask for two 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 role play.

Start Time:	3:28 pm	End Time:	3:30 pm	Duration:	2 minutes

Debrief

After participants have completed their role play, 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.)

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.

Record your questions and notes here.
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Town Hall / Q&A Session

Setting: Large Group
Duration: 45 minutes
Date: Saturday, January 15, 2022
Start Time: 3:45 pm
End Time: 4:30 pm

Overview

This session is designed for the leadership of the Fraternity to offer Q&A time to its members. The panel will consist of Board, Staff and Leadership Foundation representatives and will be facilitated by Interim Executive Director Jeremy Levine.

Objectives

- Address questions and concerns from attendees.

AV/Tech Needs

- Howspace Large-Group Page
- Live streaming
- Slide deck
- Chat (how asking the questions)

Content

Start Time:	3:45 pm	End Time:	3:50 pm	Duration:	5 minutes
Introductions • Jeremy Levine to introduce panelists and explain format.					

Start Time:	3:50 pm	End Time:	5:27 pm	Duration:	37 minutes
Town Hall facilitated by Jeremy Levine. Panelists Cory Stopka, Jodi Schoh, Cody Vasquez, and Tyler Havens					

Start Time:	5:27 pm	End Time:	5:30 pm	Duration:	3 minutes
Conclusion by Plaid This is our last Large Group Session for the day. You will end the day in your Small Groups discussing Strategic Goal Setting. There is an optional Freestyle Discussion for participants to attend following the Strategic Goal Session. Tonight's Freestyle Discussions will begin at 6:00 pm and will be used as an opportunity to meet other participants and discuss operational topics of your choice. There will be an alumni moderator in each room to help with any questions, but they do not intend to be part of general conversation. Find the Join Live Session that corresponds with your topic of interest. We will reconvene tomorrow at 2 pm eastern. Remember to be at least 5 minutes early to account for any technical issues.					

Strategic Planning

Setting: Small Group
Duration: 80 minutes
Date: Saturday, January 15, 2022
Start Time: 4:40 pm
End Time: 6:00 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 to your chapter but also aids in accountability, engagement, and motivation.

Objectives

- Review the basics of effective strategy development and planning
- Identify trends impacting your chapter
- Identify your chapter's competitive advantage
- Develop strategic decision-making criteria
- Identify the most pressing opportunities or challenges facing your chapter
- Create goals to address chapter opportunities or challenges
- Identify steps to engage the chapter in these processes

Activities and Items Needed

- Strategic Planning workbook pages 39-45

AV/Tech Needs

- Small Group Howspace page

Content

Start Time:	4:40 pm	End Time:	4:45 pm	Duration:	5 minutes

Introduction – Strategy versus Planning
Acknowledge that each chapter probably has a process in place for planning each term. But how well can chapter members describe the strategy behind those plans?

We started the Presidents' Academy with a discussion of the Lodestars. Ask if participants recall what they are.
- Focus/Purpose
- Cultures/Principles
- Operations/Performance

Ask participants to recall from the workbook the distinction between strategy and planning and if any can share in their own words how strategy and planning relate to one another?
- **Strategy** is how a team leverages its unique strengths to advance its mission or purpose.

- **Planning** is how a team operationalizes its strategy and holds itself accountable. The most effective teams build a strategy rooted in their lodestars and strengths and then develop plans to carry out the strategy.

As you can see in the example in your workbook (pg. 40), a clear strategy can create a strengths-based sense of purpose to guide activities and operations, such as recruitment, pledge education, professional development, finance, fundraising, community and university service, and faculty and alumni relations. Strategy is a choice and provides clarity on where you will focus your efforts – and where you will not.

Today, we'll cover the steps for developing a strategy, including:
- Understanding relevant trends
- Identifying your competitive advantage
- Developing decision-making criteria
- Clarifying key questions
- Detailing and managing to actionable goals and plans

We'll move quickly through these steps, but in doing so we'll provide you with a framework to walk through each step with your chapter, advisor, and local alumni volunteer leaders.

Start Time:	4:45 pm	End Time:	4:55 pm	Duration:	10 minutes

Participant Workbook pg. 41

Trend Analysis – What trends are most likely to impact the chapter's ability to achieve its purpose?
As we've all seen in the past few years, the world can change quickly. Effective strategy is rooted in an understanding of the trends impacting your team and its mission.

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.
- How might that trend create positive opportunities for your chapter?
- How might it pose challenges?

Take a moment and list up to five trends relevant to your chapter, including their direction and their implications for your chapter.

Ask participants to share the trends they identified in the Howspace widget, **"What trends are most likely to impact the chapter's ability to achieve its purpose"?**

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

Participant Workbook pg. 42

Competition Analysis – With whom does the chapter compete for resources needed to carry out its purpose?

In addition to understanding key trends, it is also important to know what differentiating strengths you can build strategy upon. Understanding the competitive landscape can help to clarify your competitive advantage.

Scarce resources may include potential members, faculty/administrative support, volunteers, funding, public attention/awareness, campus or event space, collaborative opportunities, etc.

Ask participants to write answers to the following prompts. Ask participants to share their responses in the corresponding Howspace widget, <mark>"**With whom does the chapter compete for resources needed to carry out its purpose?**"</mark> A separate widget for Direct, Substitutes, and Resource will be available.

- What is one example of your chapter's direct competitors? Substitute competitors? Resource competitors? Keep in mind, you may collaborate with some of your competitors.
    - *Direct* competitors are most likely other business/economics-focused student organizations.
    - *Substitutes* are most likely other organizations providing opportunities for professional or personal growth, service, relationships with other students and the community, etc.
    - *Resource* competitors are most likely other organizations seeking the same students, facilities, volunteer or faculty members, campus/community attention, etc.
- What's the key strength of each of the competitors you named?
- What unique asset or execution strength does your chapter have that your competitors do not? Ask participants to share their responses in the corresponding Howspace widget, <mark>"**What unique strengths does your chapter have?**"</mark>

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

Participant Workbook pg. 43

Decision-Making Criteria

When making decisions in stressful situations, leaders risk becoming tunnel visioned and making choices that pull them away from their lodestars instead of aligning with them. One way to avoid this is to establish clear criteria in advance so that in such a situation, you can apply those criteria to increase the chances of making a good decision.

The process of developing criteria can address many of the common challenges organizations face.
- It ensures that the most relevant perspectives of a diverse group are baked into every decision.
- It provides clarity on the type of information needed before a decision can be made, making the prep work more efficient.
- It helps guide the conversation during a decision, so the group is focused on the most important things related to the choice.
- It provides a way to explain the rationale of past decisions to those impacted.
- It reduces the tendency of leaders to make emotional decisions or dig into positions without fully considering what is best for the group.

Ask participants to share one or two examples of criteria their chapter might use for decision-making. Check that they are broad enough to apply to many types of decisions; decision-specific criteria may be established using SMARTIE goals.

Start Time:	5:15 pm	End Time:	5:30 pm	Duration:	15 minutes

Participant Workbook pg. 44

Strategic Questions
One of the keys to good decision-making is asking the right questions. The most effective leaders help their teams to name and answer the most strategic questions facing the group, so that the answer to those questions can enable the team to make downstream decisions.

Here is where we begin to pull together the strategy components we've been talking about:
The Right Question + Clear Decision Criteria + Relevant Information = Good Decision

Strategy is a choice – The answer to your strategic question doesn't just provide guidance on what your chapter will do, but it also helps make clear what you won't do.

Ask participants to think about the context of their chapter:
- What trends did you identify?
- Who are the strong competitors in your space?
- What unique asset or execution strengths does your chapter possess?
- What new opportunity, competitive challenge, or business model challenge requires your chapter's focus?

Ask participants to draft a couple of potential strategic questions facing their chapter. After reflection, ask them to share an example and discuss potential answers their chapter may land on for each.

Examples of chapter-related questions may be:
- What are the implications for our chapter 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:	5:30 pm	End Time:	5:50 pm	Duration:	20 minutes

Participant Workbook pg. 45

Developing Strategic Plans
Now that 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?

After discussion, share the parts of a strong strategic plan:
1. **Objective**
2. **Key Results**

3. **SMARTIE Goal(s)**
4. **Designee(s)**
5. **Resources Needed**
6. **Risks**

We've just talked about your **objective** – the answer to your strategic question. But you can take that a step further by identifying **key results** – what will successfully answering that strategic question look and feel like? What will be that evidence of success? There may be multiple goals all working toward the same key result.

Next, we set **SMARTIE Goals** to move us toward those results. Who has utilized SMARTIE Goals before? How did that go for you? While SMART Goals have been around for a while, more and more groups are adding the I and E to their goal setting. What are some ways you might include inclusivity and equity in your goal setting?

You now have clarity on the work to be done, but who is doing it? Assigning a **designee** creates accountability and a point of contact for communications about that goal. This person does not need to be solely responsible for every task but will help keep things moving or proactively raise concerns.

Many goals just need people to do the work, but it can also be helpful to identify **resources needed**. Do you need funding to buy supplies, materials to construct something, access to a room on campus? Noting those resources needed up front can ensure you take steps with plenty of time to secure them.

Finally, it is important to outline important **risks**. Naming those risks is the first step toward being prepared, such as designing avoidance and mitigation plans.

Ask participants to reflect on their strategic question, propose an answer to it (their objective), and draft the additional elements of a strategic plan (key results, a SMARTIE goal, designee, a resource needed, a risk and how you might mitigate it). After reflection, ask them to share and discuss their drafts.

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

Debrief and Conclusion

You now have the building blocks and some techniques for developing a guiding strategy and plans for your chapter. Use the following questions to wrap up your time together in this session.

- What was it like to think about a strategy and goals for your chapter?
- Which elements might be most helpful to incorporate into your chapter?
- How might you start the process with your chapter?
- What challenges do you anticipate?
- How might you engage your faculty advisor and national officers?
- What questions do you have about strategy and planning?

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 semester. Remind them that even the best strategies and plans will fail if the team doesn't feel bought in to 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.

Freestyle Discussions (Optional) Chapter Operational Topics

Setting: Breakout Rooms
Duration: 60 minutes
Date: Saturday, January 15, 2022
Start Time: 6:00 pm
End Time: 7:00 pm

Overview

Free Style Discussions are optional opportunities for attendees to participate in an unfacilitated, freestyle conversation with other attendees. Saturday evening sessions will focus on chapter operations. The specific topics will be chosen by Delta Sigma Pi.

Objectives

- Meet and network with other attendees
- Topics to include: Recruiting, Finances/Fundraising, Community Service, Professional Development, Scholarship & Awards, Effective Meetings, Goals & Planning, Member/Pledge Education, Ritual, Risk Management
- Each topic to have an alumni moderator – a person to be there to answer questions as possible; not serving as a facilitator.

AV/Tech Needs

- Howspace Join Live Sessions

Content

Start Time:	6:00 pm	End Time:	7:00 pm	Duration:	60 minutes
Purpose: Free Style Discussions are optional opportunities for attendees to participate in an unfacilitated, freestyle conversation with other attendees. Saturday evening sessions will focus on chapter operations, and will have an alumni moderator who is there to help answer questions on the topic as helpful. **Designated Monitor Note:** If you are assigned to serve as a moderator for one of the breakout sessions your role is to be present but silent for the conversation. If a question arises that you are able to answer, do that. Don't offer options or be part of the general conversation unless requested by the presidents. These conversation spaces are for attendees to engage with one another. Let attendees lead and contribute to the conversation. It may be helpful to take note of the topics discussed and questions that are asked. These may help contribute to future freestyle topic areas throughout the weekend. Listen for inappropriate topics on conversation and intervene if/when necessary.					

Saturday Facilitator Huddle

Duration: 30 minutes
Start Time: 6:00 pm
End Time: 6:30 pm

Record your questions and notes here.

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Welcome Back by Leadership Foundation Executive Vice President Bill Schilling

Setting: Large Group
Duration: 10 minutes
Date: Sunday, January 16, 2022
Start Time: 2:00 pm
End Time: 2:10 pm

Overview

Welcome them back to day #3 and applaud them for all their participation thus far.

Objectives

The objectives are to recap what has occurred, explain what is to come, and also provide a general State of the Fraternity address.

AV/Tech Needs

- Howspace Large Group Page
- Live streaming
- Slide deck

Content

Start Time:	2:00 pm	End Time:	2:08 pm	Duration:	8 minutes
Welcome Back by Bill Schilling, LF EVP • Share insights and highlights from the weekend • Tie learning from PA to Strategic Priorities and chapter planning • Offer personal insights to leadership and what lies ahead • Foundation updates • Mention next steps after PA in terms of keeping the momentum going (there will be a couple of follow-up zooms planned along with their DDs and RVPs to discuss progress, needs and more.					
Start Time	2:08 pm	End Time:	2:10 pm	Duration:	2 minutes
Conclusion • What is coming up today • Ask them to stay engaged and involved one more day!					

Leading Like a Facilitator

Setting: Large Group
Duration: 20 minutes
Date: Sunday, January 16, 2022
Start Time: 2:10 pm
End Time: 2:30 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

AV/Tech Needs

- Howspace Large Group Page
- Live streaming
- Slide deck

Content

Start Time:	2:10 pm	End Time:	2:15 pm	Duration:	5 minutes
Introduction *Participant Workbook pg. 47-48* 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** <u>Facilitating means:</u> • 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**

Start Time:	2:15 pm	End Time:	2:27 pm	Duration:	12 minutes

Basic Facilitation Skills
Participant Workbook pg. 47

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.
- Is *neutral and never takes sides.*
  - 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 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.
- Developing a structure that allows for everyone's ideas to be heard
- Making members feel good about their contribution to the meeting. Be supportive of everyone's ideas and not criticize 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 you must make is good, 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:	2:27 pm	End Time:	2:30 pm	Duration:	2 minutes

Conclusion

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: 40 minutes
Date: Sunday, January 16, 2022
Start Time: 2:35 pm
End Time: 3:15 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

AV/Tech Needs

- Howspace Small Group Page
  o Group Notes pad
  o Parking lot pad
  o PDF of session materials
  o Countdown clock
  o Live meeting widget

Content

Start Time:	2:35 pm	End Time:	2:45 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 the most difficult thing?
- What other questions do you have about facilitation before we move on?

Start Time:	2:45 pm	End Time:	3:00 pm	Duration:	15 minutes

Participant Workbook pg. 49

Facilitated Meetings

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:	3:00 pm	End Time:	3:05 pm	Duration:	5 minutes

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 5 minutes of individual work time to complete the workbook activity.

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

Participant Workbook pg. 49

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 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?

Inspirational Leadership Keynote

Setting: Large Group
Duration: 45 minutes
Date: Sunday, January 16, 2022
Start Time: 3:40 pm
End Time: 4:25 pm

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

AV/Tech Needs

- Howspace Large Group Page
- Live streaming
- Slide deck

Content

Start Time:	3:40 pm	End Time:	3:42 pm	Duration:	2 minutes
Introduction *Participant Workbook pg. 52* Introduction of Stephen Sorenson by Onuka Ibe					

Start Time:	3:42 pm	End Time:	4:10 pm	Duration:	28 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.

Management v. Leadership

You must inspire.

Q&A time with Sorenson.

Start Time:	4:10 pm	End Time:	4:25 pm	Duration:	15 minutes

Feel free to add questions in our chat box on Howspace for our Q&A session with Stephen Sorenson.

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Closing Remarks & Next Steps

Setting: Large Group
Duration: 15 minutes

Date: Sunday, January 16, 2022
Start Time: 4:25 pm
End Time: 4:40 pm

Overview

Formally end the program – Cory Stopka and Tricia Smith

Objectives

- Closing Remarks

AV/Tech Needs

- Howspace Large Group Page
- Live streaming
- Slide deck

Content

Start Time:	4:25 pm	End Time:	4:30 pm	Duration:	5 minutes
Introduction Follow-up/next steps by Plaid. What to do with all this new information and relationships?					

Start Time:	4:30 pm	End Time:	4:40 pm	Duration:	10 minutes
Conclusion - Conducted by Cory Stopka and Tricia Smith. Closing Remarks, Q&A and thanks by Cory Stopka and Tricia Smith. Mention survey coming and please complete so future events even better. Mention follow-up to come, as mentioned by Bill earlier today, with their RVPs, DDs, ADDs, and CAs Mention the final Freestyle discussion opportunity following – for the students only. These topics will be chapter operation based. Thank the leadership for their participation and encourage their follow-up. Thank the small group facilitators for all. Thank the participants for a very intense and busy weekend that you hope prepares them for the best term in their chapter yet!					

Freestyle Discussions (Optional) Chapter Operational/Parking Lot Topics

Setting: Breakout Rooms
Duration: 60 minutes
Date: Sunday, January 16, 2022
Start Time: 4:45 pm
End Time: 5:45 pm

Overview

Free Style Discussions are optional opportunities for attendees to participate in an unfacilitated, freestyle conversation with other attendees. Sunday's sessions will focus on chapter operations specific topics or any remaining parking lot items that will be chosen by Delta Sigma Pi.

Objectives

- Meet and network with other attendees
- TBD if need any moderators based on parking lot items and desire to continue conversations from Saturday night. Moderators will be standing by.

AV/Tech Needs

- Howspace Join Live Sessions

Content

Start Time:	4:45 pm	End Time:	5:45 pm	Duration:	60 minutes

Purpose:
Free Style Discussions are optional opportunities for attendees to participate in an unfacilitated, freestyle conversation with other attendees. Sunday's sessions will focus on chapter operations specific topics or any remaining parking lot items that will be chosen by Delta Sigma Pi.

Designated Monitor Note:
If you are assigned to serve as to monitor for one of the breakout sessions your role is to be present but silent. These conversation spaces are for attendees to engage with one another. Let attendees lead and contribute to the conversation.

It may be helpful to take note of the topics discussed and questions that are asked. These may help contribute to future freestyle topic areas throughout the weekend.

Listen for inappropriate topics on conversation and intervene if/when necessary.

Appendix

Supplemental Material for Review by Facilitator

HBR

April 10, 2017

By Bill Taylor

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.

Taken from Subitup.com

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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