

Peoria Area Chamber

CEO

roundtable

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# CEO roundtable guidelines

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CEO Roundtables are designed to provide a unique environment for Owners, CEO's, and/or key decision makers within their company to access each other as business advisors, to learn together, and to develop a mutual support network.

- Is led by a single facilitator on a rotating basis. (This responsibility can be shifted based on the members' preference.)
- Have an average of 8-12 members, each representing non-competing companies: for the purposes of the roundtable, "non-competing" is defined as "to not compete for the same client/customer relationships".
- Each CEO Roundtable group defines their own rules/regulations/guidelines that all of the group members are comfortable with.
- Meet once per month – in most cases the meeting will rotate to each member's business in hopes to capture how they function, with the intent to learn more about each company.
- Operate with autonomy in regard to: developing group objectives and priorities, agendas, meeting dates, times, and locations.
- Maintain confidentiality of the information shared in meetings. Each CEO Round Table member will sign a Confidentiality Statement in support of this policy.
- Owners, CEO's, or other key decision makers in small to medium sized businesses.
- Attendance is critical to Round Table success. To remain a member, participants cannot have more than 3 unexcused absences within a 12-month period.
- Approval and election by existing members is required before new members are invited to join the CEO Roundtable.

#### Potential new members:

- Will be proposed from CEO Round Table applications received by the Chamber or identified by extra members within a roundtable.
- Member must work for a Chamber member business.



Though each roundtable will create its own agenda, the following elements have been found to be successful. Each group has flexibility to use and adapt these individual features, with the exception of confidentiality, to meet their group's individual needs.

- o Statement of Confidentiality

What is said, stays in the meetings. No disclosures can be made to anyone outside of the group. Both content and behavior are confidential. The group as a whole should deal with breaches of confidentiality.

- o Personal Updates

Each roundtable member is expected to give a brief update at each meeting. Each member updates the group on significant business, personal, or family issues.

- o Business Topics

It is suggested that the business topics are chosen a month prior to the next meeting. This allows each member to brainstorm their ideas on the topic.

- o Evaluation of the Meeting

The facilitator will take a few minutes to ask the group to identify what was gained from the meeting, what needs to be changed, and any other comments or feedback.

- o Housekeeping

The facilitator typically ends the meeting with identifying and resolving any housekeeping duties such as time and place for the next meeting, long term scheduling, future topics, and member issues.



### Administrative Duties Include:

- Keeping an updated group contact roster.
- Determining a meeting place with the group.
- Encouraging and reminding group members to pay their annual dues on time.
- Communicating to the group meeting dates, times, and locations (including directions), at least one week prior to the meeting dates.
- Assigning responsibility for hosting the group.
- Following up with those who do not attend meetings.
- Accepting RSVP's for every meeting.

### Roles of the Facilitator:

- The facilitator is the key in the success of the roundtable. He or she serves as the administrator for the group, facilitate each meeting, and is the liaison between the group and the chamber. The facilitator role is best served by someone who can both operate as peer while guiding the group.

### Roles of Roundtable Group Members:

#### **Roundtable Group Members are required to:**

- Attend group meetings (make them a priority and be on time).
- Always maintain confidentiality. Breach of confidentiality will be grounds for expulsion.
- Always give notice if unable to attend meetings.

- Be prepared to listen, discuss, and participate.
- Respect other members' time and feelings.

#### **Roundtable Member duties include:**

(Members can take turns with these at the monthly meetings.)

- Guiding and redirecting the group.
- Keeping an open mind and encouraging group members to do the same.
- Keeping the meeting moving but not directing.
- Leading the group to assess its needs.

#### Liaison duties include:

- Reporting all group roster changes, including added or dropped members and group contact information changes.
- Providing program feedback to help the Chamber determine relevant program content.
- Asking the Chamber for assistance if the group is struggling.

#### Roles of Group Hosts:

- Roundtables are typically hosted by a member, who provides or secures an appropriate location. Hosts may furnish light refreshments or a meal.



The more you deal with real issues and problems facing your business, the more you are likely to gain from the Roundtable experience.

## Possible Topics

- How to gain new business.
- Marketing.
- Improving profitability.
- Financial issues such as: cash flow, collection strategies, pricing.
- Strategies to improve customer services.
- Recruit and retain employees in a tight market.
- Creating a profit-sharing plan.
- Setting up a fair and equitable compensation system.
- Dealing with partnership problems.
- How to balance business and your personal life.
- Controlling growth without being controlled by it.
- Handling public relations in a crisis situation.



# CEO roundtable application

name \_\_\_\_\_ title \_\_\_\_\_

company \_\_\_\_\_

company address \_\_\_\_\_ city/state/zip \_\_\_\_\_

company phone \_\_\_\_\_ fax \_\_\_\_\_

email \_\_\_\_\_ company website \_\_\_\_\_

my business is a:     Partnership             Corporation             LLC             Sole Proprietor

years in current position: \_\_\_\_\_ years with company \_\_\_\_\_

year company established: \_\_\_\_\_ number of employees \_\_\_\_\_

type of business (check all that apply)

- family owned
- manufacturing
- retail distribution
- contract service
- wholesale
- technology
- construction professional services
- other (please specify) \_\_\_\_\_

market served:

- local
- regional
- national
- international

describe your company's product and/or services: \_\_\_\_\_  
\_\_\_\_\_

Cost: \$150 annual fee, 1 meeting a month (lasting 2-3 hrs.)

what are your primary areas of interest or topics of discussion for the roundtable? \_\_\_\_\_  
\_\_\_\_\_

Each roundtable selects candidates for membership in the roundtable. This form will assist the roundtables in their selection process. Roundtable participants must be members in good standing of the Peoria Area Chamber of Commerce. Completion of this application does not guarantee acceptance into a specific roundtable or the CEO Roundtable program.

mail form to:

Peoria Area Chamber of Commerce  
c/o CEO Roundtable  
100 SW Water  
Peoria, IL 61602

or contact Sarah Stabler at:

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p. 309.495.5914  
f. 309.495.5978

