

HOW-TO GUIDE

CHAPTER LEADERSHIP RETREATS

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. They can serve an introduction for potential ASDA members to learn about ASDA leadership opportunities in the future.

The first part of this guide provides guidelines and suggestions for chapters seeking to hold a leadership retreat as an orientation for new leaders. The second part addresses ways to hold a leadership retreat that is open to all ASDA members.

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. An easy and affordable option is to hold a Saturday meeting at the dental school for all chapter leaders. If your chapter can find a sponsor, you may be able to hold a weekend retreat somewhere outside of your city with all your chapter leaders. Traveling to a different location can lead to a more enjoyable experience, and allow for more networking time among leaders. Below is a suggested outline for the retreat with some resources to assist you in planning the event. There 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.

To set the stage for the retreat, play the video “[Make ASDA Part of Your Dental School Experience](#)” available on YouTube. This video features past ASDA leaders talking about what ASDA has done for them as a student and into their professional career. You can also highlight past and current chapter members that have made a lasting impact on your chapter.

Review ASDA’s mission statement and vision

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

ASDA’s mission statement is: 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 24,000 dental students. Many incoming students tend to confuse it with local school organizations. Make sure people are familiar with the term “advocacy.” 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 local, state and national levels.

Create a chapter vision and a strategic plan

To start the retreat, your chapter may want to create your own vision and strategic plan. A great source to get started is to review the [resources for national leaders](#). You can also use the strategic plan worksheet found at the end of this guide.

A strategic plan serves as a road map to reach your vision. ASDA’s Board of Trustees develops ASDA’s strategic plan 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 the 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 improving your chapter. Each chapter objective should contribute to your strategic plan in some way.

ASDA Organizational Structure

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

Encourage members to get involved both locally and nationally. There are many ways to encourage national involvement:

- Invite a current national leader or a previous national leader. If one cannot attend, plan a video conference via Skype, Google, Facetime, etc.
- Send interested members to a district meeting or an ASDA national conference.
- Visit ASDAnet.org/leadership and review the responsibilities of each position.
- If possible, plan a visit to ASDA's central office in Chicago.

Goal-Setting

Using the goals that you developed in your chapter's strategic plan, develop 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 develop a minimum of three goals and how they are going to achieve them over the course of the year (cost, sponsors needed, contacts, etc.).

Planning the Budget

The retreat is a good time for your chapter to plan its budget for the year. First, you will need to talk to the previous year's officers to determine the status of your finances. Confirm the 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 identify 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](#).

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. 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. [Download presentations](#) on public speaking and CV writing with presenter notes. 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.

If you choose to present on networking, you can [show a brief video](#) featuring former ASDA leaders followed by a more detailed presentation. Below is a sample outline for a presentation on networking:

- Introduction
 - Why good networking skills have helped in different professional settings.
 - Networking is an important part of planning for your future.
 - The relationships you make now can last for years to come and help you in your career as a dentist.
 - Give examples: finding an employer, getting referrals for your practice, seeking a position in organized dentistry and being a leader in your community.
- Networking tips
 - 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.
 - Share your passion for dentistry/research 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.
 - 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. This allows you to start a unique, sustainable relationship that will benefit you further down the road in the future.
 - 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 the crowd. Once you meet new people, you can connect them with colleagues or friends that arrive later.
- Conversation Starters
 - Smile. It may seem basic, but it's a great way to start.
 - "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. If you are with friends or colleagues, introduce them and engage them in the conversation. 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?"
 - "I love your [shoes/shirt/necktie]." You'd be surprised how quickly someone's guard can come down when you offer 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.
- "You look familiar." You run into each other at the library or coffee shop several times a week. Why not say hello?
 - Bring up a timely topic. Talk about a book or movie that just came out or something that's happening in the news. Try to avoid religion or politics.
 - Demonstrations or show YouTube videos:
 - [How to shake hands](#)
 - [How to start a conversation](#)
 - [How to remember someone's name](#)
 - [Be third at the table](#)
 - Practice your networking skills
 - Use ASDA's [online membership directory](#) to connect with people at other schools.
 - 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.
 - 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 district events to deepen the relationships with people at your school or district.
 - 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.
 - 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 your 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 [Mouthing Off 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 traveling 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.

Discuss 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. 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 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. Emphasize that they represent the American Student Dental Association and the 24,000 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.

[Chapter position-specific resources](#): Find a list resources and deadlines specific for each of the chapter positions, including president, treasurer, legislative liaison, membership chair, fundraising chair, wellness chair, preidental chair and communications chair.

[Chapter presentations](#): PowerPoint presentations on ASDA, preidental membership, public speaking, debt management, etc. that can be used at lunch and learns and chapter events.

[ASDA videos](#): Short videos on ASDA and getting involved, licensure, national events and leadership skills such as networking are available on ASDA's YouTube site. Use these videos at chapter events or share with members through emails.

[ASDA logos and templates](#): Download the ASDA logo and templates for letterhead, banners and PowerPoints.

[Online training presentations](#): Utilize leadership training PowerPoints on goal setting, strategic planning, ASDA organizational structure and mentorship during the retreat or events focused on recruiting new leaders.

[Gold Crown Award winners](#): Review past winners' applications, websites, blogs, videos and newsletters as reference when planning activities for the year.

[Chapter grants](#): Apply for grants throughout the year to earn additional funds for your chapter.

[Virtual events](#): Participate in ASDA's virtual events, such as Wellness Month, Preidental Month and Advocacy Month. Encourage leaders to plan activities during those months and utilize resources provided by national ASDA.

Retreat Guide for ASDA Members

One of the benefits of having a leadership retreat open to all members is that it can serve as a morale booster and can be an exciting opportunity for chapters to give members a “taste” of what national ASDA conferences are like. The following are suggestions for hosting a leadership retreat that is open to all dental students. The end of this guide contains a sample schedule for a leadership retreat.

Planning

A number of factors can help contribute to the marketing of your event. Factors such as the prospect of meeting fellow dental students from other schools, having a conference-like event off campus and obtaining CE credit can all make an event appealing to dental students.

Registration

Consider having registration costs at different tiers for attendees. Charge \$10 for ASDA members, \$20 for non-ASDA members and dental students from other schools, and \$30 for pre-dental students.

Venue

Consider using your school or state dental society’s headquarters to reduce costs. If you have sponsors you can host your retreat outside of your city.

PACE Credit

Work with your student AGD chapter to provide CE credit for each speaker presentation.

Leadership Slideshow

Display a PowerPoint of upcoming ASDA events, leader highlights, etc. on a loop to play during networking breaks.

Post-Retreat Evaluations

These can be paper copies to hand out at the end of the retreat or an online survey using Survey Monkey or a similar program sent out shortly after the event.

Speakers and Topics

Invite your chapter advisor and/or dean to attend the retreat and talk about the benefits of serving as a leader in organized dentistry.

We suggest that you incorporate a presentation on a personal leadership skill, such as public speaking, conflict management or networking. Other presentation topics can include practice management, personal development, stress management, and more. 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.

Encourage members to get involved both locally and nationally. Invite district and national leaders to attend the retreat and speak on their path to leadership and how to get involved.

Sponsorships

Solicit vendors and companies for sponsorships to help cover event costs. They can sponsor breakfast or lunch and provide brochures and promotional items to hand out to attendees. You can also have vendors put on a lunch and learn or sponsor a post-retreat dinner or happy hour as part of the sponsorship package. Sponsors can feature their name in the retreat program and announce their company during the retreat.

Additional Details

Nametags

Having nametags for each attendee can help encourage networking. Add leadership positions for ASDA leaders on their nametags.

Folders

Create folders with speaker bios, the agenda, upcoming ASDA events, as well as a description of chapter ASDA leadership positions for participants to refer to throughout the day.

Headshots

Consider offering professional headshots at the event. Have your chapter historian set up an area where attendees can get a headshot taken in case they want to apply for future leadership positions or write for an ASDA publication. The historian can later upload the photos to Dropbox or Flickr and give attendees access to the link via email after the event.

Raffle Prizes

To keep students engaged in the speaker presentations, ask the audience questions related to each topic after each presentation and hand out a prize for every correct answer. You can also have a networking game running throughout the day and award a prize for the attendee that does the best by the end of the retreat. Solicit vendors to donate any items to use as raffle prizes.

Social

Holding a social to end the day at your leadership retreat provides a great chance for your leaders to relax, have fun and network. Your team will grow by getting to know each other and having fun together. Make sure to keep the social professional and work with your sponsor to ensure the social is a success.

Strategic Plan Worksheet for Chapters

Category	<i>Goals</i>	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 do well in? Why?

What categories does your ASDA chapter need improvement? Why?

Did you learn anything from this project?

Leadership Retreat Schedule, Example 1

Marquette ASDA Leadership Retreat 2017

Saturday, June 3

8 a.m. - Breakfast in 194

8:30 a.m. - Leave Marquette for Madison

10 a.m. - Arrive in Madison

10:20 a.m. - Welcome

10:30 a.m. - WHY ASDA?

11:30 a.m. - Break

11:45 a.m. - ASDA Trivia- Who wants to win some ASDA SWAG?

12:15 p.m. - Lunch and Q&A with Aspen Dental

1:30 p.m. - Leadership Styles Workshop - Communication

2:30 p.m. – ZOOM Icebreaker

2:45 p.m. - Networking 101

3:15 p.m. - Group Photos & Headshots

6:35 p.m. - Madison Mallards Game (Gates Open 90 minutes prior to game time)

-Post Game Fireworks

-Game of Thrones Night

Sunday, June 4

8 a.m. - H&W Event

9 a.m. - Animal Sounds Icebreaker

9:10 a.m. - Tips and Tricks- Goal Setting

9:30 a.m. - Classify This! Icebreaker

9:45 a.m. - Committee Goals Breakout

10:45 a.m. - Break

11 a.m. - Committees Fulfilling Chapter Goals

12 p.m. - Closing Remarks

Leadership Retreat Schedule, Example 2

**ASDOH ASDA 3RD Annual Leadership Retreat
October 13, 2012**

9 – 9:30 a.m.	Registration and Check-in Continental Breakfast	Saguaro A
9:30 – 9: 45 a.m. 9:45 - 10:30 am	Introduction Keynote Speaker: Colleen Greene, ASDA President Harvard 2014 DMD MPH Candidate	Saguaro A
10:30 – 10:45 a.m.	Break	
10:45 – 11:45 a.m.	Teambuilding Exercise: Rules and Teams African River Crossing Mai-ly Duong – ASDOH ASDA Past President Lujayn ElKaiali – ASDOH D3 Vice President	Saguaro A - Intro South Patio Lawn -Activity
11:45 a.m. – 12:30 p.m.	Lunch	
12:30 – 1:15 p.m.	<u>Breakout Sessions</u> Breakout A: Finding your Core Ms. Gail Hendricks, RDH Breakout B: Working with Indian Health Services Dr. DezBaa Damon-Mallette <i>Sponsored by: Society of American Indian Dentists- ASDOH</i> Breakout C: Post Graduate Private Practice Employment and Tips Paula D. Aguayo, PLLC & Deb Roberge <i>Sponsored by: FirstDailyDental.com and Alpha Omega International Fraternity</i>	A: Cholla B: Mesquite C: Saguaro
1:15 – 1:30 p.m.	Break	
1:30 – 2:15 p.m.	Scavenger Hunt Look for your team by (SHAPE) on your nametag	
2:15 – 2:45 p.m.	ASDA Trivia Contest! (Individual Players)	
2:45 – 3:15 p.m.	ASDA FEVER CONTEST	
3:15 – 3: 45 p.m.	Raffle and Closing Onika Patel, ASDOH ASDA President	

Leadership Retreat Schedule, Example 3

Oklahoma ASDA Planning Meeting - August 24, 2013

- 8:30 – 9:00 a.m. **Registration/Breakfast**
- 9 – 9:30 a.m. **Welcome/Greetings by Daryn Lu, Oklahoma '15**
Greetings: Dean Randy Jones, OUCOD (5-10 mins)
Greetings: Dr. Michael Auld, ODA (5-10 mins)
Greetings: Amy Hall, SNB (5-10 mins)
Greetings: Terry Gilchrest, Patterson Dental
- 9:30 – 10 a.m. **"ASDA Fever" by Gabe Holdwick, Detroit Mercy '14**
ASDA's 2013-14 Speaker of the House will help introduce ASDA and the important role it plays in organized dentistry. Learn how to get more involved and how you can use national ASDA to your advantage this year!
- 10 – 10:15 a.m. **"Advocacy in Action" by Seth Brooks, Oklahoma '15**
ASDA's Chair for the Council on Advocacy will introduce you to the importance of ADPAC and how the future of the dental profession may be in jeopardy.
- 10:30 – 11 a.m. **"From Student Doctor to Real Doctor" by Ben Youel, DDS**
ASDA's past vice president will share his unique insight on lessons learned in the student clinic, avoiding burnout, and setting yourself up to hit the ground running after graduation.
- 11 – noon **"Network Like a Pro" by Gabe Holdwick & Ben Youel, DDS**
Does the word "networking" leave you with a sour taste? Is networking really all about who has the most Facebook friends? Join Gabe Holdwick and Dr. Ben Youel as they introduce basic concepts of building a professional network, finding a mentor, and why they are essential to your role as a dental student.
- Noon – 1:00 p.m. **Lunch/Officer Headshots (invite ODA officers)**
- 1 – 2 p.m. **"Go Team" by Gabe Holdwick, Detroit Mercy '14**
What is a committee? Why are committees important? How can a committee be successful? Gabe Holdwick and Dr. Ben Youel will lead OU ASDA's committees to new heights through an engaging workshop designed to strengthen your understanding of what a committee is capable of.
- 2 – 2:45 p.m. **Committee Breakout Session**
- 2:45 – 3:30 p.m. **Committee Reports**
- 3:30 – 4 p.m. **White Board Exercise / Group Photo**
- 7 – 10 p.m. **Cookout/Pool Party**