



VAIL LEADERSHIP ALLIANCE

ROUNDTABLE

INSPIRING PURPOSEFUL LIVING & LEADING



CEO RoundTable group members at the Chateau at Beaver Creek

A GROUP OF TRUSTED PEERS

A small group of peers who meet regularly to advance their understanding and application of purposeful living and leading. RoundTable members help one another by applying the proverb “iron sharpens iron.”

You may have heard of similar groups based in various communities around the country. While the RoundTable is similar to some of these other groups, there are several important distinctions. First, our groups are smaller in size (7-8), creating a more private and confidential environment that gives more personal attention to each member. Second, we focus on helping each person clarify or uncover their purpose, as

well as providing practical approaches to each member's specific challenges. Finally, we use a proven methodology called **Inside First**[®] developed over 15 years by the Vail Leadership Alliance (previously the Vail Leadership Institute) and long-time practitioners in the fields of personal development, coaching, and leadership.

HOW DOES IT WORK?

An appointed mentor and sponsor in conjunction with a local RoundTable coach-facilitator bring together a small group of non-competing peers. While they learn and grow together, members act as trusted collaborators on life's challenges. These peer learning groups jell in an introductory three-day retreat that launches the year-long process.

Groups generally meet monthly for multi-hour gatherings to further develop their own perspectives. Approximately half of each monthly session addresses various life principles such as values, purpose, vision, and strength. In addition to discussions of purposeful living principles, a group may address a specific challenge brought forth by a member of the group in an open forum case study (sometimes called the "hot seat"), where members can share ideas on the topic and provide feedback. Groups may also meet in order to stay connected or hear from outside speakers or subject-matter experts.

Over the course of the year, the coach-facilitator will meet with each member individually once per quarter to help advance their growth.

Monthly meetings are scheduled based on member availability. We encourage participants to get to know all



the members, as each member is a resource that may be able to help solve a problem or seize an opportunity in the future.

See below for a high-level annual agenda.

WHO SHOULD PARTICIPATE?

People seeking to live more purposefully or seeking greater clarity on what's next in life or work transitions. People can come from any organization, sector, industry, or situation. Some RoundTables may offer specific focuses (e.g., early-career, CEO, midlife, or retirement transitions).

The first two RoundTable participants are asked to find two additional members, if possible, from non-competing organizations.

PROGRAM FEES

- Tuition of \$2750 for the year-long program either paid by a sponsor or by the participant (Needs-based scholarships may be considered. Contact the Vail Leadership Alliance via the contact form or email to find out more)
- A separate required Meals & Material fee of \$250 per year per participant
- A required deposit of \$500 at time of registration
- Outside conferences, webinars, and any travel or lodging are extra

ROUNDTABLE PROGRAM BENEFITS

- Draw from an objective “board of trusted advisors” that develops into a network of go-to people to help with personal and/or organizational challenges, solve difficult problems, and gain clarity about what's really important
- Gain insight into purposeful living perspectives founded on the Inside First[®] framework
- Gain an awareness of developing trends in leadership and the community, learn new ideas, manage change and transitions, and improve decision making

- Develop new and enriching relationships
- Create a clear and compelling vision for your future, providing a roadmap to significance



Buck Elliott's RoundTable of environmental stewards

PREVIOUS ROUNDTABLE GROUPS

Previous RoundTable groups and mentors have included:

- 1) **CEO RoundTable** (Raj Manickam, CEO, SteamMaster)
- 2) **Governmental Leaders RoundTable** (Mark Miller, Vail Fire Chief)
- 3) **Young Entrepreneurs RoundTable** (Bob Vanourek, five-time CEO and author)
- 4) **Women's RoundTable** (Pam Horan-Kates, Realtor)
- 5) **Environmental Stewards RoundTable** (Buck Elliott, Paragon Guides)
- 6) **Nonprofit Executives RoundTable** (Tom Moorhead, District Court Judge)
- 7) **Business Leaders RoundTable** (Dick Gyde, retired corporate executive)
- 8) **1st Responders RoundTable**
- 9) **Emerging Managers RoundTable** (Matt Medeiros, investment executive)
- 10) **Business & Non-profit Executives RoundTable** (John Horan-Kates)
- 11) **Business & Non-profit Executives RoundTable** (Jon Strickler)

ANNUAL AGENDA

Each RoundTable begins with a three-day retreat to introduce the group to each other and to the fundamentals of the Inside First® framework. The retreat agenda includes:

- **Overview of Inside First®:** The Alliance’s philosophy and approach
- **LifeLines:** Each individual’s story of defining moments and lessons learned
- **Values:** An articulation of one’s core values
- **Purpose:** An identification of one’s direction and essence—one’s “why”
- **Vision:** A clear picture of the future you desire
- **Personal Life Plan:** A management system of goals by roles

Following this retreat, each group will meet for a multi-hour session about once per month over the course of a year. The goal is that these groups will stay connected for years!

“Don’t ask yourself what the world needs. Ask yourself what makes you come alive, and go do that, because what the world needs is people who have come alive.”

Howard Thurman



PEOPLE INVOLVED

A typical RoundTable will involve various people at different stages of the program, including an elder mentor, sponsor, and coach-facilitator.

MENTOR/SPONSOR

Each RoundTable will include a carefully selected mentor who will work with the group throughout the 12-month program. They will share their experience and act as a trusted resource for each group.

The mentor plays an essential role in the formation of each RoundTable group. They have a vested interest in the success of the group that they helped develop and are vital to the successful recruiting of other participants. The mentor is asked to recruit the first two RoundTable participants if possible. They help the coach-facilitator organize meetings and encourage attendance. Mentors can receive support and training on the

Inside First[®] framework, facilitation, and coaching, if desired. Mentors often grow roles with deeper involvement in the RoundTables in the future.

Sometimes the mentor and sponsor are two different people, while other times one person can play both of those roles. The ideal sponsor donates \$10,000 to underwrite the RoundTable.

When a RoundTable loses a member for whatever reason, the mentor or sponsor may find a quality replacement agreeable to the entire group if it's not too late in the process or deemed to be disruptive to group cohesion.

COACH-FACILITATORS

Our coach-facilitators have been carefully selected and are ultimately certified by the Alliance. To become a coach-facilitator, you must have considerable experience, exhibit a thorough understanding of Inside First[®], and have an established network within their community. Additionally, they must also possess the gift for uncovering the talents, lessons learned, and passions of the members.

Coaches include:



John Horan-Kates

John Horan-Kates, our initial coach-facilitator, has over 50 years of business and community leadership experience in major organizations. After serving as Vice-President of Marketing for Vail Resorts, John started the Vail Valley Foundation, and then launched the Vail Leadership Institute. Also, he served as Founding Chair of Vail Christian High School. Drawing on these and other experiences, he sheds light on the practice of purposeful living in community and organizational situations. He received a Master Coaching designation from the Hudson Institute in 1998.



Jon Strickler

Jon Strickler, also a Vail Leadership Alliance board member, is a local certified facilitator. With over 30 years of experience creating executable strategy at 50 companies across four continents, Jon now runs a Vistage CEO program in the Vail Valley. He is a graduate of West Point, having served five years in the US Army, and holds 4 USA Cycling National Championship titles.

Some Testimonials from Previous RoundTable Participants

“The retreat was profound – I came away with an understanding of my core values, calling and purpose in a way that had never been revealed previously, despite my quest for transformational leadership for dozens of years prior. To say it was, and continues to be, life changing is an understatement. The focus was on integrating head and heart. Without question, every RoundTable meeting I attended with my trusted advisors was invaluable in my personal and professional journey. Our “Hot Seat” sessions proved to be as good as it gets, with honest, candid feedback, and thoughtful consideration as we each encountered challenging issues, individually and organizationally.”

– **Mark Miller, Vail Fire Chief**

“Stepping away from the daily grind and disconnecting is something we all need to do, and probably now more than ever. This program has not only allowed me to do that, but also to dig down deeper into myself than ever before to find more strength, power, and wisdom than I thought I had! It has been a breath of fresh air and a means to realizing the strength of small groups and that thought-provoking conversation the old-fashioned way can still be had.”

– **Laura Emrich, Regional Sales Manager, Advanced Exercise**

“The retreat was just priceless for the opportunity to take a break out of our days and to reflect on what matters the most in life (where we’d like to be and how to get there). The weekend was priceless for me to learn and connect from others and hearing their stories and how they faced the issues that they were up against. I am looking forward to a rejuvenated group moving forward and making a significant difference in the

community together. As always, I walk away from one of those weekends feeling like I'm on fire. Thank you for creating that feeling and supporting it."

– **Seth Ehrlich, Executive Director, Snowboard Outreach Society**

"I have thoroughly enjoyed the company of each and every participant in the RoundTable. I have learned much, appreciated the camaraderie and the wonderful insights that each person has provided to me and my business. Listening, learning, and experiencing the different viewpoints was so very rewarding. The RoundTable was a very worthy endeavor—actually priceless."

– **Linda Hill, President, Hill Aveium Marketing**

"I appreciated the chance to meditate and reflect on my life and to slow down to enjoy God's creation in a wonderful setting."

-**Riz Shakir, Entrepreneur**

"I can't tell you how much I have enjoyed each of you, your insights, and your friendship. The RoundTable is such a valuable concept and gave me a chance to explore business problems and situations that I couldn't with anyone else. You are an exceptional group of people, and I do hope to reconnect with Vail Leadership Alliance in the future. So, thanks to each of you. I will truly miss meeting with you."

– **Jeannie Malato, General Manager, The Chateau Residence Club**

FREQUENTLY ASKED QUESTIONS

How are the monthly topics chosen?

Monthly topics and materials are drawn by the coach-facilitator from the Alliance's library of Inside First® resources. In addition, the host of each month's meeting will pose a challenge they are dealing with and seek counsel from the group.

Where are the meetings held?

RoundTable meetings are held in supportive environments or even at the homes of participants. In select situations, the monthly sessions may be held online via Zoom.

What if I am unable to attend a scheduled meeting?

While we'd like to say the meetings are mandatory, we all have other obligations. The success of the group depends on the commitment of its members. Members should put the regularly scheduled meetings in their calendar for the year. We request that participants try to make these meetings a priority. In case of emergencies or major events that cannot be rescheduled (i.e. graduations, weddings, etc.), we ask that you notify the mentor and coach-facilitator of your absence as soon as possible prior to the meeting. After three (+) missed meetings, the mentor may check in with you to see if you're still able to commit to the group and the process. If you're relocating and can no longer be involved, inform the coach-facilitator so the search for a new member can begin if desired.

Is it possible to bring in new members?

The Alliance discourages groups over eight as larger groups can make dialogue more difficult. However, if the group is at less than eight members and is interested in bringing in a new participant, a new member may join if the group approves and the new participant feels this is the right group.

Can outsiders attend the RoundTable?

Group speakers are the only other individuals invited into the RoundTable. Outside observers are discouraged. The collaborative approach means members act as a trusted sounding board for one another. Outsiders may disrupt the atmosphere needed for open communication.

ABOUT THE VAIL ALLIANCE

The Vail Leadership Alliance (formerly the Vail Leadership Institute) was conceived when a group of community leaders discussed the social and personal challenges that have evolved out of the pandemic. This shift provided opportunities for individuals to embrace transitions in their life and reassess and discover a more purposeful way of living.

The Alliance inspires purposeful leading and living and helps people manage life's transitions, including the inner work of developing more clarity and self-awareness and the outer work of contributing to communities and the world.

Alliance programs, both online and in-person, include events and symposia as well as RoundTables. The Alliance also develops partnerships with other organisations including joint events and the promotion of purposeful living.

FOUNDERS

Most of the Alliance founders either live in Vail or have extensive experience running organizations in the Vail Valley. We know this place well. There is a small but committed working group driving the re-launch. Beyond John Horan-Kates, the group includes, Art Currier, a former business executive and sustainability champion (508-243-5273, artcurrier40@gmail.com); Buck Elliott, a local business owner and entrepreneur (970-926-2000, buckelliott8@gmail.com); Richard Leider, a best-selling author and speaker and our Purpose Ambassador (612-845-8686, richardleider@me.com); Terry Minger, a former Vail Town Manager and foundation executive (303-919-6379, terryjminge@gmail.com); Sarah Smith Orr, a Ph.D., life coach, consultant, and professor (818-516-2011, orrss@me.com); and Gregg Vanourek, an award-winning author and executive training, teaching, and speaking in the U.S. and Europe (720-526-4076, gregg@greggvanourek.com). Each of the founders has extensive experience in personal development: Most are experienced retreat facilitators and coaches, many with over forty years of experience.

FOR MORE INFORMATION

Contact John Horan-Kates at JohnHoranKates@gmail.com; 970-306-3276. And check-out our website at www.VailLeadershipAlliance.com