



## 2018 Roundtable Leader Startup Checklist

- Plan and gain RT acceptance for your 2018 calendar at the Dec/Jan meeting.**

Include:

- Monthly RT meetings (w/ hosts & sponsors)
- the RT Retreat
- Refresher Training with Mo or another trainer
- Holiday Dinner or other special events

Avoid:

- CEO Retreat (April 25-27)
- Quarterly Luncheons (Jan 25, March 22, Sept 20, Nov 15)

Agree on a schedule change protocol.

- Review your Roundtable's constitution at your first meeting as leader. Revise if necessary and reaffirm everyone's commitment to these shared expectations.**
- Appoint a Retreat Planner**
- Appoint a "One Great CEO" membership campaign chairperson to encourage referrals and serve as liason with VACEOs office**
- Appoint an Advisory Board member**
- Schedule Refresher Training (you should delegate this)**
- Delegate anything else you can!**
  - Attendance reporting (include hosting, presenter, coach tracking)
  - Meeting reminders
  - Holiday gathering, etc.
- Determine who will be the next roundtable leader. Get Leader Training on his or her calendar.**

## 8 Things Successful RT Leaders Do

### 1. Participate in RT Leader Forum meetings

Put these dates on your calendar: **Feb 15** at 12:00 / **May 8** at 3:30 / **Aug 9** at 12:00. Serving as a Roundtable Leader is a tough job. Get some peer support and join other leaders to ask questions, solve problems and learn from what other RTs are doing well. If the leader cannot make it, another member should attend.

### 2. Identify RT Leader-elect and schedule them for Leader Training on Dec 11.

Unless your RT wants you to continue as Leader, you should have your Leader-elect identified by June. Then, make sure that person has blocked out date tbd, time tbd to time tbd, for Leader Training.

### 3. *Sharpen the saw.* View and discuss a short RT Training Video at your RT meeting.

We have Roundtable Training videos on: Coaching, Updates & Parking Lot, Presentation Process, Confidentiality, Language Protocol, and Personal Responsibility. Leaders have found these useful to keep their groups sharp and continually improving. See links below in Resources.

### 4. Plan Refresher Training

Schedule your annual, half-day refresher training with Mo Fathelbab or another trainer. This training focuses on your needs. Not enough meaty presentations? Is your coaching effective? Is your meeting discipline lax? Contact Connie with your upcoming meeting dates. She will check on Mo's availability and get you scheduled (or she can get Mo's open dates for you). The Council will even provide meeting space and a meal.

### 5. Plan a Roundtable Retreat this year

Roundtable Retreats bring groups closer together, give you a chance to dive deeper or to engage in a different way. You can bring in a facilitator, or not. We have \$1500 budgeted to support your Retreat this year. Submit receipts to the office for Retreat expenses – food, lodging, activities, transportation, facilitation, etc.

### 6. Get your whole Roundtable to the CEO Retreat April 25-27

The CEO Retreat creates more common experiences from which you all can learn and share. The more of you who are there, the more robust the ongoing conversation and learning from the program and speakers.

### 7. Invite Sponsors to present (teach) at your meetings

See the "Sponsor Presentation Topics" catalog for ideas and invite a sponsor to present at the beginning of your meeting. 30 to 45 minutes is the usual timeframe. Every roundtable is asked to have two sponsor presentations annually, but you can have as many as you want. We ask that you seek sponsors first when having an outside presenter.

## RESOURCES

“Forum” - Mo Fathlebab’s book. All new members receive a copy. If you need one, just ask!

**Sponsor Presentation Topics** catalog. Download the catalog at [www.vaceos.org/sponsors](http://www.vaceos.org/sponsors)

**Roundtable Forms and Resources** are available for download at [www.vaceos.org/resources](http://www.vaceos.org/resources)  
These include Roundtable Training Videos, forms and samples.

### Volunteer Staff

**Board Vice Chair JJ White** is your board member who has responsibility for Roundtable success. Feel free to contact JJ for help.

Call 804-270-0200, 540-915-2900 (cell), or email [jj.white@dalecarnegie.com](mailto:jj.white@dalecarnegie.com)

### Professional Staff

**Executive Director, Scot McRoberts** can help you with training, adding members to your Roundtable, and most anything else. Just ask!

Call 804-360-2644 or email [smcroberts@vaceos.org](mailto:smcroberts@vaceos.org).

**RT Leader Coach, Danessa Knaupp (Avenue 8)** is available to consult with you to help you lead your Roundtable. Email [danessa@ave8advisors.com](mailto:danessa@ave8advisors.com)

**Manager; Member Services & Programs, Connie Bruce** is your contact to for reporting! She can also help with all events, training, requesting a conference room at VACEOs headquarters and booking your Roundtable meeting in conjunction with a Council event (which we are happy to do).

**\*Every month, please email Connie with:**

- 1) attendance - who missed, if anyone; and
- 2) which sponsor visited, if any, and a quick 1 to 10 rating.
- 3) send pictures from meetings or outings, tidbits from RT Retreat.

**\*See form on page 4 to help with reporting.**

Call 804-360-2644 or email [connie@vaceos.org](mailto:connie@vaceos.org).

**Programming Support Coordinator, Tiffany McCarthy** is your contact for reporting referrals (One Great CEO), booking conference rooms and general membership and event information.

Call 804-360-2644 or email [tiffany@vaceos.org](mailto:tiffany@vaceos.org).



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### Roundtable Leader Meeting Update

Form can be scanned and sent to [connie@vaceos.org](mailto:connie@vaceos.org) or just email Connie with the information.

Date of Meeting \_\_\_\_\_ Roundtable # \_\_\_\_\_

Roundtable Leader \_\_\_\_\_

Number in attendance \_\_\_\_\_

Name(s) of absent members \_\_\_\_\_

Sponsor presentation? \_\_\_\_\_

If yes, name of sponsor, topic and feedback \_\_\_\_\_

Would you like to schedule RT Refresher Training? \_\_\_\_\_

Comments/questions?  
\_\_\_\_\_