

Roundtables Framework & Overview

Objective

The objective of the NAWBO Roundtables program 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 roundtable meetings remains within the group
- Communication – open and supportive
- Advice – groups don't offer business advice, members rather provide suggestions or examples of things that they have done
- Advertisement-Free - meetings will be a "sales pitch free" zone
- Commitment - members will regularly attend and participate in the meetings

Placement Policy

The Roundtables Committee application will include questions that determine if a person is part of an S-Corp, LLC, has part-ownership in a company via a % model, an MLM, or has a book of business such as in a law firm, as an independent agent for a local realty or insurance agency, or as a W-2 style financial advisor. After NAWBO staff reviews the application, the Roundtables Committee will place individuals into roundtables where there would not be more than one person with less than 5% ownership of a business in one group. If a person comes through the application process and staff determines they do not meet any of those categories, they will not be eligible to be on a roundtable.

Rules of Engagement

1. Must be a Premier/Established member in good standing both locally and nationally. The application determines what kind of business a member is a part of and placement will be based on those questions and categories.
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 groups 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. Roundtable members are not permitted to provide free services within the group but reciprocal in-kind services are allowed.

6. The Roundtables Committee will form new groups that are diverse in their revenue levels, size, and years in business.
7. If a member leaves a roundtable, the leader of the roundtable will communicate that to their Roundtables Committee liaison.
8. If a roundtable disbands, the most recent leader will notify the Roundtables Committee to place members in new groups.
9. 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.
10. The Roundtables Committee suggests a First Meeting structure and structure for meetings thereafter. That structure is outlined in the Roundtables Framework & Overview document.

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

The NAWBO Roundtable Committee has created a framework for your first three meetings to help you get started as effectively as possible. Ultimately, your NAWBO Roundtable should serve your needs! Videos and worksheets are available on the NAWBOCBUS.org website.

Meeting 1: Your first NAWBO Roundtable session should be focused on getting to know one another. Please note: you are required to sign our non-disclosure agreement and submit them before your second meeting.

Meeting 2: Your second NAWBO Roundtable session should be focused on beginning to understand which meeting structure will work best for your group.

Meeting 3: By now, you should be familiar with each of the members in your group. We recommend trying a different one of our three suggested meeting structures see how it works for your group.

Roundtables Committee Eligibility

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.

For additional information or questions about your roundtable, please contact VP of Roundtables Stefanie Fox Jackson stefmjackson@gmail.com or your Roundtable Liaison.