



Adding Members to Your Roundtable or Forum

Follow these steps . . .

1. **The Leader should place the issue on the agenda at regular meeting** and determine
 - a. How many members you would like to add?
 - b. Are there any preferences around gender, industry, experience, etc.?
 - c. What is your current meeting schedule?
 - d. What is your timeframe for adding members?

2. **Contact the executive director with this information.**

3. **The executive director will reply to the Leader** in one of two ways.
 - a. With an estimated time until he can begin the process. If delayed, it may be due to other groups ahead of you, or a lack of available members.
 - b. Or, he will respond with a list of members to consider. You will receive name, company and web URL for each member.

4. **Next steps for you.**
 - a. Share the list of members with your group. This process is confidential to your group.
Note: We do not interview or vet potential members in person for roundtable selection. Every member has already been personally interviewed and found to meet the qualifications for membership in the Council. We are confident that sound procedures in Roundtables and Forums accommodate a wide range of personalities.
 - b. Ask your members to review the potential members for personal or professional conflicts.
 - c. Then, rank the candidates that are acceptable and return this ranking to the executive director.

5. **The executive director will then contact the candidates**, starting with the top ranked, sharing your group roster (name, company, URL) and asking the candidate if they are free of conflicts, and if they would like to join this group.

6. **The executive director will then share with the Leader** full contact information for the confirmed new members, at which time the Leader should contact the members and initiate onboarding.



VA COUNCIL OF CEOS
follow the leaders

7. Onboarding

- a. Call each new member and introduce yourself and talk about next steps. Follow up with an email so that the member will have your contact information.
- b. As soon as possible, schedule a face-to-face meeting to get to know one another, and to introduce the member to your group's constitution, expectations, schedule and culture. Include a couple of other current members, if possible. You can do this with several new members at a time, if you wish.
NOTE: New members have not had input into the current meeting schedule of your group. Now they must, as they are equal members of the group. You may have to re-address your meeting times, dates with the newly composed group.
- c. In this meeting, or another, do some minimal training around the Gestalt Language Protocol, the Presentation Process and roles in the meeting. Each new member has received a copy of the book *FORUM*, by Mo Fathelbab, which describes all of these elements. Our training videos online are another good resource.
- d. Get your new members to the soonest possible meeting. Some options for introducing new members:
 - i. Add an extra 5 or 10 minutes to updates (both current and new members) for background on the CEO and their business.
 - ii. If you have had time for good orientation (see 7. c. above), you could just proceed with a regular meeting.
 - iii. Plan a group meal before or after the meeting to allow for members to get to know one another outside of the meeting process.
- e. Plan Roundtable Training as the first meeting with your new members. Our trainer can help you all get to know one another and train old and new members. If not the first meeting, you should schedule refresher training for the newly composed group as soon as possible. This is usually a half day. If your group includes a majority of brand-new members, a full day is appropriate.