Welcome to the 2016 NAPA Retreat

Make a name tag & Please sit next to the person you interviewed ☺

Today's Agenda

- AM:
  - Introductions + Our Personal Why
  - Vision and Mission
  - 2016 Goals and Beyond
- LUNCH
- PM:
  - Our Individual and Collective Strengths
  - Engagement within and throughout NAPA
  - Roles
  - Processes
  - Wrap-Up

Today we commit to…

- be present
- listen intentionally – seek to understand
- speak courageously
- honor different styles
- respect confidentiality
- engage in healthy conflict
- adhere to the schedule and agenda
- Ask questions
- Be open to change
  - What else…?

Quick Connect

You have 3 minutes to…

- Connect with anyone you have not connected with in person yet – shake hands, hug, high-five, fist bump, eye contact, etc.
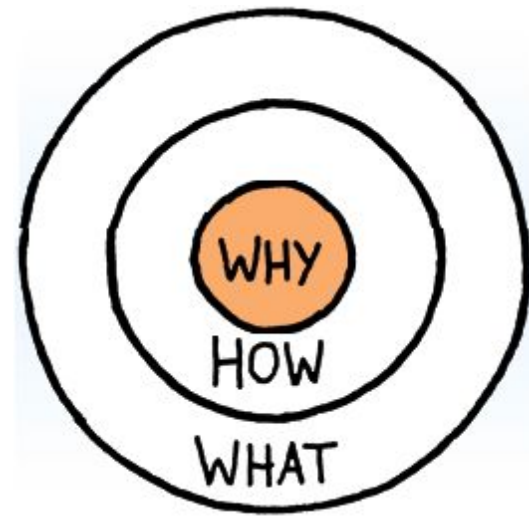
Introductions & Personal Why

Interviewer: Introduce the person you interviewed to the group:
    1. Name
    2. Role on board
    3. What stood out to you from your interview.

Interviewee:
1. Share anything additional you would like to about yourself.
2. What's your "why" related to NAPA?

SWITCH

Line Up!

Volunteer

Who would like to volunteer to help capture action items as we go through the day?

The role could switch at mid-day.

Capture person responsible and timeframes for each.

Definitions

Vision — Why are we here? What will it look like when we realize all of our hopes and ambitions?

Mission — What are going to do to realize that vision? What is our work?

Goals — What are the major 3-5 things we need to do in order fulfill our mission? (These should be "SMART" goals, lasting 1-3 years in duration)
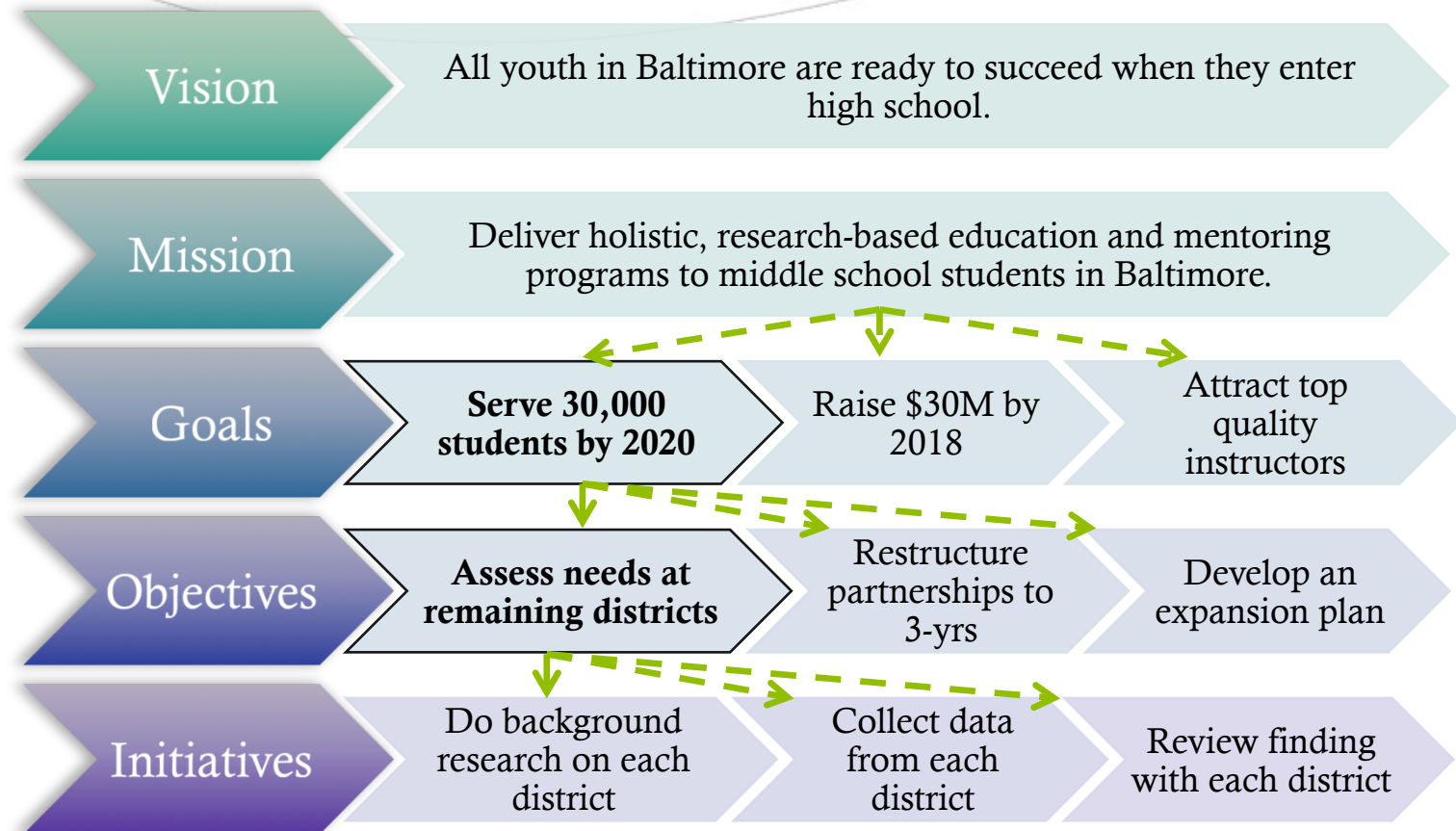
Objectives — For each goal, what are the major efforts or activities needed to accomplish it? (These should also be "SMART.")
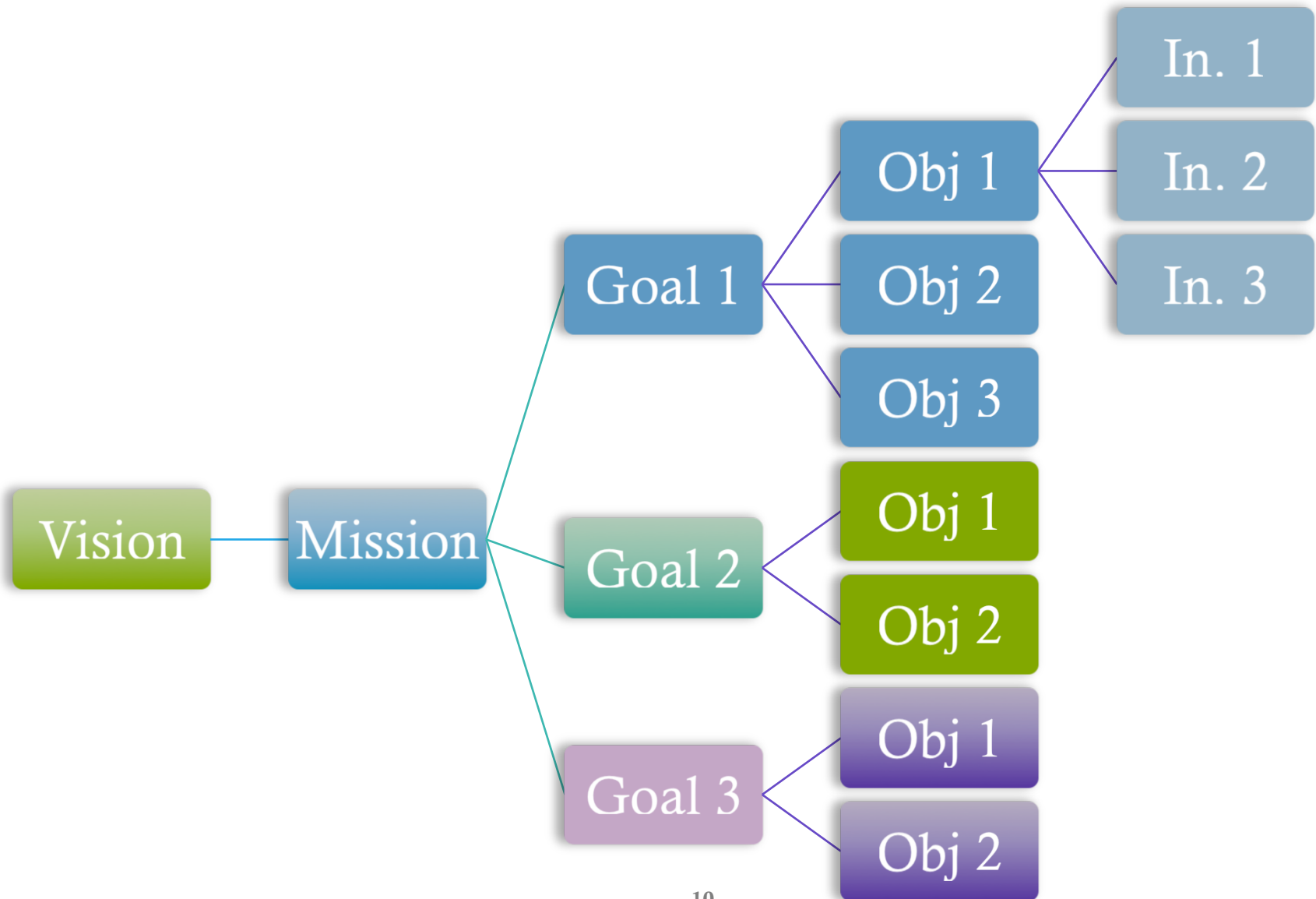
Initiatives — For each objective, what are the component initiatives needed to achieve it? (Also "SMART.")

Example

Vision
All youth in Baltimore are ready to succeed when they enter high school.

Mission
Deliver holistic, research-based education and mentoring programs to middle school students in Baltimore.

Goals
- **Serve 30,000 students by 2020**
- Raise $30M by 2018
- Attract top quality instructors

Objectives
- **Assess needs at remaining districts**
- Restructure partnerships to 3-yrs
- Develop an expansion plan

Initiatives
- Do background research on each district
- Collect data from each district
- Review finding with each district

Another view…

Vision & Mission

Vision Ideation

- Why is a vision important?

- For this activity, keep in mind:
  - We will gather your input (data) to the vision
  - A committee will develop a vision statement and bring it back to the group.
  - The purpose is to generate a quick list of what is most important.
  - This means not getting hung up on wording or creating a final product.

Vision Ideation

Think big picture. What are the core ideas?

♦ Take 5 minutes to reflect on and write down in <u>5 bullets or less</u>, what NAPA's vision should include. A guiding question: "What will it look like when NAPA realizes all of its aspirations?"

♦ Next, find a partner and come up with 5 bullets (max) based on each of your lists. You can even come up with all new bullets. (5 min)

♦ Next, join with another group (4 people total) and come up with a list of 5 (max). Write these down on a flip chart and share to the other groups. (10 min)

♦ Next step: Assign a lead for the committee to come up with a vision statement.

Mission

The National APIA Panhellenic Association serves to advocate the needs of its member organizations and provides a forum to share ideas and resources within its members. NAPA supports the development of positive relations through open communication with interfraternal partners to enrich the fraternal experience.

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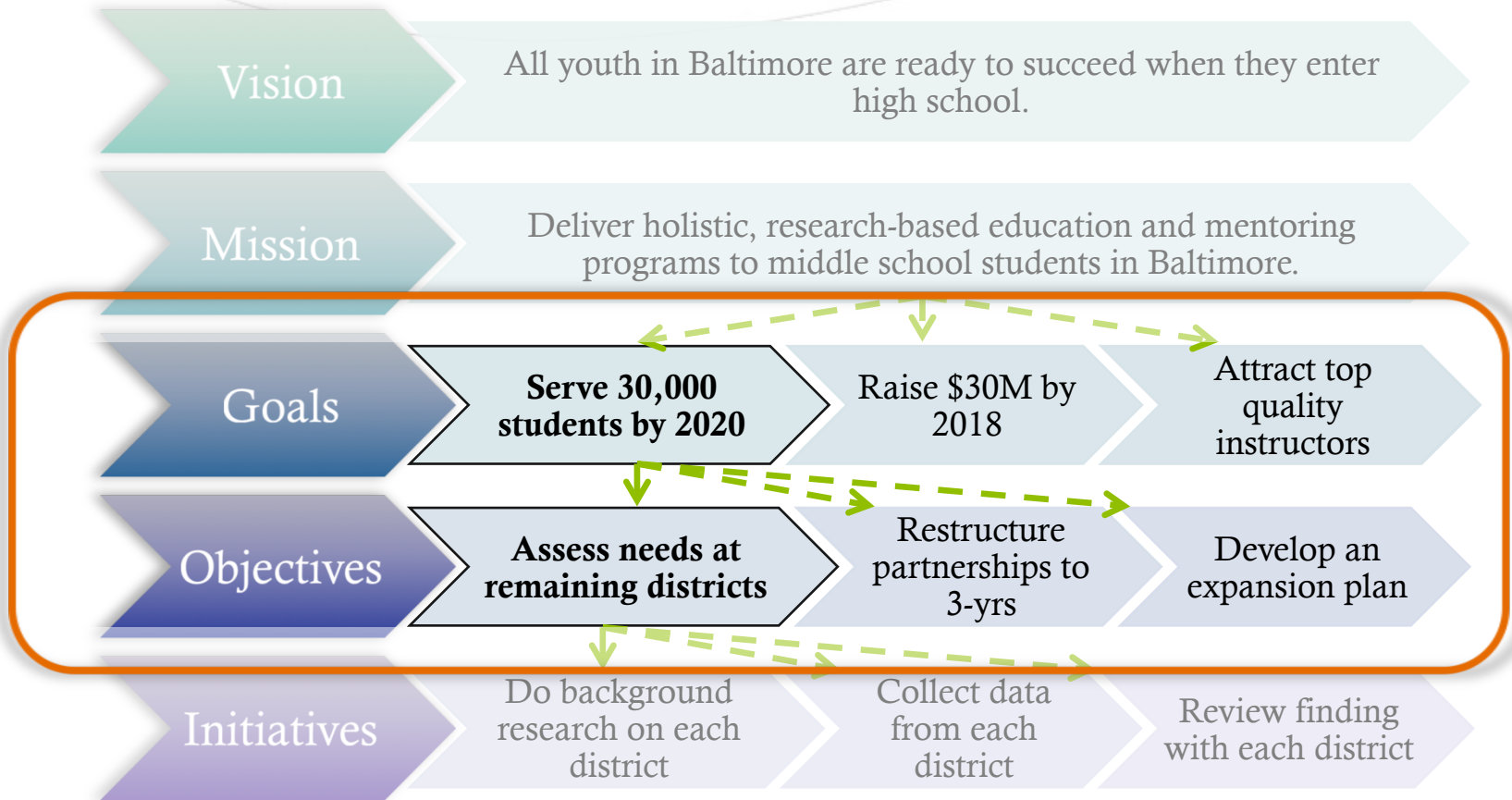
- Small Group Discussion:
  - What about NAPA's mission resonates with you?
  - Does NAPA's current mission capture all that NAPA does? If not, what is missing from NAPA's mission?

Goals and Objectives: 2016 and beyond

We will:

1. Define up to 5 goals and the supporting objectives for 2016.

2. Identify any goals or objectives that may be important but are to be done in 2017 and beyond.

3. Develop high-level plans to accomplish the goals and objectives.

Refresher

Vision	All youth in Baltimore are ready to succeed when they enter high school.
Mission	Deliver holistic, research-based education and mentoring programs to middle school students in Baltimore.
Goals	**Serve 30,000 students by 2020** · Raise $30M by 2018 · Attract top quality instructors
Objectives	**Assess needs at remaining districts** · Restructure partnerships to 3-yrs · Develop an expansion plan
Initiatives	Do background research on each district · Collect data from each district · Review finding with each district

Survey data in response to important NAPA Goals

- Inform members of NAPA's vision
- Inform public of what we do
- Build relationships with undergraduates
- Align NAPA mission to Greek AAPI community
- Engage members more
- Develop resources for members
- Ensure people know what NAPA is about
- Open communication between member orgs
- Regular teleconferences with each group
- Make NAPA calls more useful

- Update website
- Increase Revenue
- Display more NAPA unity
- Increase professionalism of NAPA
- Increase University and public involvement
- Improve relationships with umbrella orgs, interfraternal partners
- Attend more conferences
- Progress in at least one key area, e.g., Mental health

So, what are the goals? What are the themes?

Next Activities

- **<u>Individually</u>**: Think of the major goals and objectives that you see for NAPA for 2016, and any that you see falling into 2017 and beyond. See next slide for a template.

- **<u>In groups of 3</u>**: Create a combined list of the 2016 Goals and Objectives, and any for 2017+.

- **<u>Full group</u>**: Share each team's list and discuss to come up with final goals and objectives for 2016, and those that will be in 2017 and beyond.

A structure you can use

2016

Goal 1	Goal 2	Goal 3	Goal 4	Goal 5
Obj. 1	Obj. 1	Obj. 1	Obj. 1	Obj. 1
Obj. 2	Obj. 2	Obj. 2	Obj. 2	Obj. 2
Obj. 3	Obj. 3	Obj. 3	Obj. 3	Obj. 3

List of goals and objectives for 2017 and beyond
- Goal 1
- Obj 1

Recap on Goals

- Is anything important missing from 2016?

- Do the 2016 goals and objectives seem manageable?
  If not, what can be shifted into 2017? Or is there a way to get more support/resources to accomplish it?

Goal and Objective Planning

Next, we will:

- Start planning how we will approach the goals and objectives

- Identify key aspects like what success looks like, who will be responsible, resources needed, and risks around each area

- Identify the next steps and remaining questions that may need to be addressed tomorrow or in the future

Goal and Objective Planning

1. Find a goal area you'd like to work on
   1. Each goal should have at least 2 people and no more than 4 working on it

2. Each small group will have 20-25 minutes to planning objectives and initiatives around their goal.
   1. If you finish early, you can split up and support other groups.
   2. Document on chart paper.

3. Each group will present to the group for feedback.

Goal and Objective Planning

In your group, use flip charts to outline the following for the goal and its objectives.

Goal:

- What does success look like for this goal in 2016? (think "SMART")

Obj. 1, and for each objective

1. What success looks like for this objective:
2. Lead:
3. 3-5 key initiatives (activities/tasks) and milestones (when):
4. Resources/support needed:
5. Management: *How will reporting and tracking happen?*
6. Risks/challenges and mitigations:
7. Immediate next steps:

Recap

- Take a couple minutes to note the areas where you are the lead. This will guide your own work plans.

- Remember: objectives and initiatives can by dynamic. We tend to spend most of our time working at this level.

- Suggested next step:
  - Every NAPA board call: board provide updates on objectives and initiatives.
  - Every other month: EB conducts high level view on each goal and provides update at all NAPA call.

Our Individual & Collective Strengths

StrengthsQuest

- Positive Psychology

- Learning curves

- We all have these strengths but at varying degrees

- These strengths interact with one another

- Based on lived experiences, these strengths show up differently

One Key Question

- Part 1: What I Do Best
  - Choose 10 statements. Then, the 5 most important (in rank)

- Part 2: What I Need Most
  - Choose 5 statements and rank.
  - Can write in your own.

- Part 3: Share in small groups of 3. Story share.

Conflict…What Is That?

Conflict Defined

Conflict can be thought of as two or more ideas or desires trying to occupy the same space.

- In groups, there is always conflict, even if it is not visible.

- We each have a preferred style to deal with conflict.

- We can also choose to engage differently in different situations.

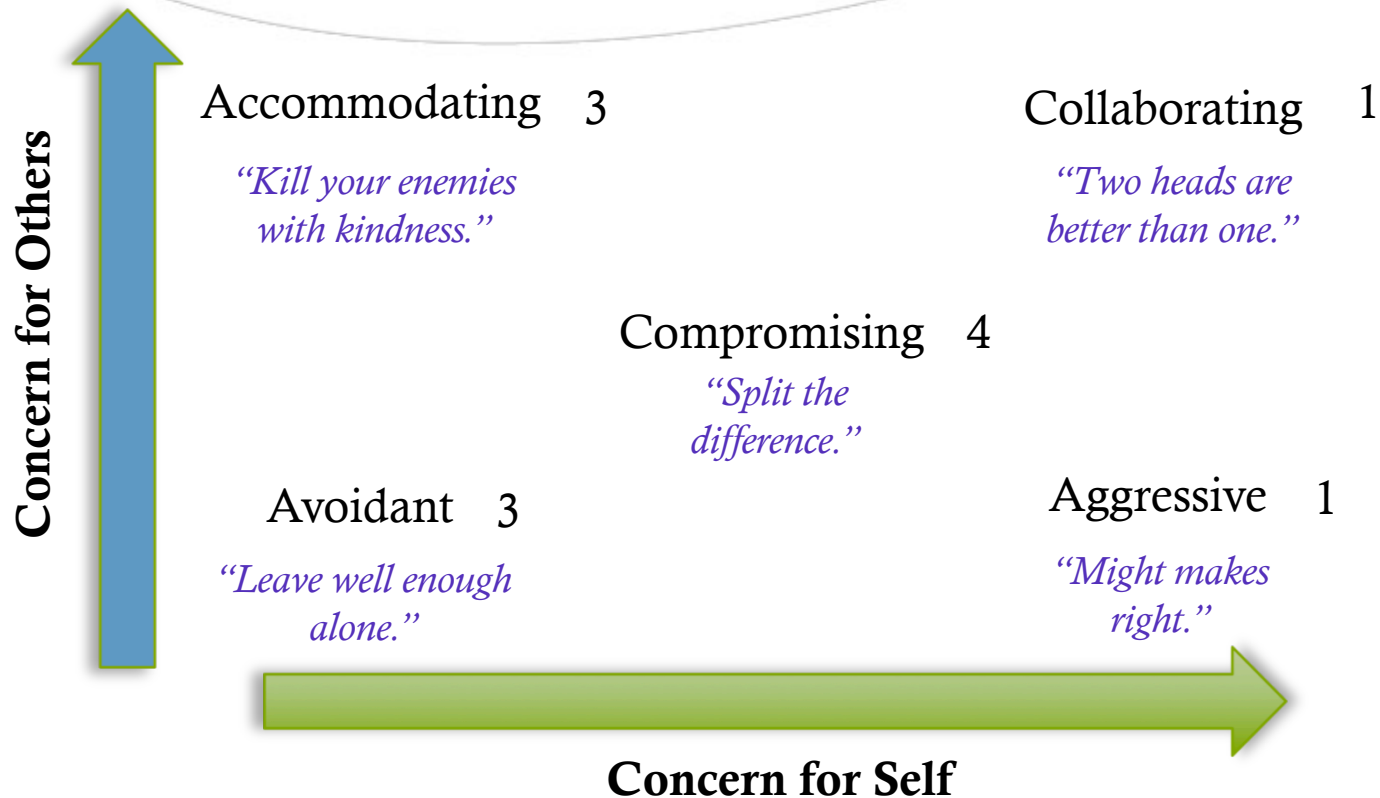- There is no "best way" to respond to conflict for every situation.

Discussion

⬧ How do you see conflict showing up in NAPA?

Conflict Modes

Being aware of conflict modes:

⬥ Helps with our self-awareness and self-management

⬥ Lets us see the conflict modes that others are using

⬥ Helps us choose the most effective conflict mode for the situation

Conflict Modes

Concern for Others (vertical axis)

Accommodating   3

"Kill your enemies with kindness."

Collaborating   1

"Two heads are better than one."

Compromising   4

"Split the difference."

Avoidant   3

"Leave well enough alone."

Aggressive   1

"Might makes right."

Concern for Self

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Thomas Kilmann Conflict Model

Discussion

⬥ When conflict arises in NAPA, how might you go about addressing it?

Roles

Role Discussion

Goals:

- Share more about your role to others

- Answer questions about your role

- Identify what you need from others and vice versa to succeed

Present and discuss your role

Take 5 minutes to jot down some ideas for the points below and we'll talk about each role.

1. My role:

2. Primary responsibilities:
    1. E.g., which goals/objectives I am working on

3. What I need from others to be successful:

4. Key things others need from me:

5. Other roles / committees I interface with the most:

6. Any questions about my role (that I have, or others)?

Engagement

Engagement

Goals:

- Discuss what a high-performing organization feels and looks like

- Discuss where NAPA has opportunity to improve

Engagement

◆ <u>Individually reflect:</u>
What does high-engagement look like for NAPA? (Internally and/or externally.) How could NAPA improve engagement?

Engagement

- <u>In groups of 3:</u>
  Discuss responses and come up with your key themes.
  Come up with a way to act out what high engagement looks like for NAPA. (5-6 min)

- Share your responses with the group.

Improving Engagement

What will we do to keep engagement high moving forward?

-
-
-
-

Processes

Processes

Process: How you communicate, collaborate, make decisions, and execute your work.

- Consider what processes we currently have. E.g., meetings, email, GroupMe, conference calls, etc.

- What's working well?

- What could be improved?

Processes Brainstorm

- Going well:
  - Calendar and email reminders associated with events on calendar
  - Agendas for call (sending it out beforehand)
  - Teriisthebomb.com
  - Note taking from larger scale meetings
  - How handled the expansion
  - Check-in with Vigor
  - Listing action items in meeting minutes, communicating those from EB

- Could be better:
  - **Google Drive organization (an initiative for Goal 4) (Hannah)**
  - **Clearly expansion process going forward (Prashant)**
  - Communication with UG member organizations (need a more direct way)
  - Communication between the board members – status updates, reporting procedure, and expectations (i.e. responding to emails)
  - Sending out meeting minutes immediately
  - **Responding to media inquiries (Angela)**
  - **Project management – moved from Trello to Google Keep (to be demo-ed tomorrow) (Teri)**
    - Hard to keep track of all of the moving pieces. Esp with deadlines (both set by selves and others)

Wrap Up

◆ Recap action items

◆ Please complete the post-retreat survey
  ◆ Sent out by Feb 1
  ◆ Will be due Feb 7

◆ Check-out

Check Out

- Check-out
  - One word for how you are feeling leaving today
  - Something that remains unclear to you
  - One thing you are looking forward to

Thanks

Thanks for a great day and all the hard work!

Contact Us:

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