



# **2025 LEADERSHIP RETREAT**

*JANUARY 10, 2025*

Sheraton Suites Old Town Alexandria

801 NORTH SAINT ASAPH STREET,

ALEXANDRIA, VIRGINIA, USA, 22314

**PRESENTED BY GENEROUS DONORS TO THE PSI UPSILON FOUNDATION**

## **INTRODUCTION & OBJECTIVES:**

This workshop day is a launching point for self-discovery, skills development, and further engagement with the facilitators and coaches recruited from our broad network. Our hope is that participants leave brimming with ideas, useful contacts, and questions for further consideration. By design we have both cohorts of the past two years and a good number of brothers who have been part of the program leadership; we will have good conversation and a critical mass of attendees.

There are many hands that have made this program possible from donors, committee members, staff, contractors, and of course, the fellows and facilitators whose ambitions and promise drives us to provide a day of fellowship and activities. Please ENJOY and don't hold back - as the adage goes - "you get out what you put in"!

## **HOUSE RULES & NOTES:**

Be open minded and say YES; we have selected facilitators with broad experience and asked them to present on topics that should have broad cross-application.

The Foundation and Social Impact Fellowship aims to support our brothers striving for social excellence, however they personally define it; we ask everyone remain collegial and brotherly even should they find themselves working for different sides of causes they are passionate about.

The day will move quickly and we will be monitoring time closely. Please excuse moments when we must interrupt conversations for the sake of covering all that we have planned for the day.

## **PROGRAM AGENDA:**

10:30 AM	Registration Opens, Coffee
11:00 AM	<u>Welcome Brothers</u> Intro Slideshow - Foundation President <i>Alexander Senchak, Eta '06</i> Cohort Intros / Opening Remarks
11:30 AM	<b>Marketing your Mission and Soliciting Engagement</b> <i>Kenneth S. Ball, Eta '82 (Lehigh)</i>
12:30 PM	Lunch & Welcome <u>Psi U Doxology</u>
1:30 PM	<b>Utilizing Boards and Advisors</b> <i>Alex Senchak, Eta '06 (Lehigh)</i>
2:30 PM	<b>Break</b> Optional, elevator pitch workshop with Jonathan Chaffin, GT'00 ( <i>Georgia Tech</i> )
3:00 PM	<b>Inclusive Leadership: Leading Beyond Bias</b> <i>Devon Trotter CPCC, ACC, Phi Beta '06 (William and Mary)</i>
4:15 PM	<b>Leadership and Team Building Throughout Your Career</b> <i>Capt. Jimmy T. King (Ret.d) Phi Delta '97 (Mary Washington)</i>
5:15 PM -	<b>Stop to reset for reception</b>
6:20 PM	Group Pictures
6:30 PM	<b>Reception</b>

## **ABOUT THE SESSIONS**

### **Marketing your Mission and Soliciting Engagement**

**Kenneth S. Ball, Eta '82 (Lehigh)**

The ability to locate, propose and obtain buy-in is essential for many organizations. This session will focus on the practical and conceptual aspects that are critical to soliciting engagement and buy in from stakeholders. Ken has a wealth of experience in presenting an idea for implementation and buy-in, and will also discuss appropriate followup, stewardship, and re-application.

### **Utilizing Boards and Advisors**

**Alex Senchak, Eta '06 (Lehigh)**

Every successful organization requires a high-functioning board, and most successful leaders have a formal or informal network of advisors. Beyond governance responsibilities, they can provide invaluable objective feedback and perspective “beyond the bubble” of the organization. However, many, if not most, organizations and leaders do not meaningfully engage and leverage these groups. In this session, we will explore how to construct your advisory network and set time, talent and treasure goals for the board or advisors - whichever is relevant. We will also workshop easy tactics to engage the network in your workflow.

In preparation, write down your 10-15 closest advisors and board members that you currently have and 3-5 aspirational advisors you would want to have in your network.

### **(Optional) Organizational Representation/Pitch Practical**

**Jonathan Chaffin, Gamma Tau '00 (Georgia Tech)**

The importance of the Elevator pitch, the ability to make a concise explanation of what you are doing and how you want the listener to help, is crucial in all walks of life. Combined with picking your opportunities for networking and leveraging your organizational and personal successes, needs, and clout, a good pitch can make strong partnerships out of chance contacts.

Engage fast, be memorable, and leave the listener with enthusiasm and a call to action. Simple in concept, yet complex in execution. Jonathan will provide some guidance and best practices, and interested Fellows can practice with him.

In preparation, please reflect on key moments in your life career when you leveraged a chance encounter for personal or organizational impact.

## **Leadership and Team Building Throughout Your Career**

**Capt. James “Jimmy” T. King (ret.d) Phi Delta ‘97 (Mary Washington)**

Employing a successful leadership approach at any organization requires understanding the fundamentals of team building and the ability to exist and adapt within a unique workplace culture. Leadership approaches that work for one organization may fail at another. When determining what type of leadership style is most effective at a new or changing organization or within a changing field, it’s vital to listen more than you speak, challenge your own assumptions, and learn what that organization’s industry values.

Leadership isn’t just about ‘directing people,’ it’s about a productive feedback loop, building trust and meaningful relationships, and continuing to grow your skills in your field as a trusted expert. In this session, we will discuss some of the lessons learned from a career as a naval aviator and how these lessons both apply and contrast with leading - and participating on - teams in industry.

Requested pre-work: This session is intended to be a discussion; we learn more from a diverse set of opinions and questions than from hearing someone talk, so please come prepared with questions about leadership challenges you’ve faced or teambuilding in general.

## **Inclusive Leadership: Leading Beyond Bias**

**Devon Trotter CPCC, ACC, Phi Beta ’06 (William and Mary)**

This session aims to provide leaders with the skills and mindset needed to foster a deeper understanding of their role in promoting inclusivity and practical tools to lead diverse teams effectively. We will define inclusive leadership and emphasize its importance in creating high-performing, innovative, and collaborative environments. We will explore key traits of inclusive leaders, such as understanding power and privilege, empathy, cultural intelligence, accountability, and the ability to manage bias.

## **Saturday Programming**

### **Breakfast with the Archons**

### **Personal Birkman Assessment and Analysis**

In 1951, Dr. Roger W. Birkman created The Birkman Method to measure personality characteristics that influence behaviors, motivations, and perceptions. This unique tool is used to help YOU be the most effective leader YOU can be. Some of our programming on Friday will be walking you through your personal results and some things to consider when working with others. This tool and analysis are measured to your personal answers.

For this programming to be effective you must complete the online Assessment prior to the academy. We ask that everyone take 30 minutes to do this BEFORE TUESDAY JANUARY 2<sup>nd</sup>

## **FACILITATORS & SPEAKERS**

### **Alex Senchak, Eta '06 (Lehigh)**

Alex is the President and Chair of the Psi Upsilon Foundation. In that role he serves as the chief executive officer of the Foundation working on the strategic direction and overall execution of the Foundation programs and stewardship of all donors. For over 15 years, Alex has been in management consulting and venture based investing focusing on ESG (Environment Social and Governance) minded companies and organizations with a focus on building sustainable revenue models and scalable sales structures. Alex has a keen interest in the travel technology and Education industries as well as the arts and especially opera and classical music. Alex lives in Boston with his wife, Rumena, and two daughters.

### **Kenneth S. Ball, Eta '82 (Lehigh)**

Kenneth S. Ball is Dean, Volgenau School of Engineering (VSE) at George Mason University in Fairfax, Virginia, appointed in August 2012. Mason is the largest public research university in Virginia, and is classified as an R1

Highest Research Activity institution. VSE offers 11 different Bachelor's degree programs, 17 Master's degree programs, and seven Ph.D. degree programs. VSE employs more than 250 full-time and nearly 200 part-time faculty members (including teaching faculty), and has an enrollment of approximately 8000 students (more than 20% of Mason's total enrollment of 37,000 students). New programs proposed, developed, and approved under Ball's leadership include Bachelor's degrees in mechanical engineering, cybersecurity engineering, and statistics; Master's degrees in data analytics engineering, bioengineering, and biostatistics; and the Ph.D. in bioengineering. Under Ball's leadership, total student enrollment in VSE has doubled and total research awards have increased by a factor of 22 to \$460,000,000 in FY20.

### **Capt. James "Jimmy" T. King (ret'd). Phi Delta '97 (Mary Washington)**

James King is the Director of the United States Navy F-35C Program for Lockheed Martin Government Affairs. In this position, he maintains close liaison with the Navy and

Congress on F-35 capabilities, procurement, and sustainment. He also supports Next Generation Air Dominance and related Airwing of the Future programs.

Prior to joining Lockheed Martin, James had a successful career as a Naval Aviator in the United States Navy and Navy Reserve. He last served as the Requirements Officer for the Navy's Next Generation Air Dominance Program for the Chief of Naval Operations, Air Warfare Division. In this capacity, he led a team of military, government, and contractors across multiple studies to define the warfighting requirements for the Carrier Strike Group in the 2030+ timeframe.

Highlights include operational and instructor tours flying in the EA-6B Prowler and the EA-18G Growler. He completed numerous deployments aboard the USS Kitty Hawk (CV-63) flying missions in support of Operation Southern Watch and Operation Iraqi Freedom. Upon transition to the Navy Reserves, he joined Electronic Attack Squadron (VAQ) 209 where he routinely deployed to Bagram, Air Base Afghanistan, flying missions in support of Operation Enduring Freedom. James' final operational tour was as the Commanding Officer VAQ-209 flying EA-18 Growlers. James is a native of Virginia Beach, VA and a graduate of Mary Washington College. He and his wife, Alyssa, reside in Washington DC.

underestimated communities. A certified life coach, Devon is the Diversity, Equity, and Inclusion Program Administrator for the City of Newport News, Virginia. Devon volunteers as the Chair of the Board of Directors of the local DC harm reduction nonprofit, HIPS. Devon holds Professional Certificates in Sustainable Capitalism and ESG from the University of California at Berkeley, Diversity and Inclusion from Cornell University, a B.A. in International Relations from the College of William and Mary of Virginia, and an International Coaching Federation certification through training from Coactive Training Institute. Devon is a 2023 Social Impact Fellow. Chief of Staff to Ways and Means Chairman Dave Camp for more than a decade, James led Chairman Camp's team on successful legislative issues, including trade agreement implementation, the first comprehensive tax reform bill in a generation, and health care reform proposals. Effective team building is a crucial part of his long and effective career in law and policy, and he will share practical advice for you.

**Devon Trotter CPCC, ACC,  
Phi Beta '06 (William and  
Mary)**

Devon Trotter, CPCC, ACC (he/him, she/hers) Phi Beta, '06 is an equity and inclusion practitioner dedicated to amplifying the voices and addressing the needs of the most underrepresented, under-resourced, undervalued, and

## **FELLOWS, COACHES, & COMMITTEE** *(all titles/position/companies pulled from LinkedIn)*

<b>Name</b>	<b>Chapter Year</b>	<b>Position &amp; Company</b>	<b>Geography</b>	<b>SIF Title</b>
<a href="#">Kevin A. Klock</a>	Chi Delta '01 (Duke)	Senior Vice President of Operations and Legal Affairs (General Counsel), Foundation for the National Institutes of Health	Greater DC	SIF STEERING COMMITTEE
<a href="#">Dr. Elise Walton</a>	Kappa '80 (Bowdoin)	Board Compass Change Management Consultant	Greater NYC	SIF STEERING COMMITTEE
<a href="#">John D. Hatfield</a>	Iota '94 (Kenyon)	Executive Director at The Axia Institute – Michigan State University	Midland, MI	2022 HONORARY FELLOW
<a href="#">Dr. Audrey Fisch</a>	Gamma '87 (Amherst)	Founder of More Than Bootstraps; Professor of English at New Jersey City University	New Jersey	2022 GAMMA CHAPTER CORPORATION SENIOR FELLOW
<a href="#">Dr. Roberta Hunter PhD</a>	Epsilon Iota '94 (RPI)	xxxPartnerships	New Jersey	2024 SIF WORKSHOP FACILITATOR 2021 FISHFUND SENIOR FELLOW
<a href="#">Rich Paul</a>	Eta '10 (Lehigh)	Grant Writer and Grants Manager	Florida	2024 SIF WORKSHOP FACILITATOR 2021 SOCIAL IMPACT FELLOW
<a href="#">Jim Brandell PhD</a>	Epsilon Nu '90 (Michigan State)	Dykema	Greater DC	2024 SIF WORKSHOP FACILITATOR

<a href="#">B. Alex Hofelich</a>	Gamma Tau '98 (Georgia Tech)	Escape Artists 501c3	Greater Atlanta, GA	2023 FISHFUND SENIOR FELLOW
<a href="#">Lis Gallant</a>	Epsilon Iota '09 (RPI)	University of Hawai'i Hilo	Hawai'i	2023 DR. SAMUEL FAGER, TAU '81 SENIOR FELLOW
<a href="#">Jeremiah Olney</a>	Gamma Tau '15 (Georgia Tech)	The Nature Conservancy	Atlanta, GA	2023 GAMMA CHAPTER CORPORATION SENIOR FELLOW
<a href="#">Paul Mokrzycki</a>	Upsilon '20 (Rochester)	Uniwersytet Wroclawsk		2023 SOCIAL IMPACT FELLOW
<a href="#">Dr. Elizabeth Andresen</a>	Chi Delta '04 (Duke)	Adult and Pediatric Neuropsychologist	Indianapolis	2022 DR. SAMUEL FAGER, TAU '81 SENIOR FELLOW
<a href="#">Devon Trotter</a>	Phi Beta '06	Equitable Sustainability Coach	Greater DC	2022 FISHFUND SENIOR FELLOW
<a href="#">Dr. Alison Munzer, Ph.D.</a>	Gamma '09 (Amherst)	Postdoctoral Scholar at UC Irvine School of Education	California	2022 GAMMA CHAPTER CORPORATION FELLOW
<a href="#">Christopher Lawrence Tang, ESQ</a>	Gamma Tau '01 (Georgia Tech)	Chief Editor of the L.I.N.C. Organization and Freelance Writer	Atlanta	2022 SOCIAL IMPACT FELLOW
<a href="#">Amb. Robert Beecroft Ret'd, Tau '62</a>	Tau '62 (Pennsylvania)	Retired	Greater DC	2020 HONORARY SOCIAL IMPACT FELLOW

<a href="#">Rico Francis</a>	Phi Nu '18	Pacers Sports and Entertainment - Social Impact Director	Indianapolis	2020 GAMMA CHAPTER CORPORATION SENIOR FELLOW
<a href="#">Dr. Osman J. Bhatti, M.D.</a>	Pi '10	Rheumatologist at Advocate Health Care	Chicago	2020 DR. SAMUEL FAGER, TAU '81 FELLOW
<a href="#">Rhoden Monroe</a>	Beta Beta '09	Founder & CEO at CariClub	Greater NYC	2020 SOCIAL IMPACT FELLOW
<a href="#">Dan Coveillo</a>	Eta '13 (Lehigh)	Strategy Consultant at Monitor Deloitte	Zurich, Switzerland	2020 SOCIAL IMPACT FELLOW
<a href="#">Dr. Barbara Hendrie</a>	Kappa '80 (Bowdoin)	Director, North America UN Environment	Greater DC	2021 HONORARY SOCIAL IMPACT FELLOW
<a href="#">Dr. Brian Christie</a>	Zeta '07 (Dartmouth)	Hand and Reconstructive Surgeon Indiana University School of Medicine,	Indianapolis, IN	2021 GAMMA CHAPTER CORPORATION SENIOR FELLOW
<a href="#">Dr. Daniel Correa</a>	Phi Delta '04 (Mary Washington)	Assistant Professor, <a href="#">The Saul R. Korey Department of Neurology</a>	New Jersey	2021 DR. SAMUEL FAGER, TAU '81 SENIOR FELLOW
<a href="#">Bri Watson</a>	Delta Nu '11 (Keene State)	Author, Editor, Researcher	Canada	2021 SOCIAL IMPACT FELLOW
<a href="#">Mike Thibideau</a>	Epsilon Nu '11 (Michigan State)	Vice President of Workforce Strategy at Hamilton County Economic Development Corporation	Indianapolis, IN	2021 SOCIAL IMPACT FELLOW
<a href="#">Alex Senchak</a>	Eta '06 (Lehigh)	Management Consultant and Investor focusing on ESG companies and organizations. Focused on travel technology and Education industries.	Boston, MA	CHAIR AND PRESIDENT PSI UPSILON FOUNDATION SIF STEERING COMMITTEE
<a href="#">Gary Pan</a>	Eta '86 (Lehigh)	Panacea Consulting LLC Virginia Commissioner of Labor and Industry	Great Falls, VA	SIF STEERING COMMITTEE

<a href="#">Jonathan Chaffin</a>	Gamma Tau '00 (Georgia Tech)	CEO Horror In Clay LLC CEO FlipKat Productions INC	Atlanta, GA	DIRECTOR OF MEMBER ENGAGEMENT PSI UPSILON FOUNDATION
<a href="#">Thomas Fox</a>	Omicron '00 (Illinois)	Psi Upsilon Fraternity	Indianapolis, IN	EXECUTIVE DIRECTOR PSI UPSILON FRATERNITY
<a href="#">Jay Riemenschneider</a>	Beta Alpha '91 (Miami University [OH])	Echo Investing	Akron, OH	SENIOR PHILANTHROPIC ADVISOR
Dr. Kenneth Ball, P.E.	Eta '82 (Lehigh University)	Dean, College of Engineering and Computing at George Mason University	Fairfax, VA	2024 HONORARY SOCIAL IMPACT FELLOW
Alannah Rivera-Cancel	Chi Delta '19 (Duke University)	Clinical Research Coordinator at Center for Eating Disorders (DCED) / Volunteer Fire Department EMS	Raleigh-Durham-Chapel Hill Area	2024 GAMMA CHAPTER CORPORATION SENIOR FELLOW
Greg Eidsness	Zeta Zeta '07 (University of British Columbia)	Managing Director @ Saskatchewan Singapore Office	Singapore	2024 FISHFUND SENIOR FELLOW
Adam Park	Omega '93 (University of Chicago)	President of the Omega Chapter Alumni Corporation	Chicago	2024 SOCIAL IMPACT FELLOW
Logan G. Spector, PhD	Phi Beta '95 (College of William and Mary)	Professor at University of Minnesota-Twin Cities	Minneapolis	2024 DR. SAMUEL FAGER, TAU '81 SENIOR FELLOW

## **HONORS AND RECOGNITION OF THE FELLOWSHIP**

The reception this evening is designed to celebrate in person the 12 brothers who have been recognized as contributing to the betterment of society by receiving the Psi Upsilon Social Impact Fellowship in the last 2 years.

You can read more about this years' cohort and the program in the recent Psi Upsilon "Beacon" linked here:



You can read more about prior cohorts in the Psi Upsilon "Beacon" linked here:

[https://issuu.com/psiupsilon/docs/2023\\_beacon\\_leadership\\_fall\\_issue\\_11.16.23\\_1605](https://issuu.com/psiupsilon/docs/2023_beacon_leadership_fall_issue_11.16.23_1605)

[https://issuu.com/psiupsilon/docs/2022\\_beacon\\_leadership\\_fall\\_issue\\_11.3.22\\_web](https://issuu.com/psiupsilon/docs/2022_beacon_leadership_fall_issue_11.3.22_web)  
[https://issuu.com/psiupsilon/docs/2021\\_fall\\_leadership\\_beacon?ff](https://issuu.com/psiupsilon/docs/2021_fall_leadership_beacon?ff)

[https://issuu.com/mariannwms/docs/2020\\_novemberbeacon\\_withininsert\\_issuuversion](https://issuu.com/mariannwms/docs/2020_novemberbeacon_withininsert_issuuversion)

## **REMAINING SIF UPCOMING EVENTS AND DEADLINES**

**Feb TBA** - Book Discussion

**May 15 – Deadline to submit stipend intention use form**

**June 7** – Final date for fund disbursement

**June 15** – Deadline for Stipend Receipts

**Late June** – 2025 Wrapup zoom

**July** – Nomination period begins for 2023-24 Social Impact Fellowship cohort

## **UPCOMING EVENTS AND DEADLINES**

March 2025 – March Challenge

Email [jonathan@psiu.org](mailto:jonathan@psiu.org) to be a matcher for your chapter



## **Psi U. Doxology**

*O God, Thy blessing now shed down  
Upon our loved Psi Upsilon;  
May all her ties of Friendship be  
Strengthened and honored,  
Lord, by thee.*

## **Welcome Brothers**

*Welcome brothers, old and young,  
Welcome ev'ry loyal son,  
All who wear the emblem of the chosen few;  
Let us loud our voices ring,  
And each brother gladly sing,  
Sing the praises of our own, our lov'd Psi U.*

*Chorus*

*Psi Upsilon, Psi U. forever!  
Symbols dearest to our heart!  
Ever 'round thy holy shrine  
We'll the victor's myrtle twine,  
And our love for thee,  
Psi U., shall ne'er depart.*

*-2-*

*In our various paths of life  
Cares and sorrow may be rife,  
And the night be dark and faithful friends be few;  
When the storm is raging high,  
And deep darkness rules the sky,  
Then the beacon light shall burst from old Psi U.*

*-3-*

*When our race on earth is run,  
And our labor here is done,  
And the jeweled crown of life is fairly won,  
May our last, faint, faltering breath,  
Ere 'tis hush'd in silent death,  
Breathe the sweetest of all words, Psi Up-si-lon.*