

COLLABORATIVE FORUM PLACEMENT PROCESS

The Collaborative Forum placement process has worked in many Chapters worldwide. This process makes placement easier for the Presidents, Forum, Membership, and Member Engagement Chairs, as well as for the Forums and the new members,

because it has worked!

THE WHY

We believe that inclusion within Forums enriches lives and that a potential new Forum member's value cannot be determined by an interview. The value will be revealed within the safety of Forum.

Core Values:

TOGETHER WE GROW

We are committed to each other's growth and well-being. We build deep human connections across rooms, cities, countries, and continents. Our community is inclusive, and we value diversity. We are from different cultures, religions, and backgrounds, but EO binds us together.

TRUST AND RESPECT

Each of us is unique and equal. We listen with an open mind and appreciation for different points of view. This value is fundamental to EO. Through trust and respect, we create a safe space where you can always be your complete, authentic self.

Non-discrimination, Anti-harassment, and Anti-retaliation, Policy (DHR)



- Discrimination, sexual harassment, retaliation for filing a complaint.
- Investigations managed by EO globally.
- Applies to all EO members, chapters, products and services.

Non-discrimination in Forums

- Forums are an EO product and are therefore subject to EO's Non-Discrimination policy.
- Must-in forum constitution language provided.
- Potential disciplinary actions for Forums in violation.

STEP 1

FORUM CHAIR TALKS TO THE FORUM MODERATORS

- Are the Forums looking for new members, if any? How many?
- Forum chair collects the forums values and constitution, a new member should be aligned with both.
- Moderator to determine which industries are already represented in the Forums to ensure there are no conflicts. (To avoid direct competitors in a Forum).
- How is the Forum Health? (If a Forum is not doing well, adding new members to it will add to the problems).

STEP 2

FORUM CHAIR MEET WITH THE MEMBERSHIP AND MEMBER ENGAGEMENT CHAIRS

- What type of prospective members are in the pipeline?
- Intake followed by training and placement in quick succession.
- Forum Chair, Member Engagement and Membership (Trifecta).

STEP 3

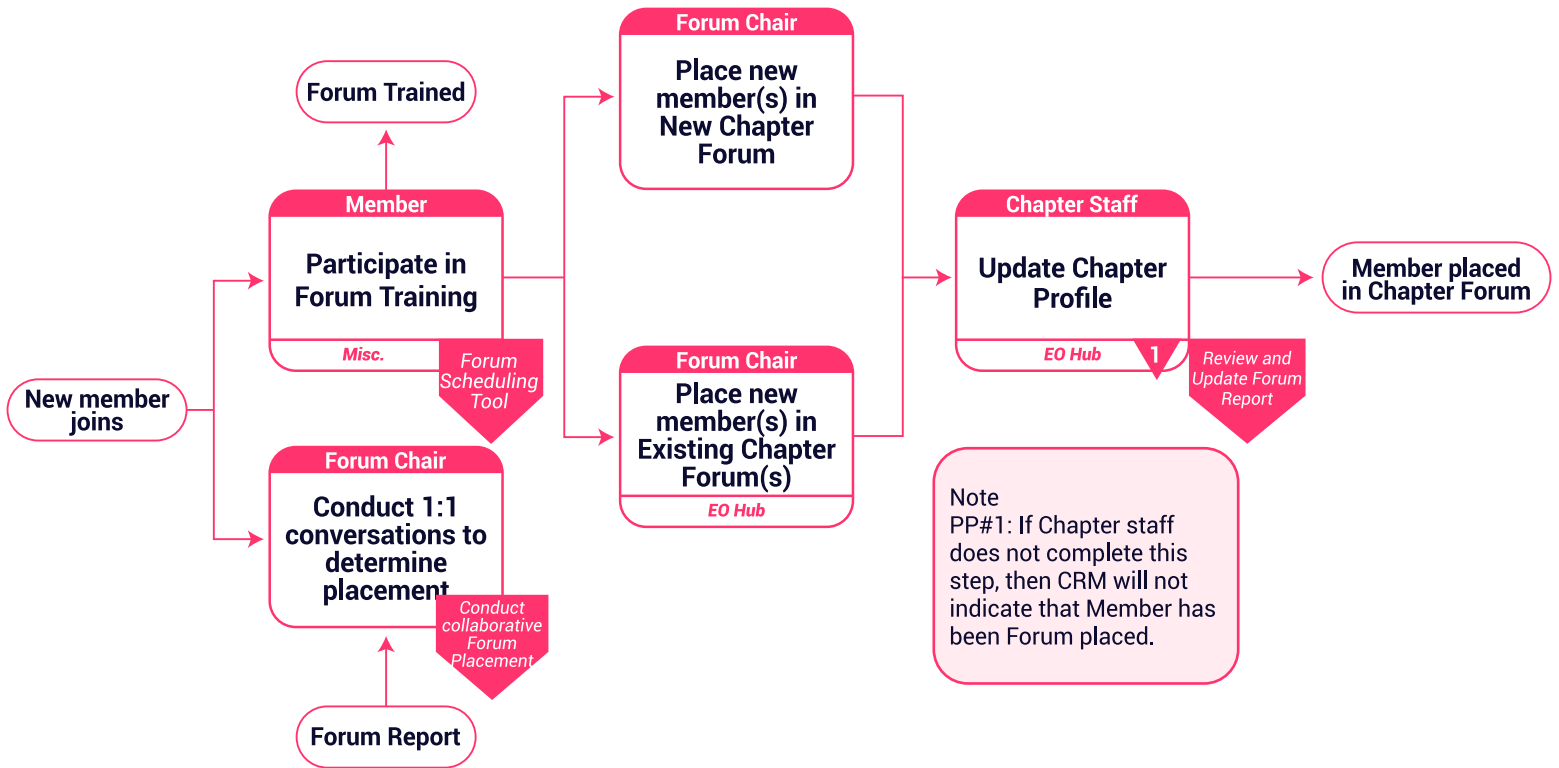
EVALUATE PROSPECTIVE MEMBERS

- Post-event, evaluate and gauge if prospective members fit into Forums that are looking for new members and are aligned with the forum's values and constitution.
- Moderators can evaluate and inform the Forum Chair which members are a good fit for their Forums.

STEP 4

PLACEMENT INTO FORUMS

- Once all information has been gathered, the Forum chair places the members who were successful at the Test Drive into existing Forums.
- The Forum Chair has the final say in the placement of a new member, considering all of the options.
- The Moderator supports the placement by ensuring there are no conflicts to ensure the integration of the new member.
- The Moderator can "pass" on only one new member per fiscal year.



Additional recommendations

If a forum refuses a new member placement with no conflict, they are off the forum placement list for new members.

If there is a conflict, they keep their priority in forum placement.

With 6 + new members, launch a new forum. Have chapter Seed Moderator volunteers for first 6 months.

With 3+ new members, get chapter volunteers to temporarily participate. Need at least 5 members including seed moderator to start one.

Forums can "foster" a member for a few months until next placement cycle.



PROCESS for FORUM PLACEMENT

- 1 Forum Chair (FC) copied on "Welcome Email" to new member
- 2 FC welcomes new member and ask for New Member Profile
- 3 New Member is Forum Trained
- 4 FC reviews New Member Profile and Forum Profile - looking for alignment with conflicts, geography, retreat philosophy, 5% culture
- 5 FC place new members on a July, October, January and April schedule
- 6 With a potential match, FC provides new member name and company, to forum moderator who has 48 hours to reply if any conflict
- 7 If no conflict, member and forum moderator are introduced
- 8 If there is a conflict, it must be articulated to FC (industry, relationship, or any valid reason)
- 9 If either new member or forum is not happy after 3-6 months, new member may be placed again.