

## Peer to Peer- Guiding Principles

### Peer group description

- Facilitated, self-governing, strategic gathering of company leaders willing to share their backgrounds, skills, industry experiences for the purpose of identifying/developing strategies, solutions and/or best practices for personal, professional or business development.

### Meeting Frequency per year

- Four (4) in-person meetings and a minimum four (4) follow up telephone conferences

### Meeting Locations

- 1<sup>st</sup> meeting – WMC (Puerto Vallarta) February 2020
- 2<sup>nd</sup> meeting – Participant host city May 2020
- 3<sup>rd</sup> meeting – Participant host city August 2020
- 4<sup>th</sup> meeting – EXPO (Baltimore, PA) November 2020

### Cost to participate

- \$6,000 for TCIA member (per year)
- \$7,500 for non-members (per year)

### Application fee

- There is no application fee

### Travel costs

- Peer group participants are responsible for their own transportation and lodging [note: the Peer- to-Peer group fee does not include EXPO or WMC registration fees]

### Meeting Length

- The 1<sup>st</sup> and 4<sup>th</sup> meetings will be a day and a half. The hosted meetings will typically be two days to allow for host company tour. Each conference call meeting will be approximately one hour.

### Meeting content

- The group will determine the structure and different topics. Typically, the meetings will cover personal development, company development (such as business growth, profitability benchmarks, exit strategies), HR issues (such as employee development, succession planning, employee motivational strategies, etc.).

## **Confidentiality**

- **Confidentiality is essential.** Each member will be required to sign a non-disclosure agreement. Participants will be expected to share confidential documents with fellow participants in the normal course of meetings.

## **Participants in each group**

- 6 to 12 participants per group

## **Business size, revenue or number of employees**

- A prospective participant will be expected to complete an application and have a discussion with the group facilitator prior to placement into an appropriate group.

## **Rules governing the group:**

- The group is self-governing, so the group will vote to determine any mandatory rules for all participants, the structure of the meetings and the agenda for each meeting.
- Participant will be in a leadership position at his/her company
- There will be only one individual from each company who participates in a group.

## **Length of the commitment:**

- Participants are expected to commit to the Peer-to-Peer for a minimum of a three (3) year period in order to get the ultimate benefits and to maintain continuity of the group.
- A participant may withdraw from the Peer-to-Peer group at any time, however refunds on the annual fee are not provided. Participants withdrawing from a group are kindly asked to a minimum 90-days' notice of intentions.
- There is no maximum term limit for participation, however, please see the "Periodic Review" section.

## **Periodic review:**

Participants agree to a periodic review of their placement in the group and agreed to abide by any recommendations resulting from that periodic review. After review, the facilitator, in consensus with TCIA staff, may recommend transfer of the participant into a different peer-to-peer group or an end to participation in a peer group. The recommendation may be based on, but are not limited to: appropriate level of participation, level of commitment, appropriate group, personal and group dynamics, etc.

**I agree to abide by the Peer-to-Peer Guiding Principles:**

**Peer to Peer Participant:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**Peer to Peer Facilitator:** \_\_\_\_\_

**Date:** \_\_\_\_\_