**Alumni Leader Retreat Outline:**

**What is it? What is the purpose?**

An “off-site” gathering of alumni volunteers (4-5 hours on a Saturday), the “Alumni Leader Retreats” are designed to allow volunteers to bond and to create a common vision for their alumni community.

The workshop format utilizes design thinking techniques and curated exercises so that the alumni volunteers and club leaders are actively contributing though out. The goal is to launch a connected batch of club leaders (new or re-set existing ones), to brainstorm, and to create a mission for the club; leaving the board with a newfound connection among them and tactics to execute their vision.

**Why? What is gained?**

At the end of this workshop, club leader roles will be established as well as a cadence for leadership meetings. In some retreats, the club roles have already been defined, in others, leaders will emerge from the exercise. Consensus is built around a mission statement and yearly calendar planning.

**What does Alumni Relations do?**

Alumni relations sets the tone for the retreat and leads this interactive day of leadership programming. The venue is preferably a place that is fun, interesting, and sparks creativity and innovation (Peerspace has many options). Both breakfast and lunch are catered for the full day of activity. Alumni relations will also provide 3M flip charts, multi-colored post-its, markers, a “talking stick” to pass around, nametags, table tents to identify break-out group areas, and gift bags filled with Booth swag. Alumni relations regional manager will moderate and keep the group on schedule.

**Timeline and communications?**

Alumni should have this on their calendars 3-4 weeks in advance, and should be told to bring an item for “leader show and tell” (see below) and reminded the day before the event. Directions to the event location should be sent days prior and again hours before the event.

**Day of Agenda:** 10 am to 4 pm

- **10 am** Arrival, breakfast, introductions
- **11 am** Show & Tell, Exercise: re-creation of “that Booth feeling” in market
- **Noon** Working Lunch – Mission and Vision statement
  - Using post-its, team will write down words that evoke a vision of what they want their club to be and how they will serve their market.
  - Alumni relations will collect, collate, and group to create mission.
- **1 pm** Event planning brainstorm and calendar for the year
  - (break out into smaller groups if the group is large and have one representative from each report/present ideas)
- **2 pm** Working together: exploring and strengths and connections
  - (Super connectors, social media whizzes, moderators, corporate and multi-MBA liaisons, 2nd degree connections to speakers and venues).
- **3 pm** Assigning leader roles. Setting a cadence of leader meetings. Oath (optional).
- **4 pm** Conclusion, Next Steps, Distribute “Thank you” goodie bags with Booth swag.
Welcome:

- Remarks from Alumni Relations – reminder of the day’s purpose. Outline of agenda/exercises.
- Introductions, everyone please share:
  - Name, Program, Grad Year, Employer, and Job Title (with brief explanation, if need be).
  - How long you have lived in “X” city, and which neighborhood?
  - Why you moved to “X” city? Any kids? Pets? Hobbies?

Leader Show and Tell:

- Each of you should have brought an item with you today. (That was homework).
- “How does the item you brought, however symbolic, represent your experience at Booth?”
  - Exercise:
    - How can we re-create the Booth experience here in our “X-city” community?
    - Is there a brief announcement that you can craft as a group that board members and volunteers are able to repeat at the beginning of each event?
    - E.g. “when the board came together for this local club, we wanted to create a sense of…XXX for our local alumni…”

Mission and Vision Statement:

- Around the room are large 3M flips charts on easels and piles of colored post-its and markers. Each flip chart has a prompt, “Who are we? What are we? Why? How do we serve this community?
- On the post-its, write one, or a few words about what you’d like to see, or contribute towards, in a mission statement.
- After 40 minutes, AR manager collects post-its and rearranges them into common-themed buckets…. Visually, the group will see which words (concepts) are most important to them.

Event Planning Brainstorm:

- On the 3M Flip Charts, have a few prompts to get the group started:
  - E.g. Speaker ideas: pre-identify a few C-Suite alumni living in the market that they can strategize about asking to speak.
  - Venues of interest: each city has a few interesting or historical experiences that should get them thinking.
  - Sporting events: local teams playing Chicago teams?
  - Local Industry Focus: like LA has a media and entertainment angle or Seattle has aviation
  - Collaboration Opps: other B-schools? Incubator/accelerators, corporate partners?
- Have another page showing a calendar year and ask leaders to think about dates to avoid
  - Parents can tell you when big school milestones conflict on event calendars.
  - Having a visual calendar layout helps keep your leaders aware of over or under programming…also gives you an opportunity to remind them of appropriate lead times (6-8 weeks) and communications deadlines (Wed prior for weekly newsletters and weeks off for regional newsletters).
**Working Together:**

- **Skills and Connections:**
  - This is an opportunity to let your leaders recognize one another on any skills they’ve witnessed throughout the day.
    - E.g. “Let’s go around the room, everyone mention another leader in this room, and a discovery you made about them today that exemplifies their potential to contribute to the club and its programming”
  - They can also discuss industry expertise that has revealed itself and might lead to engaging events where a board member could moderate.
    - “Let’s talk about our shared knowledge represented by the industries and backgrounds in this room....how can we leverage this skills, talents, and thoughts among us to start creating community?”

**Assigning Roles, Leader Meetings and Oath:**

- Take a break between the last exercise and this one. Connect with the emerging/existing leader to get agreement on which strengths and expertise best suited for board structure.
- From the last exercise, alumni relations should have a pretty clear view of what roles can be assigned to which board members. Work in tandem with the emerging or existing leader to ask each person if they are willing to commit to a specific role.
- Announce leaders meetings (next date), location, and frequency. Set participation expectations.
- Get acknowledgment from each board member that they agree to meet those expectations. You can ask them to sign or verbally take an oath (optional).

**Next steps:**

- Next steps (follow up email with a Google Shared Drive info on all leaders and decisions).
- Thank you’s and goodie bags.