



# FORUM OVERVIEW GUIDE

Welcome to the **Rising Leaders Forum<sup>SM</sup>**—a fun, high-energy, transformational, and life-changing journey. The following information is designed to orient you to all facets of Forum Life. We look forward to taking this journey with you and are committed to making this experience one you will fully enjoy and consider one of your life’s most memorable experiences.

## GENERAL INFORMATION

- Forum Sponsor:** Blankenship CPAs
- Forum Deans:** Tom Moucka
- Forum Year:** January 1 to December 31, 2020
- Forum Size:** 10-14 Rising Leaders Members
- Meeting Attire:** Business Casual

### **Time Commitments:**

- Member Program Meetings:* Average of approximately 8-hours per month
- Other Member Activities:* Average of approximately 4-hours per month
- Parent’s Time Commitment:* Average of less than 2-hours per month

## PRIMARY FORUM ACTIVITIES

### **Best-Practices Workshops | Nine, 4-Hour Sessions | In-Person**

Learn 9 best-practices and innovative solutions for life, family, and business directly from over 10 leading subject matter experts from across the country. Sessions are interactive and involve questioning experts along with other activities to re-enforce the learning process.

### **Strategy Briefings | Nine, 2-Hour Sessions | In Person**

Gain wisdom and knowledge from professional advisors in a myriad of professional fields on topics of importance for success in life, family, and business. Presentations will be focused on familiarity with what leaders and wealth holders must know to make prudent and wise planning and implementation decisions. The session will be interactive allowing for significant time for Q&A. **Strategy Briefings occur immediately after Best-Practices Workshops conclude over lunch.**

## **Practical Application Quests | Nine Experiences**

Apply what you learn to grow personally and professionally while strengthening and bringing tremendous value to your family and business by introducing innovative new concepts, systems, and processes. Each *Quest* will include a self-paced assignment custom designed to your preferred learning style to maximize your overall experience.

### **Life & Business Coaching | Monthly, 1-Hour Sessions | Virtual**

Coaching is provided by your Dean and is designed to help you gain new insights and perspectives, provide unbiased feedback and encouragement, hold you accountable to your commitments, and help you to accomplish your goals leading to success on all levels.

### **Masterminds | Monthly, 3-Hour Sessions | Virtual and In-Person**

This peer networking meeting is where members exchange notes on their learning experiences related to the month's topic—what worked, what didn't, sharing ideas, troubleshooting problems, developing innovative solutions, and get valuable feedback. One member each month will be highlighted to share their *story* and get feedback from the group on any matters of importance. Also, there will be a '*speed peer advice round*' for six members per month who will be given 10-minutes to ask for feedback on any topic of importance.

### **Stakeholder Consultations | 2, 4-Hour Meetings | Virtual and In-Person**

Open communications between generations are vitally important not only for enjoying a better family life but also for the successful operation of a multi-generational family-business. These consultations are designed to bring together the family's adult members, non-family leaders of the business, key advisors, and your Dean. The focus is on understanding which past Forum topics the family and business wish to implement along with understanding which future topics are of most interest. Other matters may be added to the agenda as time permits.

## **FORUM TECHNOLOGY**

To enhance your Forum Experience, you will be provided a cloud-based, *Microsoft 365* Business Essentials license. It will include your own personal Forum email address. You will be provided access to learning resources if you are not familiar with Microsoft 365's collaboration apps, such as *Microsoft Teams*, *OneNote*, *Planner*, and *Yammer*.

### Technology Functions:

- Email Communications
- Individual & Group Chats
- Video Conferencing
- Document Library
- Link Library
- Video & Recording Library
- Calendar of Events
- Meeting Handouts
- Assignment Postings
- Announcements & Alerts
- Member Recognition
- Agenda & Meeting Notes
- Project Management
- Member & Staff Directory
- Articles & Whitepapers
- Worksheets & Checklists
- Questionnaires
- Member Surveys & Polling
- Book Abstracts
- Speaker Bios
- Access to other apps

## MISCELLANEOUS ITEMS

- 2020 Calendar:** Refer to the *RLF Forum Year: 2020 Schedule* for dates and times for all 2020 Forum activities.
- Forum Charter:** At the beginning of February, members will be tasked with creating a Forum Charter. The Charter will reflect the vote of the majority in setting various types of policies and procedures.
- Extra Fun Activities:** Periodically, your Forum Dean will announce a special fun event not on the agenda, some for fun and some for learning experiences. Also, you, as members, may plan gatherings or events on your own.
- Member Opinion** At the end of each Forum Month, members will be asked to complete a **Polls & Surveys:** research poll and member survey. The Poll is for you to provide valuable feedback to your family about the collective thinking of your cohort. The member survey is an opportunity for you to have a voice in shaping your Forum and those we plan for the future.
- Non-Solicitation:** Rising Leaders Forum staff or its guest presenters are not allowed to solicit members or family members for services or product sales. Likewise, members may not solicit one another. Please report any solicitation you receive to your Forum Dean. However, if you request information to be sent to you, the person you contact is only allowed to provide the information you requested and may only follow-up with you on one occasion to assure your request has been fulfilled.
- Attendance Policy:** Members are expected to attend all Forum scheduled activities and to consider such attendance a high priority. A substantial value you receive from attending Forum events is the interactions that occur between members. That said, it is understandable that *"life happens"* and you may need to occasional miss a Forum activity.
- Conflicts in Schedule:** Please notify your Dean any time you have a conflict in your schedule that prevents you from participating in a Forum activity. In some cases, you may be able to attend an activity via video conferencing. Some events may be recorded and posted in the Forum's Video Library for your later viewing. With the approval of the group, times may be altered.
- Troubleshooting:** If you wish to make a recommendation, experience a problem, or are in anyway dissatisfied with any aspect of the Rising Leaders Forum<sup>SM</sup>, immediately contact your Dean or Michael Beduze, the Managing Partner of Da Vinci Global Consulting. Michael can be reached either on his cell at 713.446.0903 or email at [Michael.Beduze@DaVinciGC.com](mailto:Michael.Beduze@DaVinciGC.com).