

HOW-TO GUIDE

# CHAPTER LEADERSHIP RETREAT

This guide provides guidelines for chapters seeking to hold a leadership retreat as an orientation for new leaders. Keep in mind that the Executive Committee of the chapter (president, vice president or president-elect, secretary, treasurer) should meet on their own prior to a larger chapter leader leadership retreat.

## **Orientation for Chapter Leaders**

To start the year off strong, we encourage chapters to hold a retreat for their incoming leaders. The retreat can help your chapter set goals for the year and build a strong team. Below is a suggested outline for the retreat with some resources to assist you in planning the event. At the end of the guide are templates your chapter can use to get started.

<b>Opening exercises</b>
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### **Introduction**

Begin the retreat by having attendees introduce themselves. You can be creative with introductions and incorporate an ice breaker to get them engaged.

### **Review ASDA's mission statement and vision**

A mission statement defines who or what an organization is and the vision describes what we want to be.

*ASDA's mission statement: The American Student Dental Association is a national student-run organization that protects and advances the rights, interests and welfare of dental students. It introduces students to lifelong involvement in organized dentistry and provides services, information, education, representation and advocacy.*

*ASDA's vision: To advance the dental profession by developing exemplary leaders and inspiring member advocacy.*

It is important to emphasize that ASDA is a national organization working on behalf of 22,000 dental students nationwide. Many incoming students tend to confuse it with local school organizations. Also, make sure people are familiar with the term advocacy as this is the backbone of our organization and what we do. Advocacy is defined as an individual or group that aims to influence public policy. As students you advocate on behalf of your patients, your profession and your student body on a local, state and national level.

### **Chapter Bylaws**

All chapter leaders should be familiar with the chapter's bylaws. The chapter bylaws should be easily accessible, and the chapter Secretary is responsible for keeping track of the bylaws.

### **Create a chapter vision and a strategic plan**

The Executive Committee of the chapter may need to meet separately and prior to a larger chapter leadership retreat to solidify the chapter vision and strategic plan. A strategic plan serves as a road map to reach your vision. ASDA's board of trustees develops national ASDA's strategic plan and it runs on a three-year cycle. This allows the organization to set short- and

long-term goals. Each year, the new board evaluates the progress and makes changes as necessary to reach our goals.

A strategic plan does not have to be complex. Start with a few simple goals and set a timeline when you will re-evaluate or edit your plan. This allows focus in your organization and will create a path to bettering your chapter and overall involvement. Each chapter objective from here on out should contribute to your strategic plan in some way even if minimal.

Consider providing the vision and strategic plan to those in attendance at the Leadership Retreat prior to the event. Ask the leaders in attendance to think of goals based on the strategic plan. For example, the chapter's strategic plan could include a focus on building positive relationships with school administration. Each committee chair could then have a goal to support that initiative in the strategic plan. For example, each committee chair could have a goal of inviting at least three administrators to each event. Another goal could be for the Secretary to create a report that each committee chair must complete. The Secretary then uses the information to summarize the work the chapter is doing on a monthly basis and provides the information to the Chapter President who may have a goal of meeting with the Dean of Student Affairs every month. [See goals for more information.]

### **Planning the Budget**

First, you will need to talk to the previous year's officers to find out the status of your finances. Determine if there is money in a chapter bank account, how much and if there is outstanding revenue to be collected or expenses to be paid.

The next step will be to determine the activities for the year and the associated costs. Items such as lunch and learns, social events, attendance at national events and donations to charitable organizations should be included.

You will want to look at the funds your chapter has and determine the amount of money needed to cover the activities. Revenue can come from local dues, fundraising and corporate sponsorship. Use sample [budget spreadsheets](#).

It will be important as an Executive Committee to understand the budget prior to a Leadership Retreat with chapter leaders beyond the Executive Committee so you can speak to what is financially feasible.

### **ASDA Organizational Structure**

To provide an overview of ASDA's structure and how chapters fit in, you can refer to ASDA's [organizational chart](#).

### **Goal Setting**

Using the goals that you developed in your chapter's strategic plan, come up with goals for each leader. Work with outgoing leaders to define what their goals were for the year and the progress they made. Get their ideas for the newly elected leaders. The new leaders should

come up with a minimum of three goals and how they are going to achieve them over the course of the year (cost, sponsors needed, contacts, etc.). Make and distribute short transition packets to the leaders to help guide them in their new position.

### **Personal Leadership Development**

We suggest that you incorporate a presentation on some type of personal leadership skill, such as public speaking, conflict management or networking to benefit your chapter's leaders. You can invite an outside speaker to present, such as a faculty member or a leader in the local state dental society, or offer someone within your chapter the opportunity to present on a skill they excel in. Plan a leadership development workshop that is more interactive with your group. This can include activities that help you learn about your own leadership style as well as your new team.

### **Words from you Advisor**

Invite your chapter advisor to attend to welcome the group and talk about how they can serve as a resource for the board during the year. This would also be a good opportunity to introduce any relevant administrative personnel to the group.

### **Writing for ASDA**

Encourage chapter leaders to write for your chapter newsletter, district newsletter or the national publication Contour. Being published can promote your chapter on a national level as well as provide professional experience for members to add to their CV.

Use the retreat to brainstorm what your school or chapter does well or is unique that would make a good article. The chapter newsletter editor can provide guidelines for writing for the newsletter. The editor should come up with several ideas for articles and ask people to write those as well as encourage members to write unique stories. Consider adding a requirement that each board member should contribute to the newsletter.

Inform members of the opportunities to write for the district newsletter and national ASDA. Gather information from the district newsletter editor or trustee to share. Explain the difference between the various national publications and review the [guidelines](#). Provide the contact information for the editorial board if members want more information.

### **Guidelines for Travel**

Review with the board the guidelines for travelling to national and district events. Ask your chapter treasurer to assist you in putting together this information.

Discuss how the board will determine who is funded to attend. It is important to assess this carefully and include all that deserve to go. It is understandable if you have a large board and cannot afford to bring everyone, but aside from the elected board, those who attend the most

ASDA events or are the most involved should be positively rewarded to attend events. If you have a small chapter, you may want to bring other members who have shown interest in leadership.

Review the costs that will be covered by the chapter. This can depend on the size of the chapter, the amount of funds given by the school or student government, and the amount of funds raised from sponsors or fundraising events. Typically, travel and lodging should be covered to encourage members to attend. If ample funds are raised, it is nice to cover the cost of food and other travel expenses.

If not all costs can be covered, then cover a portion of costs and divide the remaining equally among the attending individuals. You may also be able to supplement costs by requesting funds from your dean, student government association or your state society.

Review the paperwork that needs to be completed to travel to events. For example, some chapters require attendees to write an article for the chapter newsletter or give a presentation on the event they attended. Your administration may also require documentation of the event to excuse an absence from school.

Remind chapter leaders that when they travel to district and national events, professional conduct is mandatory at all times. You do not want something negative to be reported to your dean. Most important is to emphasize that they represent the American Student Dental Association and over 22,000 student members nationwide.

## Chapter Resources

ASDA has developed the following resources for chapters that you may want to share with your officers during the retreat. Display ASDA's website on the screen and link to the following resources:

- [How-to guides](#): Best practices and tips gathered from other chapters on fundraising, organizing vendor fairs, recruiting predentals, community service events, creating chapter websites and much more.
- Find membership recruitment materials, template presentations, logos, financial and legal information through ASDA's [Chapter Management Resources](#) page.

### Strategic Plan Worksheet for Chapters

Category	Goals	Steps Needed to Accomplish Goals	Deadline
Membership	1) 2) 3)		
Fundraising	1) 2) 3)		
Communications (website, newsletter, video, social media)	1) 2) 3)		
Legislative issues and advocacy	1) 2) 3)		
Predental recruitment/ involvement	1) 2) 3)		
Community service	1) 2) 3)		
Activities (health/wellness, social, educational)	1) 2) 3)		

What categories does your ASDA chapter lack in? Why?

What categories does your ASDA chapter do well in? Why?

Did you learn anything from this project?

**Example Leadership Retreat**  
**[DATE]**

9 am – 9:30 am	<b>Registration and Check-in</b> Continental Breakfast	Room A
9:30 am – 9:45 am 9:45 am- 10:30 am	<b>Introduction</b> <b>Keynote Speaker:</b> [NAME]	Room A
10:30 am- 10:45 am	Break	
10:45 am – 11:45 am	<b>Teambuilding Exercise: Rules and Teams</b> [NAME]	Room A - Intro South Patio Lawn -Activity
11:45 am- 12:30 pm	<b>Lunch</b>	
12:30 pm – 1:15 pm	<b><i>Breakout Sessions</i></b> <b>Breakout A: Finding your Core</b> [NAME] <b>Breakout B: Working with Indian Health Services</b> [NAME] <i>Sponsored by: Sponsor</i> <b>Breakout C: Post Graduate Private Practice Employment and Tips</b> [NAME] <i>Sponsored by: Sponsor</i>	Room A  Room B  Room C
1:15 pm- 1:30 pm	<b>Break</b>	
1:30pm – 2:15 pm	<b>Scavenger Hunt</b> Look for your team by (SHAPE) on your nametag	
2:15- 2:45 pm	<b>ASDA Trivia Contest!</b> (Individual Players)	
2:45 pm- 3:15 pm	<b>ASDA FEVER CONTEST</b>	
3:15 – 3: 45	<b>Raffle and Closing</b> [NAME]	