

Roundtables FRAMEWORK

Overview

Objective

The objective of the NAWBO Roundtables is to develop intimate business relationships with a small group of members, providing support, feedback and expertise, while encouraging success for all members.

Guiding principles

- Confidentiality – all information shared during round table meetings remains within the group
- Communication – open and supportive
- Advice – don't offer business advice, rather provide suggestions or examples of things that you have done
- Advertisement-Free - meetings will be a “sales pitch free” zone
- Commitment - members will regularly attend and participate in the meetings

Rules of Engagement

1. Must be a Premier/Established member in good standing both locally and nationally.
2. Commitment to attendance and participation is mandatory to the success and harmony of the group - after missing three (3) meetings in a row, it's up to the group to determine if the group member will be asked to leave or not. If a current Roundtable member decides to leave their existing group, reassignment to a new group may take up to 6 months.
3. The minimum number of members suggested for a group is 5, the maximum is 9. Any more or less may become difficult to manage and limit the individual and collective value intended for the group meetings.
4. Roundtables will be composed of non-competing businesses to ensure trust and confidentiality within the group.
5. The Roundtable Committee will form new groups that are diverse in their revenue levels, size, and years in business.

6. If a member leaves a roundtable, the leader of the roundtable will communicate that to their Roundtables Committee liaison.
7. If a roundtable disbands, the most recent leader will notify the Roundtables Committee to place members in new groups.
8. The Roundtables Committee will act as a clearinghouse when new members are needed within individual roundtables. They will officially place all new members within groups.
 - a. They will encourage groups to add members, when there's an opening within a group, at diverse business revenue, size, and experience levels.
 - b. If a roundtable has a new member preference, they will communicate that to the Roundtables Committee liaison for a preferential placement opportunity.
 - c. Individual roundtables will have (4) weeks to communicate if a new member has joined and communicate that back to their liaison.
9. Members of a roundtable who are interested in helping with the overall roundtable program are eligible to join the Roundtables Committee based on a few requirements. The Roundtables Committee will consist of NAWBO members that have been a member of a functioning Roundtable for at least (1) year, or the same length of time in a Vistage or YPO group. They will also agree to abide by the Roundtables Committee Expectations document, as approved by the NAWBO Columbus Board of Directors.
10. The Roundtables Committee suggests a First Meeting structure and structure for meetings thereafter. That structure is outlined in the document below.

Guidelines

Meeting times: Team members can determine frequency, time and location of meetings. It is recommended that roundtables meet a minimum of once per month, for a minimum of 2 hours to ensure that everyone gets a chance to contribute. It's also recommended that a consistent day of the month and time of day be established for the meeting.

Group Leader/Central Point of Contact – the group will select a leader who will be the central point of contact for NAWBO Columbus, the Roundtables committee, and all group members. Meeting coordination, feedback, requests and questions will be filtered through the Group Leader. The leader will oversee reminders on location, details/theme of meeting, and sharing any documents and information provided by the Roundtables Committee. The Group Leader will be the single point of contact for Roundtable Committee communications. Group Leader responsibilities can be rotated if desired, but no more than 2 times per year. The leader will be in communication with Roundtable Committee member who will serve as liaison for advanced guidance. If a Group Leader leaves the

group, the Roundtable will decide who takes over responsibilities and communicate that with the committee liaison.

Time Management/Participation/Meeting Structure

1. First meeting: The new roundtable will meet with their assigned Roundtable Committee liaison to go over the Roundtables Framework to help the group get acclimated. There will also be an introductory period during the meeting that includes:
 - Each person sharing a summary of their business
 - Disclosing how long they've been in business and the number of employees
 - Sharing products/services offered by each member
 - Sharing accomplishments/challenges in each member's business
 - Explanation of the business' target audience and competitive factors
 - Personal highlights (family, kids, partners, interests, boards, sports)
 - Share goals wanted in Roundtable experience
 - Sign Non-Disclosure form provided by Roundtables Committee
 - Exchange contact information, email, mobile, et cetera

2. Best Practices and Recommendations for regular meetings:
 - Fill out Roundtable Monthly Update prior to monthly meeting and share at meeting.
 - Utilize timer during meeting—rotate timekeeping among members.

Sample Agenda

- I. Presentation – open discussion, ask if any member has current challenge
- II. Member presents the issue/challenge, either professional or personal, to the group (10-12 minutes)
- III. Members ask clarifying questions (5-7 minutes)
- IV. Quiet period while members write down ideas and thoughts regarding situation presented (3 minutes)
- V. Each member shares ideas and suggestions or experience that relates to the situation (10 minutes)
- VI. This process will re-occur throughout the 2-hour period
- VII. Meeting ends with the details for the next meeting: reminder/decision on topic, speaker, book review, et cetera.



3. Pick a topic or a book for a series of conversations, i.e. current business challenges, hiring, controlling expenses, managing time, volunteering, networking, lessons learned, leadership strategies, mentoring. NAWBO Roundtable Committee can provide list of resources/facilitators upon request.
4. Field trips/Retreats – plan a team building field trip, i.e. spa time, show time (Ohio Theatre), cooking class, painting class, winery tour
5. StrengthsFinder – have each member take the StrengthsFinder online assessment or through smartphone application and bring their results to share with the group. StrengthsFinder provides another tool from which to learn about each other and leverage the strengths of others.

For additional information or questions about your Roundtable, please contact VP of Roundtables Mikaela Hunt: mikaela@mikaelahunt.com or your Roundtable Liaison