AFFINITY GROUP LEADER TOOLKIT

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Introduction

Congratulations becoming a ProVisors Affinity Group Leader (AGL)! Welcome to the club!

We created this Toolkit to provide you with a springboard for success. We encourage you to read it in its entirety, so you have a good understanding of the role of an AGL as well as the resources to be successful. We also hope that as you settle into your role, you'll find it helpful to return to specific sections/documents for ideas on how to keep the group thriving.

A bit of additional context about this Toolkit:

- The resources you'll find in this Toolkit align to the most critical functions (and most common challenges) you may face, but they are by no means exhaustive.
- At the end of the Toolkit, you can find an Appendix which contains more "actionable" documents such as templates, activity ideas, a self-assessment, etc.
- We made a deliberate decision to frame this toolkit as "recommended practices" as opposed to "best practices" because there is no single path to your success with the group you lead.
- Working within the parameters of our mission and values, AGLs are encouraged to put their own personality on things; for that reason, you may see different practices "in the wild" than what we've outlined here.

Many thanks to both the GLs and AGLs who contributed their time, thoughts, and documents to the creation of this Toolkit. Their generosity (and yours!) is what makes this community so great. If you have questions or challenges that aren't addressed in these pages, we encourage you to reach out to your Regional Director – they are here to help you succeed!

Overview of Affinity Groups

Affinity Groups meet for two hours each month (typically around lunch time) with the first 30 minutes reserved for open networking. Affinity Groups are designed to provide Members with targeted opportunities to build relationships with other Members working in similar fields or who share similar interests. In addition to providing a platform for creating connections with other Members, Affinity Groups are generally centered around an educational or content-driven agenda. (In some cases, Members requiring continuing education credits for their professions can satisfy them through these meetings.)

Our core set of Affinity Groups include:

- Lawyers and Legal Professionals
- Mergers and Acquisitions
- Real Estate
- Estate and Succession Planning
- Women

In addition, we occasionally will create other Affinity Groups unique to a region based on its Membership or emerging needs. These needs are identified and thoroughly assessed by ProVisors staff. You can find a complete list of all Affinity Groups on the Resources page: "Regions and Meetings at a Glance." Please note, certain Affinity Groups may exist in some regions, but may not be considered in other regions. We do not launch Affinity Groups in a region until we have exceeded 200 Members, and we attempt to maintain a 30% ratio of Affinity Groups to Home Groups.

To foster commerce/connection and create a consistent experience for our Members, we ask that Affinity Groups incorporate these standard elements into their meetings in some fashion:

- Welcome + sharing of the group's mission statement
- Introductions
- Testimonials
- A mission-related meeting topic
- Troikas
- Needs/Deals/Wants
- Announcements of upcoming events, meetings, or programs of interest

Starting a New Group

Once a region has 200+ Members, ProVisors will identify Affinity Group Leaders to slowly start the core groups listed above. Often these groups have been meeting informally, to start to create momentum. When a group is just starting out, our staff will work closely with the AGL to create a mission statement that clearly defines the focus and Membership of the group and define a ramp-up plan to get to the goal of 25+ attendees by the fourth meeting, at which point we consider the group officially "launched." (If a group is unable to generate enough interest during its first three meetings to reach 25+ attendees, we will re-evaluate the region's readiness and potentially table this for later.) The long-term goal of an Affinity Group (a group that is over a year after formation) is to have 30+ attendees at all meetings.

Maintaining a Group

Unlike with our Home Groups, where we measure the number of Members, for Affinity Groups there is no minimum or maximum target for Members. Instead, we focus on attendance, targeting a goal of at least 30 attendees at each monthly meeting. To track attendance, we ask that you take attendance and mark any "no shows" via The Hub (in the Troika Tool).

In addition, as the AGL, you should ensure that the group meets 12 times per year, and that the Members and attendees align to the mission of the group. (As an example, if you lead a Real Estate Affinity Group that is focused on providing its Members continuing education units, it could dilute the focus or create a less-than-optimal experience to allow HR professionals to join.)

Adding Members

As we just shared, your focus is on attendees, not Members. That said, when someone recognizes that they would like to be a regular attendee of the Affinity Group, we encourage them to request membership since it simplifies the RSVP process and gives them opportunity to participate on the Executive Committee. If someone is interested in joining the Affinity Group as a Member, they will need to request approval from you/your EC, based on the Membership qualification standards established as part of the group's charter. In general, anyone who meets the qualifications for the group must be approved. If someone doesn't clearly align to the purpose of the group or you have concerns, please work with the Regional Director to determine eligibility. The RD has the final say on any vetoes. Once you approve someone, you'll need to loop in your Member Service Representative (MSR), who will officially welcome them to the group and make sure their Membership is set up on the Hub.

Approving Guest Requests

When someone wants to guest at the group, they will submit a request through the Hub, and you'll be notified via email. You can approve/deny requests in the Hub under the "Manage My Meetings" tab. If you deny a request, it is important to email the Member and provide a bit of guidance so they can get approved in the future. As an example, if you run a popular meeting that reaches capacity quickly, let them know how far in advance they should submit a request. We don't want people to feel rejected or like Affinity Groups are an inaccessible benefit.

Additional Policies

This should provide enough context for you to get started. In the appendix we have outlined the budgeting and reimbursement process and policies, which you might find helpful to reference once the group is up and running.

What It Means to Be a Great AGL

Now that we're aligned on what an Affinity Group is, how it gets started, and some of the mechanics of maintaining it, let's talk about the magic ingredient that brings this all to life: YOU!

Why You?

We're extremely selective when accepting someone as an AGL because Affinity Groups are a huge part of how ProVisors' Members connect with each other to deepen the process of: "Know. Trust. Like. Refer." When evaluating prospective AGLs, we look for people who are passionate about our mission and have the leadership, organizational and relationship skills to bring it to life in a way that's fun and meaningful for our Members. We create the structure and framework for the experience and rely on you to make it happen.

We've found that while Home Groups are instrumental in providing a "home base" for Members, our Affinity Groups are where Members turn to broaden their networks and learn from other Trusted Advisors within their field or who share similar interests. Since Members may guest an unlimited number of times in Affinity Groups without formally joining, it means the content and connections must be compelling to entice repeat attendance. It takes a special person – you! – to curate a group like that.

As part of AGLs promoting the ProVisors mission, it's important that you model our core values and ensure the group's Members and Guests embody them:

- Members First Mindset
- Personal Accountability
- Mutual Trust and Respect
- Open and Honest Communication
- Safe and Fun Environment

Note: If ever a question or dispute arises in the group, we ask that you reference the Code of Conduct & Policies and Member Handbook or contact your Regional Director to ensure consistency in how our policies are expressed and enforced. These policies are intended to protect our Members and the organization.

What You Get

AGLs have a unique opportunity to build relationships with and among Members and exchange information and business opportunities among one another, thereby promoting and enabling collaboration for the benefit of AGLs, Members and their clients. This allows you, the AGL, to broaden the AGLs business network by being the centerpiece of the group.

The Measurement of Success

As we mentioned before, unlike leading a Home Group, which strives to maintain a certain number of Members, as the leader of an Affinity Group, success is measured by the number of people who attend the meetings. **Our**

ProVisors community expects AGLs to maintain a minimum of at least 30 Members in attendance at each meeting, and to hold 12 meetings per calendar year.

To achieve/exceed this target:

1. Work with your RD to define a clear and compelling mission statement for the group
2. Design engaging educational programming aligned to the mission statement (these meetings should provide an entirely different experience than traditional Home Group meetings)
3. Foster meaningful connections among Members during meetings and Troikas
4. Promote the Group within ProVisors to attract appropriate/qualifying Members to join the group or attend the meetings

This recipe for success is simple – but can be time consuming! In our experience, the single most impactful thing you can do as an AGL to run a successful Affinity Group is build and leverage a committed Executive Committee, because they can help with ALL those items. We'll go into more detail about this in the next section.

Building and Leveraging an Effective EC

You're probably already familiar with a ProVisors' Executive Committee from belonging to a Home Group. (Maybe you've even served on one!) Since it's such a critical aspect of building a successful, engaging Affinity Group, we want to make sure you understand the best practices. We encourage you to build and manage the Executive Committee the way you would inside your own company. We find that the most effective AGLs do the least amount of work – they establish a strong EC and empower them to generate ideas and help to prepare great meetings.

In general, Executive Committees should consist of 6-8 people with clearly defined roles, including an Affinity Group Leader Associate and a ProVisors staff Member. Later in this section you will find a list of Key EC Roles you may want to consider.

For newer groups (less than one year old), the EC should meet after each regular group meeting; after the first year this may reduce to quarterly, but we find that some of our most successful Affinity Groups have ECs that meet more frequently. Your ProVisors Regional Director will attend EC meetings as often as they can to provide guidance. Please make sure to alert them when you are having EC meetings.

Tips for Selecting People for the Executive Committee

- Get clear on which roles are top priorities and what you really need from someone in that role. You should be able to clearly articulate your hopes and expectations before inviting someone to serve.
- Once you're clear on the roles you want to fill and the functions you need performed, think about the desired skill set. (Eg. If you want the Membership chair to manage a spreadsheet and ensure Candidates move through the process seamlessly, you may want someone who is highly structured and has strong attention to detail.)
- Look for people who are already engaged and enthusiastic – who want to be a fellow volunteer – and follow through on their commitments. Create a short-list of these people, then think about their skills and which roles might be the most natural fit.
- Discuss the role with them. Be clear in establishing your goals so they have a clear sense of what the role will entail – and then ask them to honestly assess if they will have the continued interest and bandwidth to deliver.
- As a best practice, when someone accepts a role on the Executive Committee, we suggest that you have an open discussion about what information you need from them and on what sort of timeline, and how you'll hold them accountable and share feedback if you're not getting what you need.

Key Roles for an Executive Committee

Think about which roles are most important for the group. We find that the most effective ECs aren't so large that they're unwieldy (usually around 6-8 people), but some AGLs prefer a "more the merrier" approach since a lot goes into coordinating great programming. If you're on the smaller side, you may need to think about combining some responsibilities under one role. It's important to remember that the local Regional Director is also part of the EC of each group and should always be invited to attend meetings. Here are the most common roles:

- **Affinity Group Leader Associate (AGLA)** – The AGLA is the second in command. This is the person you trust to step-in as proxy to run meetings, who could take over if you're unable to attend a group meeting or an EC meeting. The AGLA should have opportunities to lead meetings and have more leadership in the group then the average EC Member. When choosing the AGLA, it is important to choose someone who is not a GL, AGL, GLA or AGLA of another Home Group or Affinity Group. Additionally, this should be someone ProVisors could consider as an AGL candidate if you needed to step down for some reason.
- **Welcome Chair**: Should be the first person (along with the AGL) to arrive in the room and serve as an ambassador to Members and Guests.
- **Troika Manager**: Utilizes the Troika Tool in the Hub to take attendance and set up Troikas. Creates Troikas with intention and tracks matches utilizing the Troika Tool to ensure everyone gets a chance to mix with as many other Members as possible over the course of their Membership.
- **Testimonial Tracker:** Keeps track of who gives and who receives Testimonials at each meeting. The AGL may find this data useful to track who is participating and being an active Member of their group.
- **Programming Chair**: Proposes topics or activity ideas to the AGL to keep the content portion of the meeting fresh and fun. Once an idea is selected by the AGL, the Programming Chair will plan and organize that portion of the meeting, preparing speakers or activities to ensure they dazzle.
- **Care Chair**: Calls or sends cards to group Members on behalf of the EC or group in general when they have notable life events, such as birth, death, weddings, etc.
- **Social Chair**: Plans and organizes events outside regular meetings. They need to have a knack for fun but also capable of managing the details (securing a venue, signing agreements, working within a budget, driving communication and RSVPs, etc.) that make an event successful.

While each Member of the EC has a specialized area of responsibility, EVERYONE on the EC should consider:

- Promoting the Affinity Group to their Home Group (and other groups where they guest) to drive attendance.
- Generating programming ideas.
- Serving as ambassadors to greet Guests and introduce new Members during meetings.
- Assisting the AGL during a meeting to ensure it runs smoothly.
- Driving commerce among Members: reminding Members to think about how they can give to other Members by making referrals, providing introductions, and serving as a resource; modeling proper testimonials.
- Recommending and deciding local policies relating to the monthly programming.
- Providing feedback to the AGL from the other Members or themselves about items of concern.
- Helping coordinate events and group social activities.

- Above all, the Executive Committee Members are expected to lead by example and demonstrate adherence to the ProVisors Code of Conduct and Policies at all times.

Top Tips for Leveraging + Managing Your EC Effectively

- Delegate effectively – let them own their functional area:
    - Set clear expectations.
    - Communicate the results you need to see (and set explicit timelines).
    - Let them own it – they should feel empowered to run with things.
    - Track and follow-up on their commitments to create a culture of accountability.

- Don't avoid difficult conversations.
    - If you notice someone struggling, ask how you can help.
    - Rotate people off the EC if they're unable to deliver what you need.

- Meet with them regularly as a team:
    - While each person should own their functional area, the sum is greater than its parts, so you'll want to foster a sense of collective community.
    - Create a standing agenda so people know what to contribute.

- Make sure it's fun and rewarding – not just a grind!
    - Express heartfelt appreciation and recognize their contributions.
    - Create opportunities for them to shine in front of the group – making special announcements, or ensuring they're introduced at most meetings.
    - If you notice that a role requires a lot of work (eg. Troika Manager) consider appointing two people to the position so they can alternate and rest.

- Formalize their role as ambassadors for the group.
    - Encourage EC Members to promote the Affinity Group and its events when guesting other meetings.
    - Ask them to email approved Guests ahead of the meeting to confirm their attendance and minimize cancellations and/or no shows.

Tips for Driving Robust Attendance

Give 'em what they come for.

Get clear on why people join or attend Affinity Groups, then design meetings that deliver that experience. We encourage you to develop an active feedback loop so you can understand what resonates uniquely with the group. Some AGLs rely on regular surveys, whereas others hold a closed meeting each year to solicit feedback. It's important to understand what Members <u>do</u> and <u>don't</u> want from the group. From feedback we've received, here is what people are (generally) looking for from Affinity Groups:

- A place to learn from other experts in my field
- A safe forum for discussing issues specific to <identity/role/industry>
- A chance to get to know other ProVisors Members in a more fun/meaningful way
- A sense of community – a chance to find "my people"
- More opportunities to generate commerce
- An easy way to stay current and maintain CEUs for certification requirements

Create quality programming using a variety of formats. *

Unlike our Home Group meetings, which tend to need a lot of time for introductions and testimonials, because Affinity Groups are focused on learning, you have a unique opportunity to put together compelling, in-depth programs. Even so, you'll find that Members have different preferences when it comes to topics and formats, so we encourage you to focus on <u>variety</u> when you and the EC are designing the programming calendar. Planning a few meetings out will help give you time to promote them and create buzz. Formats we've seen work well include: a panel of experts from the ProVisors community, a Guest speaker, small group breakouts to complete a shared project/task or discussion, etc. Don't be afraid to experiment – stay nimble/open and get creative with it!

Develop a reputation.

Our most popular Affinity Groups easily crush their attendance goals because people have such a good time or find such value in the meeting that they not only return, but they also spread the word. These groups develop strong word of mouth and often end up with a long waitlist because the seats are sought after.

Grow the Membership base.

Affinity Groups don't have a Membership goal, but if you notice someone guesting repeatedly, encourage them to become a Member. They'll enjoy a guaranteed seat and the ease of RSVPing for meetings (rather than needing to request to guest) and, since we request that Members commit to attending 80% of the meetings for groups where they are a Member, it will secure a base of attendees for meetings.

Cultivate an active Executive Committee.

As we mentioned earlier, a strong Executive Committee is a key predictor of a group's success. In addition to helping generate quality programming and ensuring a great attendee experience, the EC can help promote meetings and events within their Home Groups.

Market the meetings.

In addition to word of mouth generated by Members, attendees, and the EC, don't overlook formal channels of marketing the group to the broader ProVisors community. We encourage you to promote meeting topics and social events on the Hub and in the LinkedIn communities. For more information on how to do this, reach out to your Regional Director.

Create Community Outside of Meetings.
Beyond connecting at events, some of our most active Affinity Groups have found creative ways to stay connected between meetings. Some groups encourage people to connect on social media, others have established group-specific hashtags so they can find each other and ride together on Peloton. Sending regular email updates that not only promote upcoming meetings but also include links to relevant articles or fun projects that foster a group identity can also be helpful.

* How to Generate Quality Programming

There's no single way to ensure you have a robust programming calendar. Here's advice that one AGL shared with us for how she tackles this:

> *"I have a large EC with subcommittees responsible for planning events and generating ideas to keep it fun. The committees meet on their own time, and I have two weekly touchpoints: one with my GLA and one with the steering committee, whose responsibility is to bring ideas for what we might want to offer/plan both in terms of our regular meetings and our events. We pick a theme each year, then brainstorm with that mind, using trends and timely topics to guide our agenda. Our goal is to keep it fresh and make sure we never recycle a topic. My role is to decide which ideas we want to move forward with, then they run with them."*

Running an Engaging Meeting

Bring your A-Game.
- Be mindful of your energy – your energy will set the tone for the entire group.
- Give yourself a few minutes before the meeting to shift gears and "arrive" so you can be fully present.

Good meetings don't happen by chance - they require planning.
- Be intentional in selecting the structure/format of the meeting – try to vary it from month to month to keep things fresh.
- Make sure the content/discussion topics are relevant to as many people as possible.
- Rely on the EC to review speakers' content in advance, architect the panels and timing, and generally manage that portion of the meeting for you.
- Look at the overall agenda and make sure there is an opportunity for everyone to get their voice heard in the room.

Cultivate a strong sense of community.
- We allocate the first 30 minutes of every meeting, both in-person or virtually, for open networking among Members. In some groups this flows naturally; in other groups it can be helpful to provide an activity (eg.

networking bingo, a discussion prompt, etc.) to make this time more interactive and help people connect with each other. (See the **Meeting Ideas** in the Appendix for specific ideas.)

- Additionally, we find that some of the best attended Affinity Groups are those that really embrace their mission statement and galvanize people using that identity. Think of "spirit week" when you were in school – some groups pick an accompanying "theme" for each month and encourage attendees to dress the part. We've seen hats, team jerseys, concert t-shirts, Halloween costumes, to name a few. It might sound silly, but it creates immediate belonging, provides discussion fodder, and sets a fun tone!

Set clear expectations in advance.

Provide an agenda in advance so participants know what to expect – and what's expected of them. (Indicate what actions you would like participants to take and what you are hoping they will contribute during the different sections.) Tips:

- If you're expecting group participation on a topic (even an icebreaker) send it in advance so people who need time to process can prepare.
- Give people a sense of the time limits that will be imposed on them for introductions or testimonials so they can prepare accordingly.
- If you have a large attendee list and won't be able to do full-group introductions, let them know in advance when/how they will get to introduce themselves to level-set expectations.
- ***Note:*** *you can find a* ***Sample Agenda*** *in the Appendix.*

Get everyone's voice in the room.

- As you review your agenda, make sure you've created opportunities for everyone to participate in some way – whether through an introduction, a testimonial, an activity, or a special role. People attend because they want to be visible.
- For large virtual groups (we've seen some with 90+ people!), think about how/when you can use breakouts so that everyone gets a chance to be heard.

Do the math, watch the clock, and keep things moving.

- Know how much time to allocate to each person and each activity.
- Ask for testimonials before the meeting so you have a sense of how much time to allocate and how you want to handle them.
- Start and wrap promptly.
- Communicate time limits upfront – both when you send out the agenda and during each section of the meeting.
- In a perfect world, you don't want to cut people off or "buzz" them to keep things moving, so tap on EC Members to go first to model brevity and set an example. If you aren't able to create a "concise culture" then you may want to make a timer a fun (rather than punitive) element of the segment.

Establish roles for other people.

- As Ringmaster, try to put on a captivating show – to do that you'll need to enlist the help of the EC and others so you can stay focused on the overall flow and engagement.
- If the group isn't yet good at self-managing time around introductions or testimonials, appoint a Timekeeper and make it clear how they'll help people stay within their limit.
- If it's a virtual meeting, lean on the Zoom Monitor to manage the technical issues so you can be fully present. You should not be admitting people, muting, or unmuting, checking attendance, or creating breakouts – it's a distraction and slows things down.

Solicit feedback – often!

Affinity Groups are all about educating and engaging attendees with great content, so actively create a feedback loop to understand:

- Hot/timely topics with broad appeal to the group
- What types of discussions they find most valuable
- Which events they've found most engaging or fun
- What small tweaks might help take your meetings to the next level

Growing the Group

Build Interest and Engagement.

One of the top questions we get from AGLs is, how do I find people to join the group? We've covered the topics of getting people engaged and returning to your meetings, but here are a few ideas for you to consider in getting new attendees, who may eventually become new Members!

- Make sure the EC and Members are talking about the group in their home group meetings. Sharing when/where you meet and what type of people would be a fit for the group.
- Have them invite appropriate Members to come with them to a meeting. If your content is engaging, and the group is welcoming, they'll want to come back again and again!
- Every month a Newsletter is sent out with our newest Members in each region. Look at the newest Members. Are they a fit for the group? If so, send them a welcome email and invite them to come to a meeting.
- Utilize the LinkedIn Regional pages. If you're a Member of that group (and you should be), you can post content to that page. Share your meeting topics and invite interested Members to attend.
- Guest, guest, guest! Go to other group meetings and talk about the group. You're bound to find Members who are interested in coming to the meeting.
- If your meetings are virtual, it opens opportunities for Members from outside the region to attend. Think about reaching out to other AGLs from around the country and inviting them to participate.
- If you've tried something that has worked, please share it with your RD, so they can help others!

Leading Virtual Meetings Using Zoom

Set “Max Registrations” and close the meeting to Guest requests when you hit it.

- While the goal is to drive <u>at least 30</u> attendees at each meeting, recognize that it isn’t a contest. There likely is a number (above 30) where the group will become unwieldy, so figure out the maximum number of attendees you can confidently create a great experience for.
- If you struggle to support more than 30 attendees in a virtual format, consider shadowing a few of the larger groups to see if you can pick up a few tips – your Regional Director should be able to recommend a few.

Don’t let the virtual format of the meeting change the things that matter most.

- Testimonials are the currency of ProVisors. Make sure you allot enough time to share – this is a critical part of each meeting.
- Make sure the newest attendees / Members feel the love – find time to highlight them.

Be present.

- Appoint a Zoom Monitor so you won’t have to sweat the technical details… let them monitor the chat and handle muting/unmuting so you can keep your attention focused on the Members.
- Keep an eye on the overall energy and dynamic of the meeting. Look for opportunities to engage participants through questions (using chat or asking people to raise their hands so they can be called on).
- Coordinate with the Zoom Monitor on the different agenda items so they know when/how you would like to use chat, hand-raising or unmuting to engage participants and bring their voices into the discussion. Get creative!

Keep people engaged.

- Chop up the meeting time to keep people engaged (introductions three different times, multiple activities).
- Use the Socratic method (asking questions to draw people out) and spot introductions to keep people on their toes.
- Try the polling feature! Quiz people on how much they know about other Members, followed by a discussion.
- Find fun activities. To get started, check out the **Idea Sheet** in the Appendix.

Be mindful of when/how you share your screen.

- People are here to network, so remember that every time you share your screen, you are limiting the number of faces they will be able to look at.
- A screen should only be shared when it is needed to make a point or provide a visual example. Once that is done, stop sharing and switch back to the video-view.

Manage the chat.

- We wouldn’t speak during an in-person meeting, so we shouldn’t be using chat.
- Chat is appropriate for questions and issues but should not be used for banter during the meeting – it can be distracting.
- The Hosts/Co-Hosts can limit the chat functionality in each meeting. If it’s getting out of control, turn it off. *Click here to see how*.

- Consider disabling the “private chat” function at the start of the meeting so people aren’t distracted by chatting behind the scenes.

Have a Troika plan.

- We recommend having the Troika Manager add “Troika Manager” after their name on the Participant List so people can easily find and chat him/her.
    - Note: they can rename themselves by clicking on the “participant” menu at the bottom of the window. It will pop-up a list of all participants. They should then find and hover over their name. Select the button that says “rename” and edit to include Troika Manager.
- Since Troikas usually involve a bit of in-person organization, talk with the Troika Manager in advance and hatch a plan for how you will handle this virtually.
- A few options:
    - Pre-plan Troikas. In the email sent before the meeting, ask attendees to email the Troika Manager with requested Troikas (don’t forget to send the Troika Manager’s email address out in the cover letter). The Troika Manager can set up the Troikas in advance. They can use the participant list with the Troika Tool to realign on the day of, if someone doesn't show up.
    - Ask anyone who does NOT want to be placed into a Troika to email the Troika Manager. The Troika Manager can preset the Troika’s using the Troika Tool (and adjust them for no-shows during the meeting).
    - Do “Instant Troikas” using the breakout room feature immediately after your meeting.
- You can be creative! Try something new - and if it works well, please share with us so we can continue to update our community with great ideas!

Appendix A: Preparing to Lead Worksheet

Instructions: Now that you've heard OUR vision and what it takes to have a great group, it's time for you to give some thought to how you'll execute on that and make it your own! Reflect on the following questions (and/or discuss with the Executive Committee), then share your thoughts with your Regional Director.

- In what ways can you leverage your role to leave Members feeling inspired?
- What can you do to ensure you show up to every meeting and Member interaction with amazing energy?
- A successful group requires intention and design. When will you set aside time each week or month to attend to the success of the group? What will you do with that time?
- What can you do, or what help might you need from Members of the Executive Committee, to ensure:
  - The meetings run like clockwork?
  - The meetings feature interesting, meaningful content each month?
  - Everyone gets a chance at the mic in the meetings?
  - People have FUN in the meetings?
  - Testimonials are concise and meaningful?
  - People walk away with a valuable new connection or friend?
  - New Members and Guests quickly feel a sense of belonging?
  - The group maintains healthy attendance (30+ per month)?
  - People find value in and rave about the Affinity Group you lead?
- When you read through all that successful AGLs do …
  - What feels like it will be EASIEST for you to deliver based on your strengths?
  - What feels like it will be most CHALLENGING?
  - What's your plan to leverage others to help offset those challenges?

Appendix B: Sample Affinity Group Meeting Agenda

Group Name + Date of Meeting

Read the Affinity Group's mission statement

Agenda **times are suggestions/approximations, assuming a lunch meeting timeline*

11:30*	**Arrive & Network** You may want to come up with a discussion prompt relevant to the meeting topic then create groups of 4-5 people to discuss that prompt for 10-15 minutes to get to know each other, or you may want to try a game like "networking bingo" with multiple rounds of breakouts.
12:00	**Announcements + EC Introductions** ● List the Executive Committee on the agenda (name + role). ● Have different EC Members introduce themselves + share a brief (1-2 min) update that's relevant to the group (eg. upcoming meetings/social events, promoting a social media group, etc.), special introductions.
12:10	**Testimonials** Depending on the number of attendees, Testimonials may be limited to only attendees in the room.
12:30	**Panel/Presentation/Activity** Introduce the topic and share the format/timing so people know what to expect.
1:00	**TBD – depending on the topic, may be used for:** ● Q&A for the panelists/presenter ● Breakout groups for attendees to discuss the topic in more depth
1:20	**Wrap-Up** AGL puts a bow on the topic of the day
1:25	**Needs/Deals/Wants**
1:30	**End Meeting/Place People into Instant Troikas**

Appendix C: Meeting Activities – Warm-Ups

Ideas Collected from Various Group Leaders

Here are some ideas that Affinity Group Leaders use to keep introductions fun and engaging, compiled with the help of various Group Leaders. You may want to borrow/tweak some of these for the initial 30 minutes of free-form networking in the Affinity Group.

Activities – In-Person or Virtual

Meaningful Photograph
In advance of a meeting, ask each Member to email a photo of themselves that depicts them doing something they love to do, a family photo, a high school picture, enjoying an extreme activity, etc. The images are shared to the group and everyone needs to guess which of their fellow Members are in the photo. See who gets the most correct. After everyone has had a moment to guess, one by one, the Member in the photo talks about the significance behind the photo.

Jack and Jill
Start the activity by saying "Jack and Jill went up the hill, fell down and....." Select someone and they add the next sentence to the story. Try to imagine a great order based on the professions in the group. For example, the first storyteller may be a personal injury attorney who says "So the parents called me, sent the medical records and we learned they tripped over a brick", next point to the Insurance person in the group, "so it turns out that the company had insurance......" and so on. Each person adds to the story by applying their professional skill set. Boosts creativity and fun as each Member adds to the story.

Meaningful Song
Ask Members to email their favorite song to one contact in the group. The contact downloads snippets of each song to a media player. In the meeting the snippets are played. First - Name that Tune, Second - guess which Member is associated with the song and Third - Have the Member tell everyone why that song is meaningful to them.

Stick Figure
Each Member takes a quick minute to draw a stick figure depicting what their profession is. Very simple and creative. The group is shown each figure - Members guess the profession. Then the Members describe what the picture intended to show and adds a nickname to the drawing.

Myth Busters
Each profession has commonly held misconceptions. Each Member makes a short list of 5 items - 3 myths and 2 truths. The group must guess which items are myth and which are real. Each Member can take a moment to address the misconceptions.

RSVP Scramble
Take the photo-list and separate the photos from the descriptions. Let the group try to match the photo with the right description. See who makes the most matches!

Member Jeopardy
Read Member descriptions out loud and have the group match the description to the Member. A great way to see if the Member's message clearly reflects their personal brand. Play Jeopardy music for added fun.

Family Feud

Affinity Group Leader puts a selection of questions together (about Members using information from their bio) in the format of a favorite game show and then creates teams to go up against each other.

Thanksgiving
Request Members to send in a picture that reflects something they are grateful for. Sometimes it's something wonderful and sometimes it's a struggle that was overcome. Transformational life events. Very emotional.

7 Words Distill
What you do in a 7 word pitch! Very funny.

Open Up
Each Member talks about their Biggest Failure and what they learned from it. An exercise in vulnerability and insightfulness.

The Hot Seat
Pass out numbers to all Members. Randomly choose a number and that person is now on the Hot Seat. Pre-curate a number of 'get to know' questions and have the Member answer a randomly selected question. This exercise helps to learn more insight about each Member.

Are You Smarter Than a <Fifth> Grader?
Invite a young relative (ideally someone between 11-13) to the introductions portion of the meeting. Tell Members they have 30 seconds to introduce themselves and explain their profession in a way that this 11yo Guest can understand. After each introduction, the young Guest can give a thumbs-up or thumbs-down if they understood what the person does for a living. Keeps it moving and forces people to find simple, funny ways to explain what they do.

Press Release
Invite a PR professional to the group. Breakout in small groups and help each other write a short Press Release. Share with the PR professional for feedback. (If you do this in a virtual meeting, you'll need to use Zoom breakout rooms.)

Additional Introduction Prompts - In-Person or Virtual*

Instructions: *Pick one and send it in advance of the meeting so people can reflect and form their thoughts. Let them know how much time they'll have to answer so they know how brief to keep it – and what else you'd like them to include: eg. "Share your name, business and specialization, then respond to this question. Each person will get about two minutes in total." If you have a lot of people attending or if you choose a topic that's likely to elicit a longer response, consider using breakout rooms.* *Source: Prompts created by GL Richard Clayman

"The worst thing you write is better than the best thing you didn't write." Tell us briefly about the best thing you haven't yet written, or, alternatively, the best (or worst) thing you have.

The Dalai Lama wrote in his autobiography, "I found, as every teacher does, that there is nothing like teaching to help one learn." Briefly share one thing which you've learned through teaching, either students, your children, your employees, or elsewhere.

I’ve been reading a lot of books lately, and find something pleasantly nostalgic about the one that’s not on my phone or iPad, but rather real paper pages. Tell us briefly about something you fondly recall from your younger days, which seems to either be gone – or is going to be gone – soon.

Briefly share a favorite story your parents or siblings always tell about you. Nothing political, and modesty not allowed.

As a basketball coach starting his career, my son has been navigating difficult but typical waters. He’s far more knowledgeable than some of those over him, but it’s a competitive environment, and he has to pick and choose when and where to contribute for the good of the team. Each of us has had moments when we’ve decided to speak out beyond our pay grade. Briefly describe a time you’ve taken the leap to speak out in your life and the results.

A moment in your early life which defines something important about you today.

The rain can be distressing – driving, the cold, leaky roofs. But the payoff is in brilliant days, green hills, and stunning flowers. Tell us about how a ‘rainy day’ turned out to be beautiful for you, either personally or in business.

How you met your best friend (other than spouse or significant other) and what made it stick. What quality does that friend possess with which you would like to be better?

We’re a week into Spring, traditionally a time for cleaning after the long winter. If you were to pick one thing to clean up in your world this Spring – business or personal – what would that be?

Novelist/essayist Arthur Koestler, in The Act of Creation, wrote, “True creativity often starts where language ends." Tell us briefly about one thing you do to underscore what kind of person you are, which doesn’t involve the written or spoken word.

Activities – In-Person Only

Cinco de Mayo
Place 3 sombreros on the floor next to each other and then create an outer circle of Members. Each sombrero has trivia questions in them (questions should rotate) and if a Member tosses a coin into the hat and answers the trivia question, they win a prize.

The Envelope
Break into groups of 6 or 7. Give each Member an envelope and have them write their name on the outside. Everyone passes the envelope to the left. Using Post-It notes, each Member writes one word on the note that they feel best describes the person listed on the outside of the envelope and then places it in the envelope. Pass the envelope to the left. Continue to leave notes in each envelope until your envelope returns to you. Take a moment to read and reflect on each word in your envelope. Take the one word you appreciate the most and share it with the group. This exercise helps Members measure how others see them and to gauge whether they need to work on their outward persona.

The Penny

Gather a handful of pennies (find ones with appropriate dates that all Members can relate to) and scatter them around the room on seats, tables, etc.. Each Member should select a penny and when called upon, talk about what was going on in their life during that year. Good, bad, interesting.... and personal moments are shared. Many memories are shared and everyone gets to know each other a bit better.

Fortune Cookies

A fun activity in January/February (so it corresponds with the Chinese New Year) is to bring fortune cookies for each group Member. Place one at each seat. When the meeting starts, instruct people to unwrap and crack the cookie but not open it or read the fortune yet. Then when you're ready for introductions, go around and ask each person to introduce themselves, then quickly open the cookie, read the fortune out loud and say the very first thing that occurs to them.

Charities

Members at the meeting contribute funds to a 'pot.' Go around the room and each person talks about a charity that is important to them and why. All business cards are also put in a pot and one is selected. The funds collected are donated to the charity of the Member whose business card was chosen. Wonderful way to learn more about each Member and a charity.

White Elephant Book Exchange

Each Member brings a book that has had a meaningful impact on them. Choose a random order for Members to select the book that they would like to have. The Book can be 'stolen' up to 3 times by other Members. If 'stolen', the Members who had to give up their selected book get to choose another book. This continues until each Member has a new book to read.

Appendix D: Zoom Breakout Ideas

Ideas Collected from Various Group Leaders

There are ways we can creatively leverage Zoom's breakout rooms to make our virtual meetings more engaging and foster meaningful connections. (If you're new to breakout rooms, watch this brief video to see how to establish and manage them.) Once you understand the technology, here are a few activities you might want to use breakout rooms for.

Choose Your Own Adventure

To simulate real life open networking where everyone chooses who they want to talk to, come up with some preset topic options and ask people to chat in their preferred topic – then create the breakout rooms based on what people have selected. (You might have multiple breakout rooms on the same topic if it's popular!) Some ideas for the topic offerings:

- Fun: Name that Tune, Trivia, Gossip, General
- Fun: Movies, Concerts, Theatre
- Fun: College Sports, Professional Sports, No Sports
- Fun: First Job, Worst Job, Dream Job
- Professional: Lessons Learned, Current Challenges, Goals & Aspirations
- Professional: Needs, Deals, Wants

Networking Bingo

Before the meeting:

- Use this link to create customized categories for the Bingo card. (Note: it's free for up to 30 people and only $10 total for up to 100 players.)
- Provide everyone with instructions to generate and download/print a Bingo card for themselves before the meeting.

Create a slide with rules for Bingo to share on your screen during the meeting so everyone is clear on how to play and how to win. (eg. It's important to clarify that they can only use one person one time on their bingo card, so they'll need to be strategic.) During the meeting, you'll drop 3 people into breakout rooms of 3-4 minutes each. Rotate them into as many breakouts as needed until someone gets Bingo. If someone gets Bingo quickly, you can switch the game to blackout and give people a few extra minutes in each breakout to share more details with each other.

Unbroken Chain - How Else Might We Have Met?

Drop 4-5 people in a breakout room and give them 15 minutes to complete this task. The goal is for them to create an unbroken chain of how they are connected outside of ProVisors and its Members. As an example: "John worked for Hart & Hart law firm, and the partner (Don Hart) is one of Mary's clients. Mary graduated from Cornell, where she had the same B-school advisor as Bob. Bob…"

More Extensive Introductions

If you have too many people in the meeting to cover introductions with the full group, use breakouts to provide people with a chance to introduce themselves and connect with a few other Members. When you use it in this instance, we recommend putting more people in each breakout (6-8), giving them clear instructions with regard to how much time each person gets the floor and a discussion prompt to respond to.

Small Group Discussion
When you use a portion of your meeting for a presentation or panel discussion, create a few discussion questions then send people off into small breakout groups (3-4 people) for 15-20 minutes to continue exploring the topic. When you do this, consider using chat to post the questions/instructions so people are clear on how to use the time and what to discuss.

Speedy "Troika Consulting"
Drop three people into a 15 minute breakout. Ask them to identify who has a challenge they'd like help with – this person becomes the "client" and the other two people are the "consultants." The client then has a few minutes to share their challenge while the consultants listen. After that, the consultants can spend a few minutes asking clarifying questions. The consultants then offer their advice and recommendations, while the client sits quietly and takes it in. To wrap things up, the client can share what they heard that seemed most helpful or valuable.

Instant Troikas
Since people are unable to get together for their Troikas, one time-saving tip is to wrap the meeting by sending people off into their Troikas using the breakout rooms. They might stay for five minutes to schedule their actual Troika, or they can stay on and have their Troika right then. Note: whoever is hosting the Zoom meeting will need to keep the meeting open until the Troikas are finished, so be sure to set an "end time" for people who decide to Troika after the meeting. To save time, you can have the Group Monitor build out the Troika assignments in Zoom's breakout menu before the end of the meeting (assuming you don't have other breakouts in that session).

Appendix E: How Effective Are My Meetings?

A Self-Assessment for Affinity Group Leaders

Instructions: Assess yourself honestly so you can identify where you may have an opportunity to improve the effectiveness of the meetings. We've structured this around the three pillars of effective meetings (Organization/Planning, Time Management, and Engagement) to help you look for patterns so you can address your greatest opportunity. After completing this assessment, review your results and choose ONE thing you can work on that will impact the meetings.

ORGANIZATION & PLANNING

	Never		Always		
Meetings are thoroughly planned in advance.	1	2	3	4	5
I regularly meet with the EC and AGLA to generate content ideas.	1	2	3	4	5
The EC is largely responsible for planning group meetings.	1	2	3	4	5
We take a hands-on approach to preparing speakers/presenters.	1	2	3	4	5
I send a meeting agenda in advance so people know what to expect.	1	2	3	4	5
We regularly solicit feedback and meeting topics from attendees.	1	2	3	4	5

TIME MANAGEMENT

	Never		Always		
We start on time and wrap promptly.	1	2	3	4	5
People are succinct with their introductions/testimonials	1	2	3	4	5
I'm confident stepping in as needed to keep things moving.	1	2	3	4	5

ENGAGEMENT

	Never		Always		
The meeting format varies each month.	1	2	3	4	5
We experiment with different tools/technologies/activities to drive engagement.	1	2	3	4	5
I hear positive feedback on activities on or after the meeting.	1	2	3	4	5
I let other people handle the technology so I can be fully present.	1	2	3	4	5
I notice when people have disengaged and am able to bring them back.	1	2	3	4	5
We create ample opportunities for attendees to interact with each other.	1	2	3	4	5

Appendix F: Budget Guidelines & Related Policies

Each Affinity Group receives a modest annual budget to add additional value for the Members. Budget guidelines are reviewed annually and shared with you (the AGL) by our Events Team at the beginning of each year, along with the group's specific budget amount. This money must be used by December 31 – any unused funds will NOT roll-over to the following year.

If you (the AGL) has delegated the budget usage to an EC Member to manage, you should ensure the EC Member is: a) using the funds in a manner that is consistent with these guidelines; and b) submitting receipts for reimbursement based on the terms outlined below. ProVisors will only provide budget updates/messaging to AGLs.

Budgets are based on the average number of attendees at each meeting as documented here:

- 0-19 Members = $500
- 20-29 Members = $750
- 30+ Members = $1000

Acceptable Budget Expenses:

- Educational content or Guest speakers for the group
- Happy hours or hosted events at a Member's home to bring the group together
- Joint event with another Group
- Meal expenses – only for Executive Committee Members, and AGLAs. These meal expenses should be limited to a reasonable amount. The majority of the budget should be utilized for programming or social activity.
- Gift cards may only be purchased for speakers and special Guests only - gift cards may NOT be distributed to group Members or EC Members:
- Gift cards are purchased in $25 increments.
- Again, Gift Cards may NOT be purchased for group Members or EC Members

Unacceptable Uses of the Budget:

- Financial contributions to charities and/or charitable events.
- General gifts or gift cards for current Members or relatives.

Social Budget Reimbursement Procedures:

- Receipts must be submitted to ProVisors within 30 days of when the expense was incurred to be eligible for reimbursement.
- Events must occur by December 31, and receipts received by December 31 of the calendar year. There is no budget carry over or pre-paying for January events.
- Events must be posted on The Hub and attendees must be registered via the Hub (to track registration) to qualify for reimbursement. Use the Group Social Checklist to have the event posted and allow 2-3 business days for processing. (Please take that timeline into consideration when making a request.) *Use the link to complete the form: https://share.hsforms.com/15OPJlmCNSIyzTc24L7sFJA4y1my*
- Any items determined to be appropriate/approved expenses will be posted against the group's social budget and processed for payment within 15 days of receipt.

If you would like suggestions or clarification about how the budget can be used, please contact your Regional Director to discuss prior to using the budget.

Other Important Terms

- You may reach out to our Events Team to check the group budget.
- Group budgets are reviewed at the end of December and the end of June, based on attendance.

