

HOW-TO GUIDE

CHAPTER LEADERSHIP RETREAT

Leadership retreats can be used by chapters in a variety of ways. They can help chapters set goals for the year and build a strong team of incoming leaders. Retreats can serve as a starting off point for any potential ASDA members to become involved in ASDA leadership in the future.

This guide provides guidelines and suggestions 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.

Opening exercises

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 is as follows: *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 is 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 23,000 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. We as students advocate on behalf of our patients, our profession and our 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 keep 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 guide 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 very 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 no fewer than three administration 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 all the work that 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 costs associated. 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 that will be 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 may or may not be financial 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 with 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.

Below is a sample outline for a presentation on networking:

- I. Introduction
 - A. Why good networking skills have helped him/her in different professional settings.
 - B. Networking is an important part of planning for your future.
 - C. The relationships you make now can last for years to come and help you in your career as a dentist.
 1. Give examples: finding an employer, getting referrals for your practice, seeking a position in organized dentistry and being a leader in your community.
- II. Networking tips
 - A. Have business cards and keep them on you at all times. Write an interesting detail about his or her personality or background so that you remember them. Reintroduce yourself no more than one week after your initial meeting.
 - B. Share your passion for dentistry/research/XYZ hobby. When you talk about something that is meaningful to you, it can be contagious. Before you know it, you've had a memorable encounter which is the foundation for a lasting relationship.
 - C. Don't start a conversation with a "what's in it for me?" mentality. Instead of thinking someone can help you out, try reaching out with curiosity. When engaging in conversation with someone, it is important to create value in the conversation. Be a value creator not a value seeker (always asking "what's in it for me?"). This allows you to start a unique, sustainable relationship that will benefit you further down the road in the future.

- D. Show up early. When you arrive at the beginning, you have more opportunity to talk to individuals present without feeling like you're lost in a sea of people. Additionally, this way once you meet new people you can connect them with colleagues or friends that arrive later.

III. Conversation Starters

- A. Smile. It may seem basic, but it's hard not to start a discussion or at least smile back.
- B. "Hi, my name is...." It can be intimidating to approach someone (or a group of people), but push yourself to walk over and introduce yourself. Look for groups of people standing in an open circle or with open body language because they are the easiest to approach. Also, if you are with friends or colleagues introduce them and engage them in the conversation as well. People are naturally more drawn to people that bring others together. Start with your name and follow it up with an easy-to-answer question like "How do you know the host?" or "What brings you here tonight?"
- C. "I love your [shoes/shirt/necktie]." You'd be surprised how quickly someone's guard can come down when you dish out a compliment. "That was an interesting presentation you just gave" or "That's one of my favorite books you're reading" can go a long way.
- D. "You look familiar." You run into each other at the library or coffee shop several times a week. Why not say hello?
- E. Bring up a timely topic. Talk about a book or movie that just came out or something big that's happening in the news. Try to avoid religion or politics.

IV. Demonstrations or show YouTube videos. For example, how to shake hands, how to start a conversation, and how to remember someone's name.

V. Practice your networking skills

- A. Apply for a chapter or national leadership position to meet people who share your passion for organized dentistry. There are more than 40 opportunities available each year to dental students of all ages.
- B. Attend national ASDA events to broaden your network outside your local dental school (this is especially useful if you're considering relocating or going into a specialty). Check out chapter or districts events to deepen the relationships with people at your school or district.
- C. Get involved at your state or local dental association. Many offer volunteer opportunities and host events for dental students to learn about practice management and working with patients.
- D. Meet other new dentists at the ADA's New Dentist Conference. This will connect you with dentists who were once in your shoes but also have experience you can learn from.

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 national publications, such as Contour or the ASDA blog. 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.

First, 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 showed interest in leadership.

Next, cover 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 the chapter leaders that when they travel to district and national events, professional conduct is mandatory at all times. The last thing you want is for something unbecoming to be

reported to your dean. Most important is to emphasize that they represent the American Student Dental Association and over 23,000 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	Registration and Check-in Continental Breakfast	Room A
9:30 am – 9: 45 am 9:45 am- 10:30 am	Introduction Keynote Speaker: [NAME]	Room A
10:30 am- 10:45 am	Break	
10:45 am – 11:45 am	Teambuilding Exercise: Rules and Teams [NAME]	Room A - Intro South Patio Lawn -Activity
11:45 am- 12:30 pm	Lunch	

12:30 pm – 1:15 pm	<p><u>Breakout Sessions</u></p> <p>Breakout A: Finding your Core [NAME]</p> <p>Breakout B: Working with Indian Health Services [NAME] <i>Sponsored by: Sponsor</i></p> <p>Breakout C: Post Graduate Private Practice Employment and Tips [NAME] <i>Sponsored by: Sponsor</i></p>	<p>Room A</p> <p>Room B</p> <p>Room C</p>
1:15 pm- 1:30 pm	Break	
1:30pm – 2:15 pm	<p>Scavenger Hunt Look for your team by (SHAPE) on your nametag</p>	
2:15- 2:45 pm	<p>ASDA Trivia Contest! (Individual Players)</p>	
2:45 pm- 3:15 pm	ASDA FEVER CONTEST	
3:15 – 3: 45	<p>Raffle and Closing [NAME]</p>	