

# EO [Chapter] - Forum Character Profile

EO Forum Name: \_\_\_\_\_ Date: \_\_\_\_\_

Moderator: \_\_\_\_\_ Moderator Elect \_\_\_\_\_

Indicate the importance of each characteristic as follows:

0 = Not important / Informational

1 = Important

2 = Deal breaker

N/A = Not applicable

Please write any comments you feel would help characterize your forum.

## Meeting Structure

Characteristic	Importance
Timekeeping: <input type="checkbox"/> We keep strict adherence to timelines during meetings <input type="checkbox"/> We prefer adherence to timelines during meetings, with flexibility to adjust timelines by consensus <input type="checkbox"/> We prefer flexibility during meetings with less emphasis on timekeeping	
Forum Mindset / gestalt: <input type="checkbox"/> Forum Mindset is consistently adhered to, without exception <input type="checkbox"/> Forum Mindset is expected as default, with allowances for presenter to request non-gestalt feedback if desired <input type="checkbox"/> We prefer flexibility in how feedback is given, without emphasis on Forum Mindset	
Preferred mix of business vs/ personal time in presentations is: <input type="checkbox"/> % business And <input type="checkbox"/> % personal/family	
Meals: <input type="checkbox"/> Meals before/after forum meetings are not required <input type="checkbox"/> Required participation in breakfast/lunch/dinner before/after each Forum meeting	
Format: <input type="checkbox"/> Forum meets in-person <input type="checkbox"/> Forum meets online <input type="checkbox"/> Forum meets in-person or online as necessary	



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## Meeting Structure (continued)

Characteristic	Importance
<p>Schedule:</p> <p>Recurring meeting occurs monthly on _____</p> <p>From (start time) _____ to (end time) _____</p>	
<p>Late penalties:</p> <p>Penalties of \$_____ are assessed for interruptions/late arrivals/late breaks</p>	
<p>Attendance:</p> <p>Members may not miss more than ___ meetings per year</p>	
<p>Preferred level of seriousness during meetings is:</p> <p>___ (1=low, 10=high)</p>	

## Retreat

Characteristic	Importance
<p>Frequency:</p> <p>___ Our forum has a single annual retreat</p> <p>___ Our forum schedules 2 retreats annually, one full-length and one mini-retreat</p>	
<p>Budget:</p> <p>Budget for the annual retreat is typically between (min) \$_____ and (max) \$_____</p> <p>Budget for the mini-retreat is typically between (min) \$_____ and (max) \$_____</p>	
<p>Participation:</p> <p>___ All members must participate in annual retreat(s)</p> <p>___ Participation in retreats is not mandatory</p>	
<p>Facilitator:</p> <p>Does your forum use facilitator?</p>	



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Retreat duration/travel: Retreat duration is _____ Mini-retreat duration if applicable _____ ___ Drive to retreat ___ Fly to retreat	

## Company Demographics

Characteristic	Importance
Member companies must have a minimum of _____ employees and/or not more than _____ employees	
Member companies must have have minimum revenue of at least \$_____ and/or not more than \$_____	
Growth: ___ All forum members must be actively pursuing growth of ___% or more ___ Forum members are expected to be pursuing growth; rate may vary ___ A focus on growth is not required/emphasized in our forum	
Our forum is for companies in the following business cycle stage(s): ___ startup ___ funding ___ mature ___ other (please specify): _____	
Industry Focus: ___ Our forum is exclusively for companies in (industry/vertical): _____ ___ Our forum has no particular industry or vertical focus	



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## Member Demographics

Characteristic	Importance
Age range of Forum members is: ___ to ___	
Children: ___ Forum members have children at home ___ Forum members are empty-nesters ___ Forum members have no children	

## Social Culture

Characteristic	Importance
Members are expected to attend at least ___ social events with SLP and/or ___ social events for member (annually)	
Level of friendship outside of forum is ____ (1=low, 10=high)	
Social events we attend or organize as a forum tend to be ___ fancy ___ casual ___ eclectic ___ other (please specify): _____	
Alcohol consumption at social events or on retreats is: ___ None ___ Minimal ___ Moderate ___ Excessive at times	



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## Social Culture (continued)

<p>Use of recreational drugs at social events or on retreats is:</p> <p><input type="checkbox"/> None</p> <p><input type="checkbox"/> Minimal</p> <p><input type="checkbox"/> Moderate</p> <p><input type="checkbox"/> Excessive at times</p>	
<p>Level of religious conversation and interaction is:</p> <p><input type="checkbox"/> None</p> <p><input type="checkbox"/> Low</p> <p><input type="checkbox"/> Medium</p> <p><input type="checkbox"/> High</p>	

## Other

<p>Are there any additional preferences, considerations, or constraints that are important for participation in your forum? (Please specify)</p>	
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