2025
Facilitator Guide

Schedule of Events

Friday – January 10th				
Start Time	**End Time**	**Duration**	**Type**	**Title**
1:00 pm	4:00 pm	3 hours		Facilitator Training & Preparations
4:00 pm	5:00 pm	60 min		Facilitator Personal Prep
5:00 pm	6:00 pm	60 min	Large Group	National Honorary Initiation
6:00 pm	6:50 pm	50 min	Large Group	Deltasig Leadership Professional Story
6:50 pm	7:00 pm	10 min		Passing Period
7:00 pm	7:50 pm	50 min	Large Group	Dinner & Networking
7:50 pm	8:00 pm	10 min		Passing Period
8:00 pm	8:15 pm	15 min	Large Group	Welcome by Grand President Paul Carpinella
8:15 pm	9:30 pm	75 min	Large Group	Your Personality at Work: Birkman Basics
9:30 pm	9:40 pm	10 min		Passing Period
9:40 pm	10:25 pm	45 min	Small Group	Small Group Introductions & Get to Know You Activities
10:30 pm	11:00 pm	30 min	Facilitators Only	Facilitator Huddle

Saturday – January 11th				
8:00 am	8:50 am	60 min	Large Group	Breakfast, Operation Roundtables & Networking
8:50 am	9:00 am	10 min		Passing Period
9:00 am	10:00 am	60 min	Small Group	Building Successful Teams
10:00 am	10:10 am	10 min		Passing Period
10:10 am	11:40 am	90 min	Large Group + Break	(1) State of the Fraternity & Purpose/Principles (2) Putting the Strategy in Strategic Planning
11:40 am	11:50 pm	10 min		Passing Period
11:50 am	12:35 pm	45 min	Small Group	Putting the Strategy in Strategic Planning
12:35 pm	12:40 pm	5 min		Passing Period
12:40 pm	1:30 pm	50 min	Large Group	Lunch
1:30 pm	1:35 pm	5 min		Passing Period
1:35 pm	2:20 pm	45 min	Large Group	Keynote
2:20 pm	2:30 pm	10 min		Passing Period

2:30 pm	3:00 pm	30 min	Small Group	Time Management & Prioritization
3:00 pm	3:10 pm	10 min		Passing Period
3:10 pm	3:40 pm	30 min	Large Group	Enhancing Team Morale & Engagement
3:40 pm	4:05 pm	25 min		Snack Break
4:05 pm	5:45 pm	100 min	Small Group + Break	(1) Enhancing Team Morale & Engagement | (2) Navigating Crucial Conversations
5:45 pm	6:00 pm	15 min		Passing Period
6:00 pm	7:05 pm	65 min	Large Group	Dinner
7:05 pm	7:15 pm	10 min		Passing Period
7:15 pm	8:15 pm	60 min	Small Group	Leading Meetings that Matter
8:20 pm	9:00 pm	40 min	Facilitators Only	Facilitator Huddle

Sunday – January 12th				
8:00 am	8:50 am	60 min	Large Group	Breakfast, Operation Roundtables & Networking
8:50 am	9:00 am	10 min		Passing Period
9:00 am	10:00 am	60 min	Small Group	Building a Legacy: Bringing it Back to Your Chapter
10:00 am	10:15 am	15 min		Break & Passing Period
10:15 am	11:00 am	45 min	Large Group	Call to Action | Farewell

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The Role of Facilitation

Objectives

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

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 solidifying learning • 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 participants experience and struggles • Developing appropriate relationships with participants and facilitators

What is Facilitation?

Communication

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

Personal Interjections

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

Group Participation

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

Group Atmosphere

- 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

Guiding Discussion

- 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

- Gently encouraging students to question the validity of their arguments
- Helping participants to examine their current realities that are outside the norm or against accepted standard
- Sharing experiences that may help participants identify new ways of doing things

Expectations of a Facilitator

Place a ✓ next to each expectation you feel comfortable meeting. Place a ✗ next to each expectation you have questions about. Use the space below to record your questions and notes.

Participate Fully

- ☐ Sit with students at educational sessions and at meals
- ☐ Complete worksheets and reflections along with students
- ☐ Use unprogrammed time to connect with students outside of the curriculum
- ☐ Remain with students during breaks rather than separating or isolating yourself
- ☐ Remain at Presidents' Academy for the duration of the event

Act as a Positive Role Model

- ☐ Model the behavior you want to see
- ☐ Show interest and attention at large group sessions
- ☐ Be attentive to group members' thoughts, ideas, and opinions
- ☐ Show respect to all Presidents' Academy attendees
- ☐ Be early or on-time for every session
- ☐ Model Fraternity values through your speech and actions
- ☐ Address disrespectful or otherwise unacceptable behavior from participants or group members
- ☐ Support the Fraternity Risk Management Policy and confront any violations

Facilitation Best Practices

Facilitators should know: It's not about you.

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

Facilitators should know: Trust the process.

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

Ideas for Dealing with Common Group Situations

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 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.

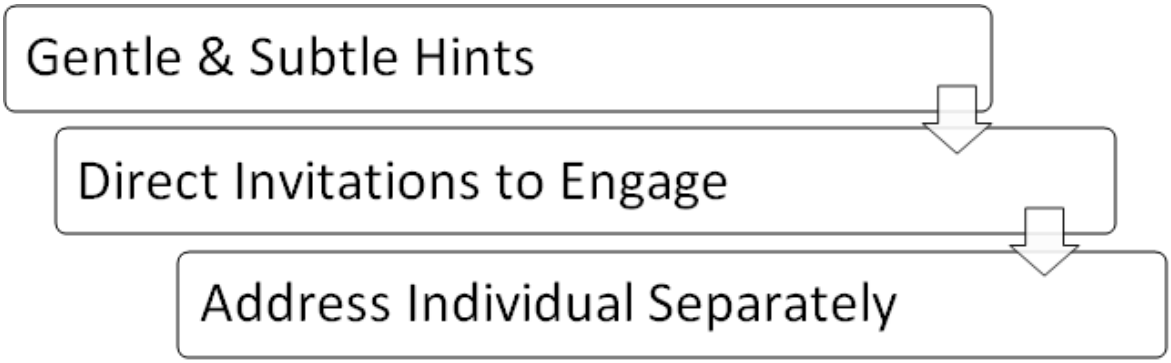
Make room for conflict and disagreement as long as it is productive.

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

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

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.



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 participants to consider other views.
- Invite other opinions from group members (use group opinion/pressure to your advantage).
- Address the importance of openness and positivity to the learning process.

Side Conversations

- Make eye contact with individuals.
- Ask participants for their attention and respect.
- Ask participants directly for their thoughts on the topic they are ignoring.
- Openly address side conversations with the group.

Academy Meetings

Facilitator Huddles

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

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

Small Groups

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

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

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

Understanding the Role of Small Group Meetings

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

- Small group meetings are focused on processing the educational session outcomes, NOT on sharing unrelated personal information.
- Parameters of the group meeting are followed, and no new curriculum pieces are introduced by facilitators.

- Competition between small groups is NOT encouraged by naming the group, developing personal chants, steps, calls, etc.
- Do not provide gifts for group members.
- Concentrate on processing the conversation and engaging participants rather than presenting and controlling the conversation.

Volunteer Engagement

District Directors, Assistant District Directors, Chapter Advisors and Regional Vice Presidents will be engaged again for this 2025 event, but it will be pre and post participation – not onsite. They will receive this Facilitator Guide and the Participant Workbook in mid-December. Volunteer leaders are encouraged to connect with their participants following Presidents' Academy to assist the participants with achieving their Leadership Action Plan.

National Honorary Initiation

Setting: Large Group
Duration: 60 minutes
Start Time: 5:00 pm
End Time: 6:00 pm

Overview

The purpose of this session is to initiate an Honorary Member of Delta Sigma Pi as well as provide participants the opportunity to see the proper way to perform the Initiation Ceremony.

Objectives

- Initiate an Honorary Member of Delta Sigma Pi
- Showcase the proper Initiation Ceremony to participants

Activities and Items Needed

- Initiation Ceremony props and regalia

Room Setup

- Theater style

AV/Tech Needs

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

Content

Duration	Welcome by Grand President
5 min	• Welcome participants • Introduce the Honorary Initiate
Duration	**Initiation Ceremony**
55 min	• Complete the Initiation Ceremony

Deltasig Leadership Professional Story

Setting: Large Group
Duration: 50 minutes
Start Time: 6:00 pm
End Time: 6:50 pm

Overview

The purpose of this session is to introduce participants to Deltasig alumni leaders and learn about their professional stories.

Objectives

- Learn about a variety of career paths and how a professional's journey develops over time
- Engage with Deltasig alumni

Activities and Items Needed

- N/A

Room Setup

- Theater style

AV/Tech Needs

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

Content

Duration	Introduction
5 min	• Introduce each Deltasig alumni
Duration	**Professional Story Sharing**
20 min	• Taking turns, each Deltasig alumni shares their professional story
Duration	**Q & A**
25 min	• Open the floor for questions from the audience for the panelists

Welcome by Grand President Paul Carpinella

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

Overview

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

Objectives

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

Activities and Items Needed

- PowerPoint presentation

Room Setup

- Theater style

AV/Tech Needs

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

Content

Duration	Welcome by Grand President
5 min	• Explain the history behind the Academy • Explain the goal of the Academy
Duration	**Ground Rules/Expectation for All Attendees**
10 min GUIDE MATCH: *Pages 8-9*	<u>Essentials</u> • Nametags: Wear them! All the time! • Workbooks: Bring them… to EVERY session and put your name in them so we can return them to you should you momentarily misplace them. • Feedback forms: These are in the back of the participant workbook. Complete them. Fill out after each session. You will

be asked to do an online survey Sunday and can refer to these notes.

Timeliness

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

Participation

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

House Rules

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

Risk Management

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

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

Your Personality at Work: Birkman Basics

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

Overview

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

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

Objectives

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

Activities and Items Needed

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

Room Setup

- Theater style

AV/Tech Needs

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

Content

Duration	Birkman Background and Introduction to Birkman Method
15 min	• 3 types of relationships • Roger Birkman story

GUIDE MATCH: pages 11-14	• Decoding the Birkman symbols and colors • Color Styles
Duration	**Birkman Interests**
15 min GUIDE MATCH: Page 15	ACTIVITY: Break out in the corner of the room that corresponds with the color of your INTEREST symbol (*). *Wait for everyone to move to their color and the room to settle.* ACTIVITY: You have 5 minutes to discuss and answer these questions. • What are your hobbies, and what are you passionate about? • What do you like to do in your free time? • What do you like most about that activity? • What is the common thread that runs through your group's interests? DEBRIEF: (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
Duration	**Birkman Usual Behavior**
15 min GUIDE MATCH: Page 15	ACTIVITY: Break out in the corner of the room that corresponds with the color of your USUAL symbol (diamond). *Wait for everyone to move to their color and the room to settle.* ACTIVITY: You have 5 minutes to discuss and answer these questions. It may be difficult to self-assess, so ask your fellow group members to describe these behaviors. • On a good day, what positive behaviors do you naturally exhibit? • What are some of your usual behaviors? • What are you like on a "good day"? • How did/would others describe you? DEBRIEF: (blue, green, red, yellow) • What are some of your usual behaviors? • What are you like on a "good day"? • How did/would others describe you? *Try to emphasize how their responses relate to their color.* *Explain what Birkman says about the color* BLUE • Insightful, selectively sociable, thoughtful, reflective, and optimistic GREEN • Competitive, assertive, flexible, and wildly enthusiastic about new things RED • Friendly, decisive, energetic, frank, logical, casual YELLOW • Team-oriented, orderly, concentrative, cautious, insistent

Duration	Birkman Needs
10 min GUIDE MATCH: Pages 16-17	ACTIVITY: Break out in the corner of the room that corresponds with the color of your NEEDS/STRESS symbol (circle/square). *Wait for everyone to move to their color, sit down, and the room to settle.* OVERVIEW: (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, and my brothers. • Yellow is all about the joy of taking care of "family."
Duration	**Birkman Stress and Stress Management**
10 min GUIDE MATCH: Pages 16-17	KEY POINT: Needs met equals good day, needs not met equals a bad day. OVERVIEW: (blue, green, red, yellow) BLUE • I've seen 90 out of 100 but there are 10 I haven't seen and there's no way I can decide 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 not sure. 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! • Green stress behavior is the Green Monster! RED • When the road is filled with ambiguity, roadblocks, and emotional stuff and my motor is running and running. It hurts my motor to go so slow. My motor is running and running and finally I can't take it anymore. 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. But then 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! • Red stress behavior is 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! • Yellow stress behavior is Yellow Angst! In times of stress, remember to act like the color opposite you. Blues address stress by thinking like Red, Green by thinking like Yellow, etc.
Duration	**Birkman Summary**
10 min GUIDE MATCH: Page 19-22	OVERVIEW: Review symbol location and ability to relate (Can be cut or shortened depending on time) • Extreme vs. shared color tendencies • Multi-quadrant maps vs. one-color maps • Invisible needs and the importance of clear communication BIRKMAN AND THE WORLD: • Personality breakdown across ALL Birkman scores worldwide • Show the Delta Sigma Pi group map on the PowerPoint slides. • Worldwide there is an even breakdown across the four personality types. • Here is Deltasig's group map for Presidents' Academy attendees. ASK: • Why is this important to know? SUMMARY: • We will talk about this more in-depth during our Building Successful Teams session tomorrow, but there is value in having a diverse representation within our teams, chapter, communities, etc.

GUIDE MATCH: Page 23	• Diversity is a variation in identities and backgrounds represented and the different personality types that make up a team. • Each personality type brings to the table a certain set of strengths that complement achieving the goals of a team. MAIN TAKEAWAYS: • Remember that the common denominator in all relationships is the self. Effective relationships with others begin with understanding yourself. • 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. BIRKMAN IN REAL LIFE: • The Birkman is a great tool to help us understand ourselves, how others may differ from us, and how best to engage and work with people that are different from us. • Our Birkman nametags during Presidents' Academy are helpful to provide context for other attendees' personality types. ASK: • When we leave here on Sunday, how do we determine the personality types of those we work with, like our fellow chapter leaders, chapter members, faculty/staff on campus, or our future employers and co-workers? • We practiced methods of learning about others during our Birkman colors activities. • We take the time to ask the right questions to better understand the interests, usual behaviors, stress behaviors, and needs of the people we work closely with. • By asking some basic questions and being genuinely interested in utilizing their response to adapt your future interactions with them will help you to develop a more trusting and productive relationship.

Small Group Introductions & Get to Know You Activities

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

Overview

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

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

Objectives

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

Activities and Items Needed

- Superpower Memory
- Shared Bucket List
- Flip chart
- Marker(s)
- Sticky Notes

Activities Relevance to the Birkman Method

- **Superpower Memory:**
  - **Purpose:** Fun and imaginative, this activity encourages creativity and self-expression while revealing personal strengths and aspirations.
  - **Birkman Connection:** This imaginative activity connects with the Birkman Method's insights into personal strengths and ideal self-expression. By creating superhero personas, participants explore their own strengths and how they wish to be perceived, fostering self-awareness and creativity.
- **Shared Bucket List:**
  - **Purpose:** Highlights personal aspirations and goals, fostering a sense of connection through shared dreams and ambitions.
  - **Birkman Connection:** Creating a shared bucket list aligns with the Birkman Method's focus on understanding personal goals and motivations. Participants can appreciate

how different motivations drive group dynamics and collective vision by sharing individual aspirations and finding common themes.

Room Setup

- As space allows, set up small group chairs in a semi-circle facing the flip chart to allow interaction and visibly of all participants for the Superhero Memory game and Shared Bucket List activity.

AV/Tech Needs

- None

Content

Duration	Introduction
5 min	• The facilitator should introduce themselves. • Spend about 5 minutes introducing the group to the concept of small group work and the benefits and expectations of these meetings. • Our main goal for tonight's small group session is to get to know one another. • We will play a couple of fun games to achieve this goal. As we play these games, we think about how what we are learning about each other may correlate with each other's personality types. • Use the "Overview" section of this session to describe the benefits of small group work • Opportunity to dive deeper and more personally into overarching concepts • Refer to the House Rules on pages 8-9 of the Participant Workbook • Participants are expected to attend all small group sessions • Ask participants what expectations they'd like to set for their group (Give them ownership, responsibility, and accountability in the expectation-setting process.) • Thank them for attending Presidents' Academy and a weekend away from home/campus. • Their dedication to their personal and leadership development is a testament to their dedication to their chapter and future career.
Duration	**Superpower Memory Game**
15 min	OVERVIEW: • To meet and learn each other's names, the facilitator will lead participants through a Superpower Memory Game activity, in

	which participants will sit in a circle and test their memory of one another's names. • After completing the circle, participants should be much more comfortable with each other's names, feel a bit looser and more relaxed, and be ready to move into the final get-to-know-you activity. ACTIVITY INSTRUCTIONS: • Instruct participants to sit or stand in a circle facing one another. • Participants will each share their name, Birkman's needs color, a superpower they want, what they would do with that superpower and an accompanying motion that represents that superpower. • Each participant (including the facilitator) should take a minute to remember their Birkman usual behavior color and a superpower they would want if they could have any superpower, what the first thing they would do if they had that superpower and an accompanying motion that represents that superpower. *Ex. Name: Sally | Birkman- Usual Behavior: Blue| Superpower: Speed| Action: Travel the World | Running Fast in Place* • It is helpful if the facilitator has already selected their *name-Birkman usual behavior-superpower-action* combination to use as an example. • Pick a place to start in the circle, and the participant will say "Hi, I'm <name, Birkman color, superpower, action>. *Ex. "Hi, I'm Sally, my Birkman usual behavior is Blue. If I could have any superpower, it would be super speed, so I can travel across the world every weekend." Sally would run in place.* • The next person in the circle will repeat the name, Birkman color and superpower of the person who came before them, and then add their own name, Birkman color, superpower and action. *Ex. "Hi, I'm Chris, my Birkman usual behavior is Green. My superpower would be super strength because I want to be able to lift, move and protect my loved ones" (while flexing arms). And that's Sally, her Birkman usual behavior is Blue, and she would love to have superspeed" (while running in place).*

	• This process repeats, and each new participant must repeat the <name-Birkman needs behavior-superpower>of all the people who came before. The last person in the circle is challenged with remembering everyone's name combinations.
Duration	**Shared Bucket List**
25 min	OVERVIEW: • After participants have learned one another's names and gotten a bit silly and loose, encourage them to share a bit more about themselves through a Shared Bucket List activity, which highlights personal aspirations and goals, finds common themes of the group's aspirations and goals, and fosters a sense of connection. • After the activity is complete, the facilitator should thank participants for their participation and debrief the activity purpose. By sharing individual aspirations and finding common themes, participants can appreciate how different motivations drive group dynamics and identifying a collective vision. ACTIVITY INSTRUCTIONS: • Sitting in a semicircle, ask each participate to spend 2 minutes writing their personal top 5 bucket list items on sticky notes, one sticky note per item. • After participants finish their personal lists, split the group into two teams. Each team will come up with a shared bucket list with 10 items they have agreed upon. These items do not have to be from each person's list of 5 bucket list items. The individual lists are intended to get their ideas flowing. • Each participant should consider their top 5 bucket list items as they begin creating their team's shared bucket list. • Participants should put their 5 individual sticky notes onto the flip chart paper for the team to draw common themes. • The team will determine and agree upon their top 10 team bucket list items and write them on the flip chart in order. • Teams will share with the larger group the 10 bucket list items they agreed upon and why these bucket list items are important to them. Think about values, personal needs, and how these items on the bucket lists connect. DEBRIEF: • What connections can we draw between these get-to-know-you activities and what we learned in the opening session? • What kinds of follow-up questions could we ask one another to learn more about how each person's superpower connect with what they care about in life?

	• What follow-up questions can we ask each other about our bucket lists to help us learn more about their dreams and ambitions? SUMMARY: • Regardless of the personality assessment used or the personality type a person may be, it's important that we take the time to get to know one another on a deeper level. • Learning about a person's interests, hobbies, and characteristics can tell us a lot about the type of person each of us is, how to build connections with one another, and each other's strengths. *Close out the evening by reviewing the schedule for Saturday morning. Share the time and location for breakfast and that you will meet back in small groups for Building Successful Teams at 9:00 am.*

Friday Facilitator Huddle

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

Record your questions and notes here.

Building Successful Teams

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

Overview

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

Objectives

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

Activities and Items Needed

- Members need Birkman Map nametag and workbook
- 16 Leader Corp employee profiles (included in the Participant Workbook)
- The Collaborative Model (included in the Participant Workbook)
- 10 puzzle pieces (from a larger puzzle) that must fit together to form a simple image or structure.
- Envelopes or bags to hold the puzzle pieces.
- A table or flat surface for assembling the puzzle.

Activity Room Setup

- Prepare 10 individual puzzle pieces, each unique and necessary to complete the final image or structure.
- Place each puzzle piece into an envelope or bag, ensuring that each participant receives only one piece.
- Arrange the students in a circle around the table or surface where the puzzle will be assembled.

AV/Tech Needs

- None

The Leadership Puzzle Activity Purpose and Objectives:

- **Purpose:** To foster teamwork, communication, and strategic thinking while understanding the role of different personality types (Birkman colors) in group decision-making.
- **Objectives:**
  - **Team Dynamics:** Understand how different personality types contribute to team decision-making and collaboration.
  - **Communication:** Highlight the importance of clear and effective communication in achieving a common goal.
  - **Strategic Thinking:** Encourage participants to think strategically about how to utilize each member's strengths.
  - **Problem-Solving:** Foster a collaborative approach to problem-solving under time pressure.

Content

Duration	Introduction
10 min	OVERVIEW: • Improving leadership skills is a main focus of Presidents' Academy, and the ability to build successful teams is often where good leadership begins. *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.* • One of the goals of Presidents' Academy was to impart leadership skills that would help you succeed in your professional careers and show you how those same skills can help you excel in leading your chapter. • This starts with building your teams to position you for success. • In the scenarios, when you don't get to choose your team, knowing how to determine and respond to individual team

	members strengths and needs in their uniquely personal way can set your team toward a destiny of success or failure. ACTIVITY: • Ask participants to think about what a great team looks like. • Split into groups of 3. • As a group, identify the best example of a company or team. *Give them about 5 minutes.* DISCUSSION: • What does a great team look like? • How does a great team act? • What is the best example of a team that you can think of, and why? As participants share their responses, relate them back to the common elements found in teams: • Common goals vs. individual goals • Commitment of members to common goals • High degree of interdependence among members • Team accountability DEBRIEF: • 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?
Duration	**Stages of Team Development**

5 min
 	
GUIDE MATCH:
Page 25
	OVERVIEW: Review the stages of team development sharing examples of what each stage looks like both within a chapter and career setting.
	
	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.
	
	  ○ Chapter Example: Adding new members, officer transitions, seniors graduating, advisor changes
	  ○ Career Example: Onboarding new employees, existing employee promotion, change in leadership, employee termination

	DEVLOPING/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.
	• Marked by identifying how they will work together and determining whose ideas will be followed.
	
	  ○ Chapter Example: Disagreements about the team's goals or priorities, competition for leadership roles or influence within the group, challenges in establishing effective communication and decision-making processes
	  ○ Career Example: Conflicting ideas on how to approach a task or project, personality clashes or differences in work styles leading to tension, pushback against new processes or changes in leadership
	
	MAINTAINING/NORMING:
	• The period where norms are developed, processes are decided, and conflict is being worked through.
	
	  ○ Chapter Example: Established meeting procedures and communication channels that everyone follows, a shared understanding of the chapter's values and goals, regular social events and traditions that foster a sense of belonging and camaraderie
	  ○ Career Example: A well-defined team charter outlining roles and responsibilities, regular feedback mechanisms and open communication within the team, a culture of mutual respect and support, where team members feel comfortable sharing ideas and challenging each other constructively
	
	PERFORMING/PERFORMING:
	• The period where norms and processes result in success and smooth working conditions. Team members work well together, and projects are completed.
	• The performance stage is difficult to reach, and many teams never reach Performing.
	
	  ○ Chapter Example: A successful philanthropy event that exceeds fundraising goals and strengthens community ties, a seamless officer transition where new leaders step in confidently and carry on the chapter's mission, a high level of member engagement and participation in chapter activities, resulting in a thriving and vibrant community

	○ Career Example: A project completed ahead of schedule and under budget, exceeding client expectations, a high-performing team consistently delivering exceptional results and exceeding performance targets, a positive and collaborative work environment where everyone feels valued and motivated to contribute their best SUMMARY: • These stages are fluid, and teams often move back and forth between them. • Many teams never make it to Performing and are constantly Maintaining or Norming. • Student organizations are most likely to be in Storming or Norming phases due to regular member turnover each year with integrating new members and graduating seniors, as well as leadership changes annually (or more often). • A thorough new member program and engaged alumni, in addition to detailed transition and succession plans for officers can help alleviate these cyclical team struggles. ASK: If time allows, ask students which stage their own chapter falls into.
Duration	**Behavioral Patterns**
10 min GUIDE MATCH: Page 26	OVERVIEW: • Briefly review the Interests and Usual Behavior of each personality type (Birkman color). • Interests can determine how workers prefer to spend their time. • Usual Behavior is what we most often see from people on a day-to-day basis. THE COLLABORATIVE MODEL: • This model takes a two-phase process model (a planning and a doing phase) and overlays the personality types (Birkman colors) on top of it. • These personality types can show us where team members/employees might be best placed within a job process or project. ASK: • 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.)
Duration	**The Leadership Puzzle Activity**
10 min	INTRODUCTION: • Explain that each participant has one piece of a puzzle, but no one knows what the final image or structure looks like. Their goal is to work together to complete the puzzle within 5 minutes. • Emphasize that each piece is vital, and they must communicate effectively to figure out how the pieces fit together. THE PUZZLE CHALLENGE: • Distribute the envelopes or bags with the puzzle pieces to each participant. • Allow the group 5 minutes to collaborate and assemble the puzzle. They may communicate and share their pieces, but they must figure out the correct placement of each piece together. GUIDELINES: • Encourage participants to consider the strengths and perspectives of each person in the group. • Remind them to be mindful of time, as they only have 5 minutes to complete the task. DEBRIEF: • What was that activity like for you? • How did your group approach the challenge of assembling the puzzle? • How did you decide where each piece should go? • Were there any moments of conflict or disagreement? How did you resolve them? • What role did communication play in your success (or struggle) with the task? • Did you notice any specific personality traits or Birkman color characteristics coming through during the activity? • How did the time constraint affect your decision-making and teamwork? • If you were to do this activity again, what would you do differently? • Did you use the Collaborative Model to achieve the objective? If so, how did that work for you? If not, why not?

	• Did you notice any stages of team development within your group work?
Duration	**Assembling Team Activity**
25 min GUIDE MATCH: Page 27	INTRODUCTION: • Split participants into personality type (Birkman color) groups based on Stress colors. (If there's an odd number or only one of a specific color, pair them with a neighboring color on the map's Y axis [task vs. people.] Ex. Yellow pairs with Red and Blue pairs with Green.) • Describe the following situation to participants: ACTIVITY PROMPT: 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 candidates for this team and have prepared a dossier of their profiles. All candidates are equally skilled and have similar competencies, so that should have no impact on your selection of team members. As these candidates 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. INSTRUCTIONS: • Provide a recommendation as to which 5 people should be assigned to the task force. Be prepared to justify your recommendation. • Give participants 10-15 minutes to select their team. • Ask each group to present their slate of task force members. • DO NOT allow them to explain their choice. We want all groups to present their slate before discussing it as a group. DEBRIEF: • Which personality type (Birkman dimension) did you think was most pertinent to the decision? Why do you believe it was most important? • What assumptions did you make about the "mood" or conditions that the task force would be operating within? • How would the "mood" or sentiment of the group affect which personality type (Birkman dimension) you would consider most important? • Did the purpose of the task force play into the decision?

	• It is preferable to have four different behavioral strength patterns. What was the deciding factor for the fifth selection? Why? • Did your personality type (Birkman color) cause you to vote for similarity or difference from your choice? • How does this selection process and a desire for a well-rounded team translate to you chapter experience? • How might this process and appreciation for a well-rounded team impact your future career? SUMMARY: • Successful teams can show up in many ways and whether you are choosing your team or not, as a leader it's important that you get to know your team members. • Learn their strengths, their passions, how they bring their best self to the team each day. Knowing this allows you to leverage your team's talents and expertise to the fullest extent. • In your role as President, this can show up in how you work with your fellow Executive Committee members, which are elected alongside you. OR this could be how you leverage the strengths of the members you assign to chair positions within the chapter. • After graduation, this will show up in your career or even organizations that you choose to volunteer. • Many of you may have heard the saying that a good leader surrounds themselves with people smarter than themselves. While that may be true, it doesn't matter how smart they are if they can't work together. • A good leader must be able to put people in the roles or on the teams where they are most likely to succeed. You can have a group of rock stars, but if you don't assign them to the right teams, projects, or in the correct roles, you can still come up short of expectations. • A great football team can't be made up of all quarterbacks. You need to build out the team with all of the required players. In our world, we need our project teams or work units to balance all of the personality types.

Organizational Purpose and Principles & State of the Fraternity

Setting: Large Group
Duration: 45 minutes
Start Time: 10:10 am
End Time: 10:55 am

Overview

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

- Organizational Focus (Purpose)
- Organizational Culture (Principles)
- Organizational Function (Performance)
- This session will explore how knowledge of and adherence to organizational lodestars will assist participants in both leading their chapter and in their careers.
- Grand President Carpinella will provide a State of the Fraternity Address intermittently through the lens of Delta Sigma Pi's purpose and principles.

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
- Gain insight into how the national organization is utilizing Deltasig's lodestars to guide decision making

Activities and Items Needed

- Participant workbooks
- Lodestar signs to hang
- Slide Deck

Room Setup

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

AV/Tech Needs

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

Content

Duration	Lodestars

5 min
 	
GUIDE MATCH:
Page 29
	INTRODUCTION:
	• 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.
	
	ASK:
	• Who here has heard of a lodestar before?
	• What is a lodestar?
	
	LODESTARS OVERVIEW:
	• 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)

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<tr><th>Duration</th><th>Delta Sigma Pi’s Lodestars</th></tr>
<tr><td>20 min

GUIDE MATCH:
Pages 30-31</td><td>OVERVIEW: Describe each organizational lodestar, as identified by Plaid, and then review Deltasig’s specific lodestars.

PURPOSE: Organizational Focus
• 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.
• It answers the question, 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 providing direction for where you want to end up and the mission is the broad roadmap which serves as a guide directing you toward your destination.

ASK: What is a vision?

• 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.</td></tr>
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	ASK: 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. ASK: What is a mission? How is it different from the vision? • A mission statement focuses on today and what the organization does. • It drives the organization, articulates what you do, describes your core objectives, and outlines the steps you take to meet those objectives. ASK: Who knows Delta Sigma Pi's vision or mission? • **Deltasig Vision:** To be a lifelong community of inclusive leaders committed to creating a world in which everyone can prosper in business and beyond. • **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. GRAND PRESIDENT ADDRESS: • How is Delta Sigma Pi living up to our mission? • What new initiatives, programs, changes, updates have occurred or are in the works that get the organization closer to achieving the vision? • How has the mission helped inform the decisions made to implement those initiatives? PRINCIPLES: Organizational Culture • The organizational culture is the tone or moral compass of an organization. • Culture plays a significant role in decision-making and setting priorities.

	• An organizations' Core Values fall into this area. Your principles (values) are used to make decisions that may be ethical in nature or involve competing values. ASK: What are Deltasig's core values? Deltasig's Core Values: • Professional Development • Diversity & Ethics • Service & Philanthropy • Leadership • Social • Organizational culture is highly influenced by organizational behaviors and actions (or lack of action). Organizations can state their core values, but if decisions made by leadership or the actions of team members are incongruent with the core values, that tells a very different organizational culture. • An organization's understanding and practice of the principles is a great time to consider how well the organization's principles align with inclusive and equitable practices for the team. GRAND PRESIDENT ADDRESS: • How do Delta Sigma Pi leadership and staff use the organization's core values to guide decision-making? • Are there specific examples, that you could share? • How do you see the core values being displayed at the national level? Chapter level? Member level? PERFORMANCE: Organizational Operations • The Organizational Function is the operational performance of an organization. This is the concrete, rubber-hits-the-road part of an organization. This is HOW you do what you are meant to do. Examples include: • Standard Operating Procedures • Risk Management Policy • Officer Structure • Pledge Education Program GRAND PRESIDENT ADDRESS: • Have there been any changes or updates to how Deltasig operates?

	• What changes to existing or creation of new policies, procedures, and other support resources can you share with us?
Duration	**The Most Important Lodestar**
5 min	ASK: Which is the most important lodestar? Make a decision and move toward the side of the room that corresponds with your choice. *Give students time to select. Verbalize any observations you deem important about which lodestar students select.* ASK (for each lodestar group): • Why do you think this lodestar is the most important? • What makes this lodestar more important than the others? • Who believes in their lodestar so much that they would make a case for others to choose it, as well? • Who will try to convince others to change their mind and leave their lodestar in favor of yours?
Duration	**Leadership and Relationships**
5 min	ASK: There is still one major component missing for organizational success; what is it? *Take a few participant answers before instructing all participants to move back to the middle of the room.* • The final component for organizational success is leadership, 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. • Leadership is understanding, owning, teaching, and expecting from others the Lodestars of the organization, bringing positive dynamics and cohesiveness to the team, and moving the team members toward the organizational Lodestars. GRAND PRESIDENT ADDRESS: • As the Grand President of Delta Sigma Pi, how have you utilized you role to ensure the organization is steering towards each lodestar? • How have you seen other Deltasig leaders utilize the lodestars to steer the organization toward success?

	SUMMARY • There once was a man standing along a country road when an angry mob ran by headed toward town. As they ran by, pitchforks and torches in hand, the man exclaimed, “please tell me where you are going so that I can lead you.” • Without the 3 lodestars, you, your chapter, or your business is like that mob. Held together merely by momentum, but devoid of cohesive aims. As their leader, you may as well be that man on the side of the road. Lodestars keep your eye on the prize and promote long-term, sustained success even through leadership, and team member changes. • While your chapter may have your own self-defined goals, ultimately Delta Sigma Pi at the local, chapter level and at the national level should be utilizing the same three lodestars to guide the organization.

10-minute Break

Putting the Strategy in Strategic Planning

Setting: Large Group
Duration: 35 minutes
Start Time: 11:05 am
End Time: 11:40 am

Overview

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

Objectives

- Review the leading practices for landscape assessment, strategy development, and implementation planning
- Identify steps to engage the chapter and Fraternity volunteers in these processes

Activities and Items Needed

- Participant Workbook

AV/Tech Needs

- Slide deck
- Projector

Content

Duration	Introduction
5 min	• Acknowledge that each chapter probably has a process in place for planning and assigning tasks. ASK: Find a partner near you and answer the following questions. • How well can chapter members articulate and motivate people around the <u>why</u> behind those plans? • How quickly can your chapter adjust your plans in response to a disruption? • How effectively can you prioritize among those plans when resources (people, time, money, etc.) are short? DEBRIEF: After about 5 minutes have a few share with the larger group before moving on.

Duration	Strategy vs. Planning
5 min GUIDE MATCH: Pages 33-34	• **Strategy is** defined as how a team leverages its unique strengths to advance its purpose. • **Strategy is a choice** and provides clarity on where you will focus your efforts – and where you will not. • **Planning** is how a team operationalizes that strategy and holds itself accountable for results. • A strengths-based strategy can provide the direction and motivation to guide activities and operations such as recruitment, pledge member education, professional development, financial management, fundraising, community and university service, and faculty and alumni relations. Today, we'll cover three phases of strategic planning: • Assess • Decide • Act
Duration	**Assess**
10 min GUIDE MATCH: Pages 35-36	OVERVIEW: • Effective strategy is rooted in an understanding of the landscape impacting your team and its purpose. This includes an understanding of trends and competition relevant to your team. ASK: How could a landscape assessment lead to a good strategy? • With a clear understanding of the context in which your team is operating, you can identify important challenges or opportunities. • It allows you to consider which strengths you can draw on for the greatest chance of success. • The assessment phase can be broken down into a two-part analysis; trends and competition. TRENDS: • **Trends** may be at multiple levels: national Fraternity, regional Fraternity, chapter, campus, local community, etc. • Trends may be in various categories, such as demographic, social, or economic. • When analyzing trends, consider both the trend and the implications for your chapter. DELTASIG TRENDS: • What trends is Deltasig seeing on a national level? • How is that impacting the organization?

	• How do you anticipate that impacting the chapter level and member experience?
	
	CHAPTER EXAMPLE:
	• You have learned that student enrollment in your school of business is increasing. So, you have identified a trend, but what are the implications?
	
	ASK:
	• How might that trend create positive opportunities for your chapter?
	• How might it pose challenges?
	
	COMPETITION:
	
	ASK: Why might it be helpful to understand who in your field competes with you?
	• By understanding the focus and strengths of competitors, you can hone in on which of your team's strengths bring united value and what types of collaborations you might pursue with organizations that have complementary strengths. In fact, you might even find mutual value in collaborating with your competitors.
	• There are three different types of competitors in a given field.
	  ○ *Peer Competitors* have the same focus as yours — they do what you do in the same places you do it. What might be some examples of peer organizations for your chapter? [These are most likely other business/economics-focused student organizations.]
	  ○ *Substitute Competitors* meet the same needs that you meet, but in a different way. What might be some examples? [Substitutes are most likely other organizations providing opportunities for professional or personal growth, service, relationships with other students and the community, etc.]
	  ○ *Resource Competitors* have a different focus than your team, but compete with you for resources. What might be some examples? [Competitors are most likely other organizations seeking the same students, facilities, volunteers, faculty members, or campus/community attention, etc., such as athletic teams, arts groups, student publications, the alumni association, etc.]
	
	RECAP:
	• Strategy is what will help us provide clarity and direction to our teams.

	• Strategy helps us leverage our strengths to achieve our purpose. • Strategy is different from planning, which is significantly more operational and involves accountability for results. • To access the landscape, you are going to (1) Analyze trends and (2) Analyze competitors in your field. • Assessing the landscape helps us lay a foundation for an effective strategy. • Analyzing trends helps us raise our awareness of the conditions and issues relevant to our team's work. • And taking stock of the strengths of our competitors helps to clarify your unique offering and opportunities for positive partnerships.
Duration	**Decide**

15 min
 	
GUIDE MATCH:
Page 37
	OVERVIEW:
	• Now that we understand the context of our landscape, we can begin determining our strategy. Recall that *Strategy is how a team leverages its unique strengths to advance its purpose.* With this in mind, we'll determine our strategy using three steps:
	  ○ Identify our team's value proposition
	  ○ Name our decision-making criteria
	  ○ Identify — and answer —our most important strategic question
	
	VALUE PROPOSITION:
	
	ASK: Which of your chapter's core strengths set you apart from competitors in ways that your intended audiences value?
	
	• Often these strengths take the form of either asset or execution strengths.
	  ○ Some strengths take the form of a unique asset, such as a particular location or facility, a proprietary process or technology, a massive and difficult to replicate "head start," or even a specific, sought-after individual expert.
	  ○ Other strengths include better execution of activities, programs, service delivery, or management functions than others in your field.
	
	DELTASIG ASSETS:
	• What would you consider to be Deltasig's assets from a national organization perspective?

GUIDE MATCH: Pages 38-39	DECISION-MAKING CRITERIA: ASK: Raise your hand if you have ever experienced decisions where: • The needs of a key stakeholder group were overlooked or ignored? • There was insufficient preparation or information gathered in advance to lead to an informed decision? • The discussion on the decision was unfocused or stuck on irrelevant topics? • People argued based on their emotions or attachment to a position rather than focusing on what would be best aligned with the group's lodestars? • After a decision was made, leaders struggled to explain the rationale to those impacted? • Developing a set of decision-making criteria before the need arises ensures the most relevant information is gathered in advance, roots a decision in the organization's lodestars, and provides clear rationale about the decision to share with those impacted. • Predetermined decision-making criteria can be especially helpful during a crisis situation, where a decision must be made quickly and with limited information. • It is important that the criteria are broad enough to apply to many types of decisions. Criteria that are too narrow will fail to be useful in all but very specific situations. DELTASIG DECISION-MAKING CRITERIA: • What is the decision-making criteria from the national lens? STRATEGIC QUESTIONS: • **Remember, strategy is a choice**. In fact, an easy way to think of making a good choice is the following equation: ***The Right Question + Clear Decision Criteria + Relevant Information = Good Decision*** • We've covered decision criteria and relevant information through assessment, now let's talk about asking the right question. • Answering the most strategic question provides the clarity that can enable the team to answer downstream questions. • **The answer to your most strategic question is your strategy.** In fact, the answer to your strategic question doesn't just provide guidance on what your chapter will do, but it also helps make clear to everyone what is not worth doing.

	DELTASIG STRATEGIC QUESTION/S: • From the national organization perspective, what strategic questions is Delta Sigma Pi asking to inform their strategy? CHAPTER STRATEGIC QUESTIONS: • What are the implications for our chapter's operations of the new campus policy on ____? • How can we most effectively support the career and professional development needs of students across the business school? • How can we engage alumni members to support our Chapter Leadership Funds? • What approach to 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 or other business organization on campus? Now, we're going to move back into our small groups where we will assess our landscape, create a foundation for decision-making, and discuss a framework for action-planning.

Putting the Strategy in Strategic Planning

Setting: Small Group
Duration: 45 minutes
Start Time: 11:50 am
End Time: 12:35 am

Overview

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

Objectives

- Review the leading practices for landscape assessment, strategy development, and implementation planning
- Identify steps to engage the chapter and Fraternity volunteers in these processes

Activities and Items Needed

- Participant Workbook

AV/Tech Needs

- N/A

Content

Duration	Strategic Planning Process
30 min GUIDE MATCH: Page 40	Recap the elements of an effective strategy: assess, decide, and act. ASSESS: • Ask participants to assess important elements of their chapter's landscape, using the template provided in their participant workbook. • They may choose to identify trends and their implications, competitors and their strengths, or a combination. • After about 5 minutes, ask participants to share their analyses in pairs or groups of three. Encourage them to ask probing questions of the student who is sharing. • Ask each participant to share with the full group one item from their analysis.

GUIDE MATCH:
Page 37
	DECIDE:
	• Now that we understand the context of our landscape, we can begin determining our strategy.
	• Ask if participants recall our definition of strategy. [*Strategy is how a team leverages its unique strengths to advance its purpose*.]
	• The three decision-making steps are:
	  ○ Identify our team's value proposition
	  ○ Name our decision-making criteria
	  ○ Identify — and answer —our most important strategic question
	
	VALUE PROPOSITION:
	• Let's start with the value proposition. Put another way, which of your team's core strengths set you apart from the competition in ways that your intended audiences value?
	• Ask participants to write their chapter's value proposition and then share in pairs or groups of three.
	• As each student shares, encourage those listening to ask probing questions to help determine if the strength being shared is truly differentiating, present in the chapter now (rather than aspirational), and of value to the chapter's stakeholders.
	• Participants may choose to revise their value proposition based on the peer feedback.
	• Ask each participant to share their value proposition with the full group.
	
	DECISION-MAKING CRITERIA:
	• Now that we know what makes you uniquely valued, let's shift to creating decision-making criteria.
	• Ask participants which resonate most with them. What criteria seems missing that might help their chapter's deliberations?
	• Ask each participant to write down up to five items for their chapter to consider as decision-making criteria.
	
	STRATEGIC QUESTIONS:
	• As mentioned before, **strategy is a choice**. This is reflected in the equation:
	
	The Right Question + Clear Decision Criteria + Relevant Information = Good Decision

- **The answer to your most strategic question is your strategy.** This not only clarifies what your chapter will do, but it also helps make clear to everyone what is not the best use of your time.
- Let's walk through a couple of examples together to ensure we understand how to utilize this formula and make decision accordingly.

DECISION FORMULA EXAMPLE:

Good Example:
Scenario: A student organization is deciding on a major fundraising event for the year.

- **Right Question:** "Which fundraising event will generate the most revenue while aligning with our organization's values and engaging our members?"
- **Clear Decision Criteria:**
  - Potential revenue
  - Alignment with organization's mission and values
  - Level of member engagement and participation
  - Feasibility and resource requirements
- **Relevant Information:**
  - Past fundraising event performance data
  - Member surveys on interests and preferences
  - Budget and resource constraints
  - Market research on popular fundraising trends
- **Good Decision:** After careful analysis, the organization chooses a charity auction that aligns with their values, has high potential revenue, and encourages active member involvement. The event proves to be a success, exceeding fundraising goals and fostering a sense of community.

Good Example
Scenario: A student chapter is deciding which community service event to organize for the semester.

- **The Right Question:** "Which community service event will have the most significant positive impact on our community while also maximizing member engagement?"
- **Clear Decision Criteria:**
  - Impact: Measurable positive change in the community.
  - Engagement: High level of participation and enthusiasm from chapter members.
  - Feasibility: Resources and time required are manageable within the chapter's capabilities.

	○ Alignment with Values: The event aligns with the chapter's mission and values. • **Relevant Information:** ○ Community Needs Assessment: Research on pressing social issues in the local area. ○ Member Survey: Chapter members' interests and preferences for different event types. ○ Past Event Data: Success rates and lessons learned from previous philanthropy efforts. ○ Resource Analysis: Budget, volunteer availability, and logistical considerations. • **Good Decision:** After careful analysis of all the information against the established criteria, the chapter chooses to organize a mentorship program for underprivileged high school students, aligning with their values and having a lasting impact on the community, while also garnering high member engagement. **<u>Bad Example</u>** **Scenario:** A student chapter is considering changing its meeting location. • **The Wrong Question:** "Should we change our meeting location?" (Too broad and doesn't address the core issue) • **Unclear Decision Criteria:** ○ "Better Location" (Vague and subjective) ○ "More Convenient" (For whom? Members? Officers?) • **Lack of Relevant Information:** ○ No member survey: No data on current member satisfaction with the existing location. ○ No alternative options explored: No research on potential new locations and their pros/cons. ○ No cost-benefit analysis: No consideration of potential financial implications of a move. • **Bad Decision:** The chapter decides to move to a new location based on a few vocal members' complaints without a thorough assessment, resulting in lower attendance, increased costs, and overall dissatisfaction. KEY TAKEAWAYS: • The Right Question: Sets the direction for the decision-making process and ensures focus on what truly matters. • Clear Decision Criteria: Provides a framework for evaluating options and helps avoid subjective or biased choices. • Relevant Information: Ensures decisions are based on facts and insights, increasing the likelihood of success.

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

15 min
 	
GUIDE MATCH:
Page 41
	ACT:
	• Once you are clear on your strategy, it is time to develop goals and organize them into a plan.
	
	ASK:
	• 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?
	
	SMARTIE GOALS:
	• Ask who in the group is familiar with the concept of SMARTIE Goals and can define what the acronym means. If any have used SMARTIE goals before, ask how they experienced it.
	• SMARTIE stands for:
	  ○ Specific
	  ○ Measurable
	  ○ Attainable
	  ○ Relevant or Realistic
	  ○ Time-Based
	  ○ Inclusive
	  ○ Equitable
	• While SMART Goals have been around for a while, more and more groups are adding Inclusion and Equity to their goal setting. What are some ways you might include inclusivity and equity in your goal setting?
	• Ask participants to reflect on their strategic question and its answer, and draft one or more SMARTIE goals. After reflection, ask them to share in pairs or groups of three.

	SUMMARY: • You now have the building blocks and some techniques for assessing your landscape, making decisions, and action planning. • While you've worked today as a team of one, the most effective leaders engage their teams throughout each of these processes to ensure the strategy and plans have the best chances of success. ASK: • How might you start the strategic planning process with your chapter? • What challenges do you anticipate? • What support might you need? • How might you engage your Chapter Advisor and District Director? NEXT STEPS: • Encourage participants to meet soon after the Academy with their chapters and faculty/alumni volunteers to design a process to engage the full chapter in developing a strategy and plans for the remainder of the term. • Remind them that even the best strategies and plans will fail if the team doesn't feel bought into them; the importance of working with the chapter to agree on the path forward can't be understated.

Keynote Speaker

Setting: Large Group
Duration: 45 minutes
Start Time: 1:35 pm
End Time: 2:20 pm

Overview

The keynote speaker is an opportunity for participants to learn from and be inspired by a highly successful business person.

Objectives

- Share a business career success story and their unique path towards success and the current role.
- Inspire the participants

Activities and Items Needed

- Question and answer session after speaker concludes if time allows

Room Setup

- Theater style

AV/Tech Needs

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

Content

Duration	Introduction
2 min	Introduction of the keynote by Paul Carpinella.
Duration	**Keynote Speaker**
30 min	Leadership Keynote
Duration	**Q&A and Wrap Up**
13 min	Closing Remarks, Q&A, and thanks by Paul Carpinella.

Time Management & Prioritization

Setting: Small Group
Duration: 30 minutes
Start Time: 2:30 pm
End Time: 3:00 pm

Overview

The purpose of this session is to introduce participants to the concepts of time management and prioritization, learn the correlation between those topics and being a successful leader, and practice utilizing a model for effective time management and prioritization. Participants should also correlate time management and prioritization with the strategic planning content discussed prior to lunch.

Objectives

- Introduce participants to time management and prioritization and the correlation these two topics have with leadership and strategic planning
- Practice utilizing the Eisenhower Method

Activities and Items Needed

- Flip chart paper
- Markers

Room Setup

- A circle of chairs for each participant to see one another and the flip chart paper for the activity

AV/Tech Needs

- None

Content

Duration	Introduction
10 min GUIDE MATCH: Page 43	• Welcome the participants back to the small group and introduce the topic of time management and prioritization. • Briefly discuss the importance of these skills in college, their role as a chapter leader, and professional life. ASK: In your own words, how would you define time management? • **Time management** is the process of organizing and planning how to divide your time between specific tasks and activities.

	• Effective time management helps you work smarter, not harder, ensuring that you complete more tasks in less time, even when facing tight deadlines.
	• It involves prioritizing tasks, setting goals, scheduling, and avoiding procrastination to make the most efficient use of your available time.
	
	ASK: How do you typically manage your time?
	
	• You may use a digital or written calendar to schedule classes, chapter meetings or events, work schedules, study time, workout time, social time, etc.
	• Some may thrive with a much more structured routine, while other prefer to have the flexibility to adapt their schedule and routine on a regular basis.
	
	ASK: What about prioritization? How would you define prioritization and how is it different than time management?
	
	• **Prioritization** is a key component of time management, specifically about deciding **what** to focus on first, while time management includes **how** to organize, schedule, and allocate time to complete those tasks efficiently.
	• In short, prioritization helps determine the **order of tasks**, while time management ensures you allocate time effectively to complete them.
	
	ASK: Why do you think these two skills are important to practice and master as a college student? Leader in Deltasig? In your future career?
	
	• **Time management and prioritization** are crucial for college students, student leaders, and their future careers because they help:
	  ○ **College Students**: Manage academic workloads, extracurricular activities, and personal responsibilities effectively, reducing stress and preventing burnout.
	  ○ **Student Leaders**: Balance leadership roles with personal and academic obligations, ensuring they meet group goals while maintaining individual success.
	  ○ **Future Careers**: Succeed in professional environments where managing multiple tasks, meeting deadlines, and making informed decisions are key to productivity, growth, and work-life balance.

	• Developing these skills early sets the foundation for long-term personal and professional success.
Duration	**Eisenhower Matrix**
5 min GUIDE MATCH: Page 44	• We are going to review and practice utilizing the Eisenhower Matrix, also known as the Urgent-Important Matrix, as a tool for prioritization. ASK: Is anyone familiar with the Eisenhower Matrix and would like to describe it to the group? EISENHOWER MATRIX OVERVIEW: • The Eisenhower Matrix helps categorize tasks based on urgency and importance. • Many of us tend to focus on urgent tasks, but the goal is to also pay attention to the important ones that help us in the long term. • Urgent tasks need immediate attention, but not all are important. • Important tasks contribute to long-term goals. • The four quadrants of the Eisenhower Matrix include: 1. Urgent and Important 2. Not Urgent but Important 3. Urgent but Not Important 4. Not Urgent and Not Important
Duration	**Eisenhower Matrix Activity**

15 min
 	
GUIDE MATCH:
Page 45
	INSTRUCTIONS:
	• Divide participants into small groups (2-3 people).
	• Each group receives a scenario where they are given a list of tasks that need to be completed within a week. Some tasks will be urgent, others important, and some less so. Their challenge is to prioritize them using the Eisenhower Matrix.
	• Give the groups 5 minutes to discuss and fill out their matrix.
	• After the time is up, ask each group to share their top 3 priorities and explain their reasoning.
	
	DEBRIEF:
	• Discuss the outcomes of the activity.
	  ○ What criteria or factors did you consider as you were categorizing tasks?
	  ○ Did your personal values or preferences sway your decision? If so, how?

	○ How could utilizing this prioritization method help you make decisions and manage your time as a chapter leader? ○ What challenges do you foresee facing? ○ Who could you delegate tasks to and how could you use the matrix to decide which tasks to delegate? TAKEAWAYS: • Highlight that everyone's prioritization may look different based on individual goals and circumstances. • Emphasize the importance of focusing on Quadrant 2 (Not Urgent but Important) tasks for long-term success. Correlate these to items they may have put on their strategic plan/SMARTIE goals list earlier.

Enhancing Team Morale and Engagement

Setting: Large Group
Duration: 30 minutes
Start Time: 3:10 pm
End Time: 3:40 pm

Overview

Moving team members forward requires leaders to create environments that understand and support different preferred workstyles and needs. Doing so inspires self-motivation within team members and collectively moves the team toward organizational priorities. To do this, leaders may need insights on how to initiate, institutionalize, and sustain positive behaviors and enhance team morale. 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 to properly motivate.

Unless you're in the military, 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 improved member engagement and correlates with professional environments.

Objectives

- Learn the difference between Motivating and Incentivizing
- Learn the four different work styles and how people prefer to work
- Brainstorm how to inspire self-motivation within members based on work style

Activities and Items Needed

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

Room Setup

- Theater style

AV/Tech Needs

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

Content

Duration	Introduction

10 min
 	
GUIDE MATCH:
Pages 47
	• Draw connections between successful teams, strategic planning, and prioritization to the concepts of enhancing team morale and engagement.
	• Team members are more engaged and feel self-motivated to accomplish work when they work in environments that understand and support their preferred work styles and needs. Each individual's preferred work styles are different.
	• A good leader always takes account of the personality of individuals, collective dynamics, organizational priorities and self-awareness to stabilize, move and lead a group of people.
	• If these things aren't taken into account, you are likely experiencing low morale and lack of engagement.
	
	INCENTIVIZING:
	• 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 when we are positively rewarded.
	• Being positively rewarded is defined on a scale by these two polar opposite perspectives:
	  ○ A way to measure personal performances and assurance of personal advancement
	  ○ 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.
	
	ASK:
	• In what ways do you currently incentivize chapter members?
	• Are those methods working?
	• If so, why do you think so?
	• If not, why do you think that is?

BIRKMAN REPORT REFERENCE: How to Incentivize Me Report	ASK: Look at your How to Incentivize Me report. What are some incentives that prompt you, personally, to do something? MOTIVATING: • Moving team members forward requires insights on how to initiate, **institutionalize**, and sustain positive behaviors.

	• Consider motivation to be the process of encouraging people to do what *they* want to do (that might also happen to correspond with what you want them to do).
	• The goal and challenge as a leader will be to create an environment and establish a culture that supports and encourages self-motivation in your chapter members and fellow leaders.
	• Remember that the culture of your chapter correlates with your values, history, and customs. It's the consistent, lived experience of members.
	• This could look like:
	  ○ Chapter Examples:
	  ▪ creating chapter-sponsored case-study teams to inspire professional development
	  ▪ instating chapter-wide study tables to encourage good academic standards
	  ▪ creating a reward system for the member that raises the most philanthropic dollars to enhance the desire of support the community through philanthropic endeavors
	  ○ Career Examples:
	  ▪ Collaborating with employees on the creation of a professional development action plan
	  ▪ Offering flexibility in work hours and environment that fits with work style preferences, life style priorities, and productivity levels
	  ▪ Establishing a rewards system that encourages self-motivated improvement like badging and certification programs that correlate with opportunities for promotion and/or salary increases
	• Motivation is more than just the reward for an action—it is creating a culture that supports members in the achievement of their goals.

BIRKMAN REPORT REFERENCE: How to Motivate Me Report	ASK: Reference your How to Motivate Me report. • How are you personally motivated? • How do you motivate people within your chapter? • Are you considering the different ways personality types might be motivated? • What differences are you noticing between incentives and motivations of people?

Duration	Organizational Focus

15 min
 	
GUIDE MATCH:
Page 48
	• The challenge is to create and institutionalize a work environment and culture that support both individual and collective self-motivation.
	• Each personality type (Birkman Color) can also be used to describe work styles.
	• In the same way that individuals have personal preferences, our members and colleagues each have a preference for the environment in which they prefer to work.
	• Understanding these styles can help you create environments in which your team can be successful and self-motivated.
	• Providing opportunities for people to work in environments that they enjoy, doing the type of work that they prefer the higher likelihood members and your fellow leaders are engaged in the work.
	
	BLUE WORK STYLE PREFERENCES: (Design/Strategy)
	• Blues are motivated by:
	  ○ A work environment that emphasizes planning, innovating, and creating
	  ○ A culture of ideas, usually with a strong strategic focus
	
	GREEN WORK STYLE PREFERENCES: (Sales/Marketing)
	• Greens are motivated by:
	  ○ A work environment that emphasizes selling, promoting, directing, and motivating others
	  ○ A communication-based culture designed to influence others
	
	RED WORK STYLE PREFERENCES: (Operations/Technology)
	• Reds are motivated by:
	  ○ 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 WORK STYLE PREFERENCES: (Admin/Fiscal)
	• Yellows are motivated by:
	  ○ 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.

	ASK: Reference your organizational focus report. Move to the corner of the room that matches your bottom/longest bar. Discuss the following questions with others around you. • How does your work style inform what you already know about how you like to work? • What are your biggest pet-peeves within this work style? • What is most productive for you in this work style? • What happens when you are forced to work outside of this style?
Duration	**Summary**

5 min	• Make connections between how leaders consider the difference between what THEY need to feel motivated to what OTHERS might need—especially if it's different from them.
	• 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.
	• Inspiring self-motivation is a more sustainable practice, but it requires that you learn about your team.
	• Creating systems that allow for multiple working styles is a good start.
	• We've even seen the trend over the past couple of years both within education and professional settings, administrators and employers being more flexible with work schedules and environments to promote productivity and satisfaction within their teams.
	• At a chapter level this could be achieved in numerous ways:
	  ○ Chapter Officer Roles and Responsibilities:
	  ▪ Understanding Work Styles: Encourage chapter officers to assess their own work styles and those of their committee members. This awareness can guide task delegation and communication strategies to optimize productivity and satisfaction.
	  ▪ Flexible Leadership: Chapter Presidents and other chapter officers can create a culture of flexibility, recognizing that different members have varying work preferences. Offer choices whenever possible (e.g., project assignments, meeting times) to accommodate individual needs.
	  ○ Committee Work and Projects:
	  ▪ Tailored Task Assignments: Committee Chairs can leverage knowledge of individual work styles to

	delegate tasks that align with members' strengths and preferences. ▪ Open Communication: Foster an environment where committee members feel comfortable expressing their work style preferences and any challenges they face in group settings. ▪ Customized Feedback: Committee Chairs can offer feedback and recognition in ways that resonate with individual members, boosting motivation and performance. o Chapter Meetings and Events: ▪ Diverse Formats: Incorporate various meeting formats (e.g., brainstorming sessions, structured agendas, informal discussions) to cater to different work styles and preferences. ▪ Clear Expectations: Provide clear agendas and expectations in advance, allowing members to prepare and contribute effectively based on their work style. ▪ Inclusive Participation: Encourage all members to contribute actively, recognizing that participation may look different for individuals with diverse work styles. o Recruitment and Member Engagement: ▪ Attracting Diverse Talent: Showcase the Fraternity's commitment to understanding and supporting different work styles during recruitment efforts, appealing to a broader range of potential members. ▪ Personalized Onboarding: Tailor the onboarding process to individual needs, ensuring new members feel welcomed and supported as they integrate into the chapter. ▪ Ongoing Engagement: Continuously assess and adapt chapter activities and programs to ensure they remain inclusive and engaging for members with diverse work styles. The next session will help participants put this into practice.

Enhancing Team Morale and Engagement

Setting: Small Group
Duration: 50 minutes
Start Time: 4:05 pm
End Time: 4:55 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 life scenarios, both within the chapter experience and the business world. 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 four different personality types, work styles
- Apply work style considerations to business design

Activities and Items Needed

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

Room Setup

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

AV/Tech Needs

- None

Content

Duration	Introduction
5 min GUIDE MATCH: Page 48	• 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 and in your chapter experience. ASK: • 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. ○ Not everyone likes to work in the same way. ○ Many students (and adults) assume that everyone views the world (and work) the way they do, which is not the case. • How does your preferred personality type, 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 who is a Planner (Blue Interest) and Organizer (Red Org Focus) would prefer to do Blue things in a Red way. • Looking back on the Collaborative Model, what similarities and new ideas can you draw between the model and the concept of work styles? ○ Look for participants to connect specific types of tasks with specific work styles.
Duration	**Business Design Based on Workstyle**
10 min GUIDE MATCH: Page 49	• Businesses vary greatly on a number of areas, including but not limited to: ○ Physical layout of the office ○ Company culture ○ Leadership style ○ Management style ○ Benefit offerings ○ Nature of the job ○ Ownership structure • Even among these areas, businesses and leadership have the ability and responsibility to consider options and adaptations to the needs of the business, but also the needs and preferred workstyles of team members. • Doing so creates an environment in which team members are more engaged in the work they do and they people they work with. Overall, morale is positive because leadership finds ways to motivate team to do what they (the team member) want, while achieving the goals of the leader/business. • This same ideology can be applied to the chapter and member experience. ASK: • What are some examples of different ways a work environment may be physically laid out? • How could this be applied to the chapter experience?

	○ Career Examples: ▪ Cube farm ▪ Open concept ▪ Halls and offices ▪ remote home office or co-working space ○ Chapter Examples: ▪ classroom rows ▪ sitting in a circle ▪ sitting at separate tables (banquet style) ▪ reception ASK: • Can you think of different types of philosophies or approaches to company culture? • How could this be applied to the chapter experience? ○ Career Examples: ▪ 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 ○ Chapter Examples: ▪ Chapter as a family ▪ Purpose driven ASK: • What kinds of leadership styles might impact a business? • What about leadership styles within the chapter? ○ Career Examples: ▪ Member of the team, hands-on ▪ Ivory tower ▪ Emotional ▪ Decision-making process • Top-down vs. Consensus • The concept of accountability is key ○ Chapter Examples: ▪ Very similar to career examples ASK: • Similarly, what kind of management styles may impact the business? • How does that translate to the chapter experience?

	○ Career Examples: ▪ Delegative ▪ Micro-managerial ○ Chapter Examples: ▪ Utilization of committees for delegating tasks ▪ Empowerment others vs. Dictating to others ASK: • Benefit offerings vary, what difference in benefits can you think of? • How does this translate to the chapter experience? ○ Career Examples: ▪ Work/life balance ▪ Flexible schedules ▪ Work from home ▪ Compensation scheme ○ Chapter Examples: ▪ Flexible attendance policy ▪ Reward programs ▪ Variety of events ASK: The actual job itself can vary based on need or industry. • What examples of difference can you think of regarding the nature of the job? • How does this correlate to the chapter experience? ○ Career Examples: ▪ Lots of travel ▪ 9 to 5; Predictable ▪ Flexible ▪ Project-based ▪ Standard, repeating tasks ○ Chapter Example: ▪ Potential member, active member, chapter leader, alumni member experiences ▪ Highly involved vs. Minimum expectations
Duration	**Business Portfolio Activity**
20 min	INSTRUCTIONS: • Break participants into workstyle (color)-groups based on their organizational fit/work style color (their bottom bar). If there is only one of a color, pair reds with yellows and blues with greens. • 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:
	  ○ A specific business function
	  ○ A reporting structure
	  ○ An office layout/floor plan (to be drawn on flip chart paper)
	  ○ 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).
	
	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.
	
	ASK:
	• 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/office setup 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?

Duration	**Group Design Activity**
15 min	• 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. • Similarly, it is unlikely that your chapter is made up of members with one type of preferred workstyle. • As a leader, it's important to be able to motivate people in all types of work styles.

	INSTRUCTIONS:
	• Now, the larger group will collectively combine/create a new business portfolio that can accommodate all four work styles, but considering the chapter experience. Use the following questions to prompt their thinking:
	  ○ Which chapter operations/functions are represented by which work style, and how can all of them co-exist in the same chapter?
	  ○ What chapter operations/processes can be tweaked to motivate the most members?
	  ○ How can physical space be manipulated to motivate chapter members, leaders, and advisors and/or alumni?
	  ○ How can a meeting be structured to suit the needs of all involved?
	
	Write/draw their answers on a piece of flip chart paper.
	
	DEBRIEF:
	• Without knowing the organizational fit of people in your chapter or future company, how can you tell what might motivate them in an organization?
	  ○ Look for answers that include observing the behavior of others.
	  ○ Are they someone who needs lots of time to think and likes to talk about broad ideas, or are they someone who likes to work with their hands and just get things done? [Blue vs. Red]
	  ○ Are they someone who is always social, or are they a bit quieter and prefer to work alone? [Green vs. Yellow])
	• Based on your experience with this exercise, how is motivation different from incentives?
	  ○ In this exercise, they practiced building a system that supports what others need [motivation], whereas incentives are overlaid on top of systems and don't necessarily require any knowledge of someone's needs.
	• How do you think you can use this in your chapter? Your future career?
	
	SUMMARY:
	• People are unique and have unique needs.
	• Consider your team's personalities 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 engage and enhance morale for people like yourself. You understand yourself.

	• You need to learn how to engage and enhance morale for people differently than you because that will encompass 75% of the world.

10-Minute Break

Navigating Crucial Conversations

Setting: Small Group
Duration: 40 minutes
Start Time: 5:05 pm
End Time: 5:45 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. Although the focus of this session is on practicing effective communication skills to navigate difficult conversations, adjusting to personality types can be brought in through questioning and discussion throughout or at the end of the session.

Objectives

- Identify and learn to manage individual stress and fears about conflict
- Learn about the needs and stress of others in conflict
- Practice having difficult conversations
- Demonstrate knowledge of (Birkman) Stress Behaviors and how to acknowledge them in a conversation
- Use effective communication skills for structuring difficult conversations

Activities & Items Needed

- Handling Conflict Report

Room Setup

- Chairs in a circle

AV/Tech Needs

- None

Content

Duration	Introduction
5 min GUIDE MATCH: Page 50	• Having that crucial conversation during difficult situations always seems to be troublesome. • We may sometimes tend to become argumentative, emotional, passive aggressive, or just avoid getting to the heart of the matter.

	• The primary reason for the worry related to navigating a difficult conversation is that we do not know what or how the conversation will play out.
	• Navigating difficult conversations requires us 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.

Duration	**Discussion of Fears**
5 min GUIDE MATCH: Page 51

Duration	Overcoming Fear of Conflict
10 min GUIDE MATCH: Page 52	• 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. • **Conflict is a dance of collaboration.** It's an opportunity to explore different perspectives, discover common ground, and co-create solutions that lead to mutual growth and shared success. Flexibility and open communication are key steps in this dance.
BIRKMAN REPORT REFERENCE: Handling Conflict Report	ASK: Reference your Handling Conflict report from Birkman and read through it. • 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?
GUIDE MATCH: Page 52	• There are things that each of us can do to help manage conflict. • Review what Birkman shares about how each personality type can best manage conflict and confront their fears related to conflict. SUMMARY: • Difficult conversations are, well, difficult. • Approach difficult conversations in a manner that considers the **Needs** of the individual to help limit their **Stress**. • 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 these factors are influenced by your Usual and Stress behaviors because you could be in either one during the conversation. • During Presidents' Academy we conveniently know each other's Birkman colors to help us to identify personality types, as well as their Usual behavior, Stress behaviors, and Needs. • Outside of Presidents' Academy, remember that by taking the time to ask the right questions and through attentive observation to get to know the people you interact with will help you determine each person's needs and therefore limit stress.

Duration	Types of Difficult Conversations

5 min	ASK:
	• 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 personality types might have played into it?
	• What are you hoping to learn or practice today to make these conversations easier?

Duration	**Strategies for Effective Communication**
5 min GUIDE MATCH: Page 53	• Communicating effectively during a conflict generally, includes clarifying the problem, connecting to understand their side of the story, collaborating to come to an understanding, and committing to a joint solution. • Difficult conversations should allow room for both voices to be heard, and the 4 Cs for Crucial Conversations help to ensure that's the case. • It's important to note that these same steps for approaching a conversation with a peer like a chapter member, fellow chapter leader, classmate should be applied to conversations had with authoritative figures. • While there are added layers of power dynamics related to managing up, these strategies for navigating crucial conversations are equally as effective when utilized with superiors. THE 4 CS OF CRUCIAL CONVERSATIONS: 1. Clarify: • Prepare: Take a moment to collect your thoughts. Consider the person, the situation, and the desired outcome. • Define: Clearly state the issue at hand. Use "I" statements to express your perspective and the impact on others. • Listen: Encourage the other person to share their side of the story. Listen actively and empathetically. 2. Connect: • Find Common Ground: Seek mutual understanding of the problem. Acknowledge their perspective and find areas of agreement. 3. Collaborate: • Brainstorm: Work together to find a mutually agreeable solution. Ask for their input and ideas.

	4. Commit: • Agree on the Solution: Gain clear agreement on the solution and next steps. • Follow Up: Set a time to check in on how the solution is working and make any necessary adjustments.
Duration	**Fishbowl Activity**

10 min
 	
GUIDE MATCH:
Page 54
	• The Fishbowl Activity utilizes the list of types of conversations participants would like to practice.
	• The purpose of this Fishbowl is for participants to see the steps of a difficult conversation being used, and how it works.
	
	INSTRUCTIONS:
	• Give participants 10 min. to practice in pairs.
	• Choose conversation topics that apply to difficult conversations they may need to have.
	• 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 four 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.
	
	DEBRIEF:
	• How did your individual conversations go?
	• What was it like to use specific tactics to guide your conversation?
	• Think back to what we know about people's different personalities (Birkman colors). How might those differences change your conversations?
	• How will you have to adjust your approach to work with different personalities?
	• What business situations might you find yourself in that would require a difficult conversation?
	• How might being in a business situation change the conversation?
	• How might the conversation change if the other person is truly in stress mode?

	SUMMARY: • 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.

Leading Meetings that Matter

Setting: Small Group
Duration: 60 minutes
Start Time: 7:15 pm
End Time: 8:15 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. This session equips participants with practical skills and strategies to facilitate effective and engaging meetings, transforming them from mundane gatherings into productive collaborations. These skills will aid in both leading your chapter, a project team in school, and business units.

Objectives

- Learn meeting and agenda-specific facilitation techniques
- Practice creating meeting agendas that include facilitation best practices
- Define facilitation and its behavioral anchors
- Practice facilitating in small groups

Activities and Items Needed

- Accompanying worksheet
- Facilitation prompts for participants to practice
- Sticky notes

Room Setup

- Chairs in a circle

AV/Tech Needs

- None

Content

Duration	Introduction
5 min GUIDE MATCH: Page 59	• 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 crucial conversations for authentic, collective commitment. • Only then, can accountability be achieved. • Creating buy-in is key. You can create buy-in utilizing facilitation skills.

	ASK: • What have been some of your most frustrating meeting experiences? • What makes a meeting dreadful? • Why are well-facilitated meetings crucial for teams? • What are some key benefits of effective meeting facilitation? OVERVIEW: • Briefly introduce the goals of the workshop and set expectations. (Model facilitation skills you want to see others take away from this session.)
Duration	**Facilitation Fundamentals**

20 min
 	
GUIDE MATCH:
Page 60
	KEY CONCEPTS:
	• Facilitation can be broken down into three key concepts; head, hands, heart.
	• Utilizing the "Head, Hands, Hearts" approach to ensures your facilitating an effective meeting because it clarifies purpose, there are tangible outcomes from that meeting, and overall, it's a positive emotional experience.
	  ○ **Head: We know why we're here**
	  ▪ agenda creation helps with this and open the meeting with IDOARRT as well
	  ○ **Hands: We move things forward**
	  ▪ the execution of the agenda
	  ○ **Heart: We feel accomplished with the meeting by the end**
	  ▪ creating a safe space for people to share and where they feel respected helps make people want to attend the next meeting and fully participate
	
	FACILITATOR ROLE:
	• The Facilitator as a Guide, not the Expert
	• The "3 Cs" of Facilitation: Clarity, Control, and Collaboration
	
	MASTER THE MEETING:
	The 3 Cs of Facilitator Success
	
	1. CLARITY:
	  ○ Set the Stage:
	  ▪ Shared Understanding: Co-create the agenda with the group and ensure everyone understands the purpose and desired outcomes of the meeting.
	  ▪ Clear Expectations: Establish ground rules for respectful communication and active participation.

	▪ Focused Agenda: Define clear objectives for each agenda item, keeping the discussion focused and productive. 2. CONTROL: o Guide the Process: ▪ Time Management: Keep the meeting on schedule and ensure all agenda items are addressed. ▪ Manage Participation: Encourage everyone to contribute, while gently managing dominant personalities and ensuring quieter voices are heard. ▪ Stay on Track: Keep the discussion focused on the topic at hand, using a "parking lot" for off-topic ideas. ▪ Decision-Making: Guide the group to make clear and informed decisions, avoiding getting bogged down in details. 3. COLLABORATION: o Foster Teamwork: ▪ Active Listening: Encourage active listening and create an environment where everyone feels heard and respected. ▪ Build Consensus: Facilitate open discussion and help the group reach agreement on key issues. ▪ Empowerment: Encourage participants to take ownership of the meeting and its outcomes. ▪ Action Plan: Secure specific commitments and assign ownership for follow-up tasks. ROLES WITHIN A MEETING: • The facilitator should not bear the brunt of the work of all these roles when facilitating a meeting. Rotate roles each meeting (or series of meetings) to give different people a chance to add their talents to these roles. o Minute taker (takes notes during the meeting and shares afterwards) o Timekeeper (responsible for making sure the meeting runs on time) o Door keeper (greeter welcoming participants) o Tech host (assisting with tech needs if applicable) o Other possible roles based on needs
Duration	**Agenda Creation**
10 min GUIDE MATCH: Page 61	• Introduce the IDOARRT (I Do Art) acronym as a tool for crafting agendas that ensure clarity and participation. o Intention: What is the purpose of the meeting? In other words, why have it? o Desired Outcomes: What specific outcomes should be achieved by the end of the meeting?

GUIDE MATCH: Page 61	○ Agenda: What activities will the group go through, in what order to move toward the desired outcome? ○ Roles and Responsibilities: What roles and responsibilities need to be in place for the meeting to run smoothly? Who is facilitating, note taking, timekeeper, door greeter, tech guru, etc.? ○ Rules: What guidelines will be in place during the meeting? ○ Time: What is the expected time for the meeting, including breaks, and at what time will the meeting end? INSTRUCTIONS: • Divide participants into small groups to develop a sample agenda for a chapter meeting using IDOARRT. • Have groups post their agendas around the room. • Provide participants with sticky notes and have them walk around the room, providing constructive feedback on each agenda. DEBRIEF: • 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 feedback that you received was most helpful? Why? • How might you need to adapt your facilitation techniques to accommodate the multiple personality types you will be leading?
Duration	**Meeting Role Play**
20 min GUIDE MATCH: Page 64	INSTRUCTIONS: • Assign different facilitation roles (moderator, timekeeper, minute-taker) and have participants practice facilitating a mini-meeting from one of the prompts provided in the participant workbook. • Take 5-7 minutes to role-play each scenario before moving on to another prompt.
Duration	**Summary**
5 min	DEBRIEF: • What are your personal takeaways from this session and the meeting role-play activity? • How do you plan to apply these skills in their next meeting?

	MEMORABLE ACRONYM
	• Introduce the acronym "**LEAD**" to encapsulate key facilitation principles:
	  ○ **L**isten Actively
	  ○ **E**ngage Everyone
	  ○ **A**genda with Purpose
	  ○ **D**ecisions and Action

Saturday Facilitator Huddle

Duration: 40 minutes
Start Time: 8:20 pm
End Time: 9:00 pm

Record your questions and notes here.

Building a Legacy: Bringing it Back to Your Chapter

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

Overview

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

Objectives

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

Activities and Items Needed

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

Room Setup

- Chairs in a circle

AV/Tech Needs

- None

Content

Duration	Introduction

5 min
 	
GUIDE MATCH:
Page 65
	ASK:
	• What do you feel your chapter needs the most from you as a leader?
	• What will you focus your leadership efforts on once you return to your chapter?
	• What challenges do you think you'll face?
	• How has this weekend helped prepare you to lead?
	
	OVERVIEW:
	• Focus on what you, as Chapter President and leader of your chapter, needs to do.
	• To do this, we'll:
	  ○ Develop a Leadership Action Plan
	  ○ Share with peers for feedback
	  ○ Assign accountability buddies

Duration	**Develop Action Plan**
10 min GUIDE MATCH: Page 66	REFLECTION QUESTIONS • What are the first steps you need to take when you return to campus after Presidents' Academy? • How will you get to know your team better in order to leverage their strengths? • What crucial conversations do you need to have and with who? • Do you need to adjust your facilitation style? If so, how? • What do you need to do to develop and/or implement a strategic plan? • What support will you need? From who?
Duration	**Partner Share and Feedback**
15 min GUIDE MATCH: Page 67	INSTRUCTIONS: • Have participants pair up (or in groups of three) and share their plans. • Explain that the partner(s) they select for this pair and share activity will serve as their Peer Coach(es) following Presidents' Academy to provide support and hold their partners accountable. • Peer Coaches should listen and offer feedback to help strengthen their partners' action plan. • Encourage pairs to exchange contact information with their partner. • Schedule a Peer Coaching call a few weeks out to follow up with each other on progress and offer support. • Encourage participants to follow up with your accountability buddy monthly. • If time allows, the facilitator may ask them to share one or two action plan items with the full group, but the essence of this is establishing a Peer Coach for the remainder of the semester/term. PEER COACH CONSIDERATIONS: • What is the outcome, impact, or change you want to bring about? What would total success look like? Short of total success, what is the most important result you desire? • How clear are the action steps? Do they follow the SMARTIE format? How well do they set you up to bring about the desired outcomes?

	• What context, information, or resources might you need before taking action? Where or with whom does that information reside? What is your plan to get that information? • What barriers or challenges do you anticipate? How will you minimize or overcome them? • Might you benefit from practicing or rehearsing a planned interaction, perhaps with someone who can provide feedback? What will you do to create that opportunity? • How can the Chapter Advisor, District Director, Assistant District Director, Regional Vice President, or Central Office staff support you? • What can I as your Peer Coach offer to assist you? [This is a great opportunity for each officer to practice assessing their strengths and the needs of their partners based on personality types.] WRAP UP: • One of the first action steps you take would be to share your action plans with your executive committee, Chapter Advisor, District Director, Assistant District Director, and Regional Vice President. • Utilize these folks as a resource and as a means of accountability for yourself and your chapter. All of these folks want to see and help you succeed. • Collect Action Plans. Distribute cards with QR code and ask each attendee to submit the outcome, impact or change they plan to take back to their chapter.
Duration	**Parking Lot**
5 min	• Spend time reviewing outstanding parking lot items. • What is still outstanding that they'd like to cover? What still needs to be returned to? • If any parking lot items are individualized vs a group item, those individuals can be connected with other leaders, staff, appropriate resources.
Duration	**Weekend Debrief**
10 min	ASK: • What are some of your key takeaways and commitments from this weekend? • Which session(s) was (were) most useful to you? • Which session(s) was (were) least effective or least helpful for you? • What was your favorite part of the weekend?

	• What would you have liked to see more of? • Would you recommend Presidents' Academy to others?
Duration	**Survey Completion**
5 min GUIDE MATCH: Page 72	**This is a PRIORITY item to be done during this small group session!** • Ask all to go scan the QR code and complete the online survey. • Explain they will receive follow up a few months post Presidents' Academy.
Duration	**Final Thoughts**
10 min	• Small Group Facilitators take a moment to say goodbye. • Remind them that contact information for everyone at the program will be made available to them very soon. • Students may want to say goodbye to one another, take photos, etc.

Call to Action and Farewell

Setting: Large Group
Duration: 45 minutes
Start Time: 10:15 am
End Time: 11:00 am

Overview

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

Objectives

- Provide a conclusion to the program
- Inspire the participants
- Share gratitude for weekend facilitators

Activities and Items Needed

- Slide deck

Room Setup

- Theater style

AV/Tech Needs

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

Content

Duration	Introduction
25 min	• Open with an introduction of the individual and a brief summary of their experience with Deltasig and Presidents' Academy. • As leaders of your respective chapters, you are part of a very select group of individuals. You're not just students. You're not just members. You're leaders. You're visionaries. You're the driving force behind your chapters and the future of Delta Sigma Pi. THE UNIQUE CHALLENGE OF LEADERSHIP:

	• Leadership is never an easy path. It’s not just about having the title of President; it's about taking that title and giving it meaning through action, compassion, and vision.
	• The role you have taken on is demanding. You are tasked with balancing academics, personal growth, and leading a group of diverse individuals—all while working toward the collective goals of your chapter.
	• That is no small feat. But remember, true leadership is forged through challenge.
	• Throughout Presidents’ Academy, you have gained tools, insights and skills to develop you as a leader within your chapter and future career.
	• The real journey begins now—outside of this room, where the stakes are real and where you will face trials that may sometimes feel overwhelming.
	• Leadership, after all, is not a destination but a process. It’s a series of moments when you step forward, sometimes into the unknown, sometimes against the tide, to do what is right and not just what is easy.
	
	CALL TO ACTION:
	• I want to challenge you to elevate not just yourself, but the entire community around you. Here’s your call to action:
	  ○ **Lead with Purpose**:
	  ▪ Purpose-driven leadership creates lasting change. Define the “why” for your chapter.
	  ▪ Why does our Fraternity exist? Why do your members show up? Why are you the President? When the “why” is clear, the “how” becomes evident.
	  ▪ Connect this back to the Purpose and Principles and the Strategic Planning sessions
	  ○ **Empower Your Members**:
	  ▪ Great leadership isn’t about doing everything yourself—it’s about developing and empowering others.
	  ▪ Create opportunities for your members to lead.
	  ▪ Recognize their potential and invest in their growth.
	  ▪ The true legacy of a leader is in the leaders they create.
	  ▪ Connect this back to the Enhancing Engagement and Morale session.
	  ○ **Foster Collaboration and Inclusion**:
	  ▪ Leadership today is about collaboration, not command.
	  ▪ You are at the helm of a chapter that brings together different talents, perspectives, and backgrounds.

	▪ Use that diversity to build something greater than the sum of its parts. ▪ Make your chapter a place where every member feels valued, where innovation thrives because everyone's voice is heard. ▪ Connect this back to the Purpose and Principles, Building Successful Teams, and Enhancing Engagement and Moral sessions. ○ **Innovate and Take Risks**: ▪ In today's ever-changing world, leadership is also about staying ahead of the curve. ▪ Challenge the status quo. Encourage your chapter to think outside the box. It's easy to stay comfortable with "what has always been done," but true progress happens when you take calculated risks. ▪ Be bold in your vision and fearless in its execution. ▪ Connect this back to the Purpose and Principles and Strategic Planning Sessions. ○ **Leave a Legacy**: ▪ Your term as President is finite, but the impact you make will last much longer. ▪ What will people remember about your leadership? What kind of chapter will you leave behind? ▪ Begin with the end in mind, and think about the legacy you want to build. ▪ Set your chapter on a course that not only achieves immediate success but also creates a lasting foundation for future generations. ▪ Connect this back to the Action Plans they made during their last small group session. BUILDING A LEGACY BEYOND YOUR CHAPTER: • The skills you're developing now go far beyond the walls of your chapter. • These are the skills that will shape your future career, your relationships, and your contributions to society. • Your role within your chapter is a training ground for further developing your leadership skills, for the influence you will wield in the business world, and for the lives you will touch along the way. • You stand at the crossroads of opportunity. You can choose to coast through this experience, checking off boxes and meeting basic expectations, or you can seize this moment to make an extraordinary difference. I challenge you to choose the latter.

	FINAL THOUGHTS • Leadership is a privilege, not a position. It is an opportunity to serve, to uplift, and to inspire. Each of you has the power to lead with purpose, to empower others, and to create lasting change—not just within your chapter, but in the world beyond. • Go forward with courage. Lead with intention. And leave a legacy that will inspire those who come after you. • Thank you, and I wish you all the best on this journey of leadership and growth. • The future of your chapter, your community, and even the business world is brighter because of your leadership.
Duration	**Participant Salutation**

10 min	• Introduce the chosen participant to give a salutation to their peers
	• Participant to share their thoughts to the following prompts in their address
	  ○ If this is a returner, how did attending the Presidents' Academy impact the execution of their leadership role? Why did they decide to return?
	  ○ What are their "ah-ha" moments or key takeaways from this experience?
	  ○ What connections have they made during Presidents' Academy and how do they intend to maintain and utilize those relationships following Presidents' Academy?
	  ○ What did they learn about themselves and how they work with others that they intend to keep in mind and inform decision-making?

Duration	**Farewell**
10 min	Closing Remarks by Grand President, Paul Carpinella. • Pass out facilitator acknowledgments and thank yous • Mention the Delta Sigma Pi Presidents' Academy Participant LinkedIn Certification

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.

NOTES

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