

VisionCircle™ Foundation

Initiator's Kit – Guide for Those  
Starting a VisionCircle

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## 1.0 Read this first

The VisionCircle concept is a simple one that does not take long to understand. But understanding the concept does not mean that one understands what needs to be done or how to “make it happen”.

This guide is designed to help those people wishing to commence a VisionCircle, and once established, to then develop a rhythm and momentum that is enduring.

*An Initiator is the person whose idea it is to start a VisionCircle, and who takes it upon himself or herself to orchestrate at least the first meeting.*

The objectives of this guide are to:

- Provide Initiators with a “how to” guide to start a VisionCircle
- Help Initiators plan and run the first and subsequent VisionCircle meetings
- Provide guidelines on how to develop a personal vision
- Explain how to secure help and guidance from the VisionCircle Foundation
- Explain how to register the VisionCircle with the VisionCircle Foundation
- Provide the forms that will assist the Initiator and VisionCircle members operate their VisionCircles and liaise with the VisionCircle Foundation.

Although the VisionCircle concept is simple, the mechanics are a little more involved. It takes time and a certain understanding to appreciate the reason why certain things are done in certain ways.

The founding VisionCircle (VC1) in the VisionCircle Movement, has explored the processes recommended by the concept’s Founder and have found that they work and have a strong logic behind them.

This, and other VisionCircle manuals, offers Circle members a guide to run their VisionCircles according to the structures and processes established by the Movement’s founder.

The VisionCircle Foundation acknowledges that it cannot stop anyone from forming their own “VisionCircle” and running it anyway they want. Placing the VisionCircle guidelines on the Web suggest that we encourage people to take up the concept, but at the same time, we provide the material that will enable them to have the greatest probability of success. The fact that we do this is no guarantee that the Vision Circle Foundation guidelines will be adhered to.

The VisionCircle Foundation has no vested interest in the VisionCircles other than seeing them succeed. The systems, procedures and guidelines provided here are those endorsed by the VisionCircle Foundation and are known to work. People who vary the guidelines are less likely to achieve success.

Accordingly, VisionCircles are encouraged to register with the Foundation in order to ensure they obtain the latest communications, tools, guidelines and experiences of members, among other benefits.

The VisionCircle Foundation therefore offers its full support to those VisionCircles registered with it but will not offer support to those VisionCircles who do not commit to following the accepted and supported processes.

## 2.0 How to get a group of people together

A VisionCircle can be composed of people from a wide range of backgrounds and interests.

The challenge facing a VisionCircle, if it is to be successful, is how to establish a VisionCircle that will deliver the promised benefits to its members?

The success of a VisionCircle rests on two fundamental elements:

1. Having the “right” people in it;
2. Following the endorsed processes built upon the experience of others.

### 2.1 What type of people to look for

The experience of the VisionCircle Movement is that one shouldn't persuade or “sell” people to join a VisionCircle - rather, people either understand the potential for the fulfilment of their own aspirations, or they don't. If they understand the potential, they will want to be involved in a VisionCircle when all their questions are answered. If they don't understand the potential, or would rather “do it alone”, then they won't want to be part of a VisionCircle.

The **Golden Rule** of VisionCircle membership is that only people who really *want* to be in a VisionCircle are the only people who will commit to the challenge and hard work. Conversely, a person who doesn't want to be in a VisionCircle **shouldn't be**.

If the Initiator is determined to commence a VisionCircle, then in broad terms, these are the types of people who may be interested and who offer the greatest potential for membership:

- People who will listen to new ideas;
- People who have an aspiration or dream;
- People who are unhappy with what they are doing;
- People who are tolerant of other people and cultures;
- People who have tried a range of strategies to achieve happiness but who have not entirely succeeded;
- People who seek to help humanity

Although these are broad guidelines and characteristics that you may easily identify in people you know, another valuable **Golden Rule** is: don't assume that people will, or won't be interested in the VisionCircle concept.

The people who join the Movement who appear “counter-typical” consistently surprise us. Some of these people have made magnificent contributions to the fulfilment of happiness of others – a contribution that would have been lost had stereotypes for members been applied.

The reason that these “counter-typical” people surprise us is that we don't always know what interests, concerns, pains or drives people. We therefore often make assumptions about others but we are often wrong – no matter how well we know them.

The Movement's experience suggests that one should not use one's own employment context as the *principal* place from which to find new Circle members. The reason for this is simple: many personal visions involve no longer doing that which the member is currently doing. It's hard to expect some co-workers (superiors and subordinates) to openly support a personal vision if leaving that employer will directly impact, threaten or disadvantage them. The involvement of some co-workers is appropriate provided no potential exists for anyone's interests to be compromised or conflicted.

There is a risk that people construct the VisionCircles from their existing networks, associates and friends, many or most of whom who are of “similar” backgrounds and interests. Although this is a natural tendency, it does limit the potential power of the VisionCircle.

Diversity of membership provides diversity of values, attitudes, opportunities, skills, networks, connections and breadth and scope of perspective. As such, diversity enhances the opportunity to bring innovative and powerful solutions to any personal vision.

When we speak of diversity, we mean diversity in:

- Age
- Sex
- Sexual preference
- Education
- Career
- Socio-economic group
- Religion
- Political views
- Hobbies and interests

It is *not* suggested that every VisionCircle should be composed of members comprising the full spectrum of “diversity”.

What we do say however is that *diversity in membership will enhance the VisionCircle rather than hinder it*, and that in building your Circle, you should be aware of the benefits that diversity offers. **It makes building trust and understanding a little harder to achieve, but the “payoffs” far exceed such difficulties.**

Leaving aside the self-serving usefulness of having a diverse VisionCircle, the satisfaction of working effectively and in a mutually beneficial manner with people of diverse backgrounds can be profoundly satisfying.

And in any case, VisionCircle members who graduate into the VisionCircle Collegiate will need to work with people around the world who have a higher degree of diversity than will probably be encountered in one’s own VisionCircle – so one may as well get used to it.

People not able to exhibit and practice tolerance toward people of diverse backgrounds have little potential for successfully participating in the VisionCircle.

Some people you invite will ask whether their partner can attend the first meeting. We welcome people with their partners attending the first meeting but we do not “allow” partners to participate in the same VisionCircle. This is because partners in the same VisionCircle decrease the power of the Circle since partners would work for their mutual benefit in any case. It is more effective for partners to be in separate VisionCircles because in that way they, as a “family” get the benefit of 40 people (2 VisionCircles) rather than “just” 20 people from 1 VisionCircle. Separate VisionCircles for partners also minimises potential disruption to a Circle in the event of a partner-dispute.

Many people ask whether one should start a VisionCircle composed from “strangers” or from friends. Both have advantages and disadvantages.

If one starts a Circle from among one’s friends then the advantages are:

- Shorter time needed to build trust and a relationship

- Lower potential for conflict or personality problems between members
- Skills and capabilities are understood sooner
- Potentially a higher level of commitment to fellow members early in the life of the Circle

The disadvantages of starting a Circle from among one's friends are:

- Potentially limited diversity among friendship group
- Pre-existence of assumptions about member motivations
- Pre-existence of a relationship history which may hinder later developments
- Harder for new members to “break into” the “family”
- Agreement to participate may be coloured by the relationship between initiator and member and may not be out of the member's conviction and commitment to the concept

The advantages of starting a Circle of “strangers” are:

- Same start point for everyone
- No preconceptions about individuals – everyone is free to build new image and relationship
- Potentially higher level diversity among “stranger” group
- No relationship history that may hinder later developments
- Easier for new members to “break into” the “family”
- Less likely that agreement to participate is coloured by the relationship between initiator and member and therefore less likely to not be the member's real conviction and commitment to the concept

The disadvantages of starting a Circle of “strangers” are:

- Longer time needed to build trust and a relationship
- Higher potential for conflict or personality problems between members
- Skills and capabilities of members take more time to understand
- Potentially a lower level of commitment to fellow members early in the life of the Circle

## 2.2 How to invite people

An effective way to determine whether someone is interested in the VisionCircle concept is by talking to them about the Movement *and for them to tell you that they are interested and want to learn more.*

Since such a request is unsolicited, it is probably sincere and suggests legitimate interest. If you speak of the Movement and then ask, “are you interested”, you're not quite sure whether a positive response is out of courtesy or whether it is sincere. If merely a courtesy, you might be wasting a lot of their and your time

Existing members of VisionCircles have found that the topic of VisionCircles and their interest and involvement in them come up frequently in conversation with people they know.

People are generally interested in what their friends are doing or what they are interested in. Talking about the VisionCircle Concept in that context is therefore natural.

People may be threatened if directly asked to commit to hear more about the concept or if invited to join a group that (to that point) they know very little about. They also get upset if invited to attend a meeting that turns out to be a “scam” or merely a “front” for something else. People are on their guard against approaches from friends to participate in a wide range of network marketing programs and are often affronted by them or suspicious of such meetings and activities.

The Movement’s policy is clear:

- Never represent the Movement as anything it is not;
- Never lie when talking about the Movement;
- If you don’t know the answer to a question, say so, but offer to find out the answer and get back to them;
- Never get someone to attend a VisionCircle event under false pretences;
- Never promise anyone that the VisionCircle will do things it can’t do.

If in mentioning your interest in the VisionCircle Movement during natural conversation, the other person expresses (what appears to be) sincere interest, then you can ask whether they would be interested in hearing more about the concept, and then give them details of your next or proposed meeting or that you will advise them when you have organised such a meeting.

### 2.3 What should you say?

If you know someone *really* well, and as a result of him or her expressing a problem or desire to you, you can approach them and say something like:

*“When we last met, you mentioned that you were trying to achieve “X” but weren’t quite sure of how to achieve it. I’ve recently become aware of a concept named VisionCircles which might be of interest in helping you achieve “x”. I’m happy to arrange for you to find out more about it to see if it can help. Would you like me to do that for you?”*

Where an Initiator has a wide circle of friends, it is acceptable to selectively choose them according to the comments above, and say something like:

*“When we last met, you recall I mentioned that I had become aware of the VisionCircle concept and you expressed some interest. I’ve come across a number of people who have a similar interest. So I’ve decided to get someone to come and talk to me about the concept so that I can make an informed decision about whether it suits me and what I’m trying to do with my life. Do you want to join us on that night.”*

### 2.4 Reminder notices

When you are setting up the inaugural meeting, you should attempt to have at least 10 people present if you intend inviting a VisionCircle Foundation member to talk about the concept.

Conversely, VisionCircles Foundation members are pleased to meet with small groups of people and even potential members on a one-on-one basis subject only to the availability of the Foundation member. If you require this help please direct your request to [jacoby@jacobyconsulting.com.au](mailto:jacoby@jacobyconsulting.com.au) with your request.

You should set a date that gives people at least three to four weeks’ notice of the meeting that gives them ample notice and enables them to schedule around this date.

As a guide, contact with initial invitees to a briefing session should be as follows:

- Four weeks (minimum) from proposed briefing session - First discussion (one-on-one) to establish their interest in hearing more about the concept;
- Three weeks from proposed briefing session - Contact by phone or e-mail confirming meeting date;
- Two weeks from proposed briefing session - Contact by phone or e-mail confirming location;
- One week from proposed briefing session - Contact by phone or in person confirming that a member of the VisionCircle Foundation has agreed to address the group;
- Two days from proposed briefing session - Contact by phone or in person confirming attendance.

The frequency of contact is intentional as it establishes “commitment and obligation” to follow through – namely to turn up and hear more about something *they said* they were interested in.

Secondly, by keeping the communication regular, it builds expectation and excitement.

All we expect is that if you have gone to the effort of organising a briefing session and had members of the VisionCircle Foundation commit to address the group, then the people you invited who expressed interested should turn up – no matter what the outcome of their decision to participate.

## 3.0 Setting up the initial introductory meeting

### 3.1 Purpose of meeting

The purpose of the initial introductory meeting is to:

- Convey information about the VisionCircle concept
- Answer questions that potential members may have that help them determine their interest
- Probe the level of interest to join or build a VisionCircle
- Establish credibility of the VisionCircle Movement for meeting participants through the attendance of a presenter authorised by the VisionCircle Foundation

### 3.2 Time of day

There are no strict guidelines when the initial introductory meeting should be held. The time chosen to conduct the meeting should:

- Enable the greatest number of interested people to attend;
- Provide enough time for the presenter to impart his/her information (typically approximately 30 minutes as a minimum)
- Provide enough time for the participants to ask and have answered their questions (typically approximately 60-90 minutes)

Total meeting time should therefore be given as two hours.

If scheduling a breakfast meeting, be aware that it will be difficult for people to organise themselves and get to the chosen venue on time.

Lunchtime meetings can be scheduled around lunch but are disruptive and last-minute work commitments can prevent people being punctual or forcing early departures or even no-shows. This type of session is not recommended.

Evening sessions are optimal provided ample notice is provided, An early start, such as 5.30pm to 6.30pm will inevitably mean that some people will

be late due to work or family commitments. If you don't plan to provide food or have access to it, people may get restless around 8.00pm without food.

Meetings scheduled to start from 7.00pm to 8.00pm should have some sort of food facility available or be structured around a meal. This takes the pressure to finish early and "forces" people to remain for the meal – generally longer than two hours. It also establishes a more informal and open atmosphere. This approach is recommended but be mindful of the guidelines in the section related to food and beverages.

The principal guideline here is to establish a time that best suits the people who you have invited to attend.

### 3.3 Time of week

Generally, weekend introductory meetings are difficult because the level of personal "sacrifice" is too great. If sessions must be conducted on weekends, then Sunday night is optimal.

Monday to Thursday evenings seem to suit most people provided ample notice is provided.

Be prepared however, that a single day or time will almost never suit everyone. Therefore you may need to organise with the VisionCircle Foundation for some one-on-one or "lounge room" presentations for those unable to attend your chosen date/time.

### 3.4 Choosing the location

The key requirement is to select a location that suits most of your invited people so that you make it as easy as possible for people to participate. People are generally unwilling to travel significant distances for something with which they aren't entirely familiar.

The first step is to list all invitees' addresses. Then plot their locations on a wall map. Estimate a central point for the majority of the invitees. Identify the area within 1-2 kilometres of the central point. You now have a focus for the venue of the meeting.

Some of the considerations to think about in choosing a location are:

- Parking for those driving
- Public transport for those using it
- House numbers of chosen venue – how hard is it to find
- Security and access if a corporate or organisation location is chosen

### 3.5 Choosing ambience and type of venue

It is hard to set hard and fast rules for the type of venue because circumstances vary enormously.

The best rule here relates to what is required for a successful meeting, which can be summarised as follows:

- You need an area where your invitees and presenter can sit comfortably;
- You need privacy where people can talk and where softly-spoken people can be heard or where people with accents can more easily be heard clearly;
- You need privacy so that you aren't disturbed during the presentation or discussion;
- You need access to conveniences and bathroom facilities.

Using these criteria, one might find a restaurant, company meeting room, public meeting area, private home, and a range of other venues that may suit. Some tips:

- Do not choose a restaurant unless you have a private area, and even then, make sure the public or staff won't disturb you on the way to the conveniences or kitchens;
- Remember that some people have aversions (dietary, culturally and personal preference) to certain types of restaurants so choose one that is reasonably "neutral" with a wide choice of meals. Either that or check with invitees that your choice is suitable before confirming the venue.
- If the venue is a private home, make sure all family members agree to the meeting and agree to avoid noises and distractions and to answer the phone promptly. TV should not be audible in the meeting area.
- If your home is located in an area that is not "central" to most of the invitees or is hard to find (particularly at night), then choose another venue. Some invitees might get stressed in having to find the location or getting home after the meeting. Taxi are OK for some, but expensive for others.
- Wherever possible, avoid venues that may impact perceptions of invitees. As an example and in light of the preference to develop a diverse group of members, choosing a meeting room within, say, a religious building may create a certain perception or attitude. This perception (as incorrect as it may be) may be detrimental to your attempts to establish your Circle.

### 3.6 Food and beverages

If you organise a breakfast, lunch or dinner meeting, there are a number of guidelines that will help you to construct an effective introductory meeting:

- All participants should pay for their own meals and be aware of this before arriving at the meeting;
- Except where you have the initial meeting in a home and provide nibbles and soft drink to be hospitable, don't feel obliged that you need to feed everyone.
- Remember that people have dietary preferences and restrictions. If you are inviting people to a meeting at a restaurant, or are arranging any type of food for them, then it is common courtesy to ask if they have any major dietary requirements. Most people will be able to accommodate most common requirements, but this does not apply to all people. Some of the most common requirements include vegetarian, vegan, gluten free, Halal, kosher, diabetic, and a range of other allergenic-based diets. You are not expected to cater for all of these requirements but you should let someone know because it may be important for them. You don't want someone coming to a meeting where a meal is to be provided only to find that there is little to nothing they can eat.
- No everyone can afford restaurant meals. Although it is difficult to ask people how much they wish to spend on a meal, it is easier to choose a restaurant where choices are wide and prices are moderate. If you choose an expensive restaurant in order to "establish an image", as an example, you will be sending the message that this style (and price) of restaurant is the "standard" you will be setting. This may influence a person's decision to participate.

- If you choose a restaurant, choose one that you have visited and where you have eaten in order to avoid “unpleasant surprises” related to quality of food or service.
- Alcohol in moderation can be supplied but never in an “open bar” format – it’s too easy to abuse.
- If alcohol is provided, then the drinker should pay for his/her own alcohol
- Please remember that alcohol consumption may offend some people, so if your invitees refuse an alcoholic drink, then respect their wishes.

### 3.7 Costs

Costs for the initial meeting should be allocated as follows:

- Costs borne by the Initiator:
  - Cost of mailings and phone calls where undertaken
  - Where meeting is in a private home, then the cost of non-alcohol drinks and nibbles
  - Hire of room where required but should be unnecessary
- Costs borne by invitees:
  - Cost of the meal if at a restaurant
  - Cost of getting to and from meeting place

### 4.0 The importance of perception

People perceive things, situations, events and other people in different ways. Superficial issues often dominate their impressions of new people and situations until “more information” impacts their knowledge, understanding and comfort.

As the Initiator of your VisionCircle, you need to manage the perception that your invitees may have of you, the concept and other potential members. Some of the tips that might help you manage these perceptions include:

- Avoid sensitive jokes and certainly avoid “blue” humour. Some people will be offended;
- Do not discuss politics or religion;
- Be very wary about discussing certain international affairs since most people have a view of some sort. We are not suggesting that these matters are never discussed, but that discussion of these issues at the initial meeting may colour perception unconstructively.
- Choose a venue that isn’t too sparse or too opulent.
- Dress in smart casual or in a suit (for men and equivalent for women). The matter of the VisionCircle is serious and needs to be seen as such.
- When introducing a VisionCircle Foundation member, show respect of them, their knowledge of the VisionCircle Concept, and gratitude for making their time available to you and your invitees.
- Be sincere in all that you say.
- Be humble.
- Be grateful to your invitees for showing the interest in the concept and be grateful to them for honouring you with their presence.

- If passion for the concept exist in your heart, don't be afraid to display it – but in moderation. Some people are scared to emotion and/or passion.
- Don't feel you need to be an apologist for the VisionCircle concept, In all probability, you have some idea of what the Circle can do and how it works, but it is unreasonable for you to expect to be able to answer all questions put to you – at least until your Circle has been operating for a period. It will probably serve you more effectively, if you participate in the meeting to also learn more about the concept and to share this opportunity of learning with others – rather than be seen as the “owner” of the idea. Let the VisionCircle presenter justify the concept and if he/she can't do that, then the invitees.

## 5.0 The importance of example

Members of VisionCircles who have had their vision selected are invited to commence a new VisionCircle for whom you are their mentor.

It is reasonable that those attempting to commence their own VisionCircle will use their experience with you and the way you invited them to their first meeting as a role model upon which to base their activities.

Setting an appropriate example is very important. Some of the elements of “good example” include:

- Selecting an appropriate venue and resolving any food and beverage issues
- Sensitivity to raising the VisionCircle concept: no pressure, no hard sell
- Effective and honest communications about the purpose of the meeting and its logistics
- A meeting run effectively, warmly, with no tensions or conflicts and run in a tolerant and politically correct manner
- A warm and welcoming approach to all invitees
- Probing of level of interest in the concept conducted in an unthreatening and unpressured manner
- Respect shown of all attendees
- Respect shown of the VisionCircle Foundation presenter

## 6.0 The First meeting

### 6.1 Agenda for the first meeting

The following is a suggested meeting agenda for the introductory meeting that works well:

- You welcome the invitees and thank them for coming in response to their interest in the VisionCircle concept.
- Explain the Agenda and that you expect the meeting to conclude at a certain time (two hours without a dinner or longer with a dinner)
- Deal with the housekeeping: conveniences, food and beverage ordering process and paying requirements or tea and coffee access, etc.
- Go around the table introducing everyone by name. Don't provide other details of individuals yet because they won't yet be comfortable.

- Introduce the VisionCircle Foundation presenter and invite him/her to explain the concept. This should take about 30 minutes
- Invite questions.
- Break to eat and allow indirect discussion between invitees
- Recommence question session. About 30 minutes
- You should then ask the invitees: “based on the information you have heard tonight, how many people here tonight are interested in principal in the VisionCircle and would consider participating?”
- You should then ask the invitees: “would you like me to organise our first meeting so that we can get to know each other better?”
- If answers to both of these questions are positive, you should:
  - Establish when they would like to meet
  - Their meeting format (restaurant, private home, etc)
  - Day of week
  - Time of day
  - Everyone’s contact details (Name, address, business and private phone numbers, fax, mobile and e-mail) Preparing a list with these details before the meeting (as best you can) and having them ratify or correct the information is of great assistance.
- Invite further questions
- Thank the VisionCircle Foundation presenter
- Thank the invitees
- Ask invitees if they all have a way to get home
- Close the meeting

## 6.2 Expectations of the first meeting

The expectations of the first meeting are as follows:

- Introduce the VisionCircle concept to those prospective VisionCircle members who have expressed an interest
- Gain knowledge about the concept from an authorised presenter
- Answer questions that prospective members may have
- Identify who is interested to proceed to the next step
- Commence building relationships between prospective members
- Invitees had attended an informative and enjoyable evening

## 6.3 Expectations from the first meeting

The expectations from the first meeting are as follows:

- Concept information conveyed effectively
- Answered all questions satisfactorily
- Commenced relationship building
- VisionCircle established
- Next steps established and agreed
- Chief point of contact agreed (normally the Initiator)

- Registration with VisionCircle Foundation understood and agreed

## 6.4 Encouraging questions

The initial meeting is all about conveying information, answering question, building relationships, building confidence and building trust. Answering questions that invitees have is the best way to achieve these outcomes provided that;

- All questions are answered honestly
- Where an answer to a question is not known, then that should be said with a promise to find out and circulate the answer to all members. “Covering up” or attempts to ad lib will be perceived as negatively as trying to hide something – and therefore counter-productive.
- That the person answering the question *knows* what they are talking about
- That the presenter is confident and sincere in all his/her responses

If the question and answer session appears to run dry or people are shy or reluctant to start asking, don't hesitate to either:

- Ask a question yourself to get the process going
- Have a break which gives people a chance to think about what has been said and then come back with questions after the break
- Stop to eat if your having a meal
- *The presenter is experienced in raising issues and generating questions and will sense when this needs to be facilitated*

The question and answer session is important because it enables any objections or concerns to be managed in an honest and open manner. It also allows those future members of the VisionCircle to hear the same message at the same time. Over time, peoples' recollections of what was said may vary: in this way there are many people who can corroborate a response should the issue come up again.

## 6.5 Probing

The first meeting is an opportunity, and a key objective for you to determine the level of commitment and interest to the VisionCircle concept.

### 6.5.1 Level of commitment to concept

Soon after the presenter has finished his or her presentation, you will be able to gauge the level of understanding from the type of questions raised.

Through the presentation, you should be watching for people's body language to determine if they are defensive or suspicious of the concept. If you sense any ill comfort or suspicion, such a feeling is probably based on insufficient information or a misperception.

If you suspect that you know the issue that is generating the concern (after all you know these people because you invited them), then ask the presenter to expand on the issue that you think is causing the concern.

If you find it difficult to identify the issue, you can suggest to the group that you “*sense some concern or reservation about some of the aspects in the presentation. Does anyone want to table their concerns so that they can be responded to?*”

The VisionCircle presenter is experienced in dealing with such concerns. It is better to surface the issue and deal with, than let it lie beneath the surface and never be able to directly respond to it.

It is important to note that even though a question may be answered accurately, honestly and openly, there is no guarantee that answers will always satisfy everyone. *Some things are just not meant to be – and that's OK too.*

### 6.5.2 Level of interest to commence Circle

Toward the end of the first meeting, you need to formally ask the invitees whether they want to commence a VisionCircle.

You at least owe it to yourself for the effort you have put in to know whether the invitees are interested **and whether they are the people that will contribute to your personal happiness.**

Don't be afraid to ask in a non-forceful manner.

Don't be offended or insulted if some people say no – because some will.

Don't try to convince people to join – they either “get it” or they don't – *and that's OK* – and in any case, you only want people who want to do this.

## 6.6 Frequency of meeting

VisionCircles meet once every two months once they have commenced the vision selection process. No more and no less.

However, it takes some time for members of a new VisionCircle to get to know each other to the point where the trust they have of each other is strong enough to commence the vision selection process.

Therefore, until the vision selection process formally commences, you may elect to meet more frequently to “fast-track” the relationship building. Some VisionCircles meet monthly and some two weekly – this is entirely at the discretion of VisionCircle members.

At the initial meeting, you as the Initiator should establish a view of what suits your invitees and VisionCircle members. This should only be done after they have confirmed their interest to proceed.

**Set the date of the next relationship-building meeting at this initial meeting.**

## 6.7 Preferred Day of month/week

Similarly, you should establish which day of the week suits most of the new VisionCircle members. This should only be done after they have confirmed their interest to proceed.

## 6.8 Time of day

Similarly, you should establish time of the day suits most of the new VisionCircle members. This should only be done after they have confirmed their interest to proceed.

## 7.0 Growing the Circle

The optimal VisionCircle size is about 20 people – a fine balance between having sufficient resources to apply to personal visions and the time it takes for people to wait for “their turn”.

VisionCircles normally wouldn't meet over the Xmas/New Year period leaving five effective selections per year. A 20-person VisionCircle with a selection every two months means that it takes four years between the first and last selection. This is considered reasonable since not everyone is ready at the same time with his or her vision or with his or her preparedness to commence.

On the other hand, of the 20 members, some will inevitably be unavailable to help at any particular time due to work, travel, lifecycle events, illness, etc.

The VisionCircle must therefore have sufficient people to “make a difference”.

Members will also drop out of the VisionCircle for a range of reasons totally unconnected with the VisionCircle, for example, work transfers, lifecycle events, partner transfers, moving house, etc.

### 7.1 How Many members should you have?

A 20-member VisionCircle is considered optimal and should be the target for each VisionCircle. 25 people is workable, provided that there is a selection every two months – otherwise the cycle time is not sustainable.

The VisionCircle Foundation presenter will discuss this in the presentation.

### 7.2 How to grow the Circle

At the initial meeting and after people have expressed their commitment to commence the new VisionCircle, they should be advised of the optimal size of the VisionCircle and the importance to achieve it.

Typically, members are asked to commit to bring one person to the next meeting to determine whether they are interested. It is advisable however, that they be encouraged to read the VisionCircle literature on the Web to familiarise themselves with the Concept.

The VisionCircle Foundation presenter will discuss this in the presentation.

### 7.3 When to grow the Circle

The best time to grow to 20 members is in its formulation stage because all member relationships grow together and because support from the VisionCircle Foundation is focused on your circle-establishment efforts.

The VisionCircle Foundation presenter will discuss this in the presentation.

## 8.0 Help from the VCF

The VisionCircle Foundation is there to help you succeed. They will do everything they can to give you what you need, whether that is presenters, materials or information – and as a rule at no cost.

### 8.1 Your relationship with the VCF "guest"

The VisionCircle Foundation presenter is an experienced, knowledgeable and important person. Treat them as such. When you request one from the VisionCircle Foundation, make sure you state the date and time of your meeting and the number of invitees so that they can provide the appropriate person for you.

Make sure you advise the presenter of the exact place and time of the meeting and of access, travel, or parking availability.

When the presenter arrives, introduce him or her to each invitee and then invite them to take a seat in a central position at the table.

Please make sure the presenter has water nearby.

At all times the presenter should be treated with respect and gratitude that he or she has made their time available to the invitees.

## 9.0 Registering with the VCF

In order for the VisionCircle Foundation to provide up-to-date information, newsletters and materials, it is necessary to have the VisionCircle register itself and its members.

This is an easy process and can be undertaken as follows:

- Online at the “register” page of the web site at [www.visioncircle.com.au](http://www.visioncircle.com.au)

- By mail on the appropriate form (see the last section of this document) and sent to:

VisionCircle Foundation Inc  
New Circle Department  
22-28 Fitzroy Street  
St Kilda Vic 3182  
Australia

- By Fax on the appropriate form (see the last section of this document) – sent to (613) 9598 5399
- By e-mail to [jacoby@jacobyconsulting.com.au](mailto:jacoby@jacobyconsulting.com.au)

## 10.0 Regular meetings

Once your VisionCircle has developed trust and strong relationships between members, it is time to start the vision selection process.

At the earliest opportunity, provide members with a schedule of meeting dates for a full year ahead so that they can diarise the dates and organise their affairs around them.

Select the day/date according to the guidelines below, but attempt to maintain the same rule, namely the first, second, third or last Monday, Tuesday, etc of every second month.

It is recommended that meeting in December and January be avoided in the Southern Hemisphere due to vacations and Holidays, and July and August in the Northern Hemisphere for the same reason.

### 10.1 Frequency of meeting

One meeting should be held every two months.

### 10.2 Time of day

Evening meetings are the norm, but meetings during the day are acceptable provided it suits members. An evening meeting will start at 6.30 pm and will normally conclude about 10.30 pm to 11.00 pm depending on the selection. This timing relates to a meeting held with a meal.

Meetings without meals will probably run an hour shorter.

### 10.3 Time of week

The guideline here is whatever suits members. Weekends are not preferred but if necessary, Sunday evenings are optimal but expect people to want to leave early due to work commitments the next day.

Monday to Thursday nights are preferred days.

## 10.4 Location

The key requirement is to select a location that suits most of your invited people so that you make it as easy as possible for people to participate.

### 10.4.1 How to choose one

The first step is to list all invitees' addresses. Then plot their locations on a wall map. Estimate a central point for the majority of the invitees. Identify the area within 1-2 kilometres of the central point. You now have a focus for the venue of the meeting.

Some of the considerations to think about in choosing a location are:

- Parking for those driving

- Public transport for those using it
- House numbers of chosen venue – how hard is it to find
- Security and access if a corporate or organisation location is chosen
- Time needed to get from work to the venue for most members

If the venues for meetings are the private homes of members, then members are committing to travel to whoever is hosting that meeting.

If the venue for meetings is a restaurant, then the VisionCircle has two basic options:

- Choose different venues or types of venues to vary the experience and add an aspect of discovery to the experience. Advantage is that members will experience a variety of restaurants – some good and some not so good. The disadvantage is that no “habit” will be formed, and that there is much more organisation involved. Ultimately, it is the members’ choice.
- Choose one restaurant and negotiate a “good deal” and keep going back until members say they want a change. Advantage is that you can probably negotiate a “good value” deal from the establishment for the ongoing patronage. Disadvantage is that the routine and/or menu may become boring.
- Some VisionCircles prefer to rotate restaurants until they find one the suits their needs and then negotiate a deal with the establishment.

It is hard to set hard and fast rules for the type of venue because circumstances vary enormously.

The best rule here relates to what is required for a successful meeting, which can be summarised as follows:

- You need an area where members can sit comfortably;
- You need privacy where people can talk and where softly-spoken people can be heard or where people with accents can more easily be heard clearly;
- You need privacy so that you aren’t disturbed during the meeting;
- You need access to conveniences and bathroom facilities.

Using these criteria, one might find a restaurant, company meeting room, public meeting area, private home, and a range of other venues that may suit. Some tips:

- Do not choose a restaurant unless you have a private area, and even then, make sure the public or staff won’t disturb you on the way to the conveniences or kitchens;
- Remember that some people have aversions (dietary, culturally and personal preference) to certain types of restaurants so choose one that is reasonably “neutral” with a wide choice of meals. Either that or check with members that your choice is suitable before confirming the venue.
- Try to avoid private homes for regular meetings. Few homes can comfortably seat 20 people and even if that is possible, it is unlikely that the 20 homes of all 20 members could seat 20 people, which would create a problem if members rotate the hosting function.

- If a single private home is chosen as the host venue, then other members should help with the preparation and cleaning up to take the burden off the host.
- If the venue is a private home, all family members should agree to the meeting and agree to avoid noises and distractions and to answer the phone promptly. TV should not be audible in the meeting area.

## 10.5 Food and beverages

If you organise meetings around a meal, there are a number of guidelines that will help you to construct an effective meeting structure:

- All participants pay for their own meals, either as a pre-negotiated fixed price or on the basis of what they individually eat and drink.
  - Advantages of Fixed price:
    - Easy payment: total bill divided by the number of members
    - No arguments
    - Everyone knows the rules
    - No disruption to flow of meeting.
    - Able to negotiate deal for the group with the establishment
  - Disadvantages of Fixed price:
    - Some people eat and drink more than others
    - Some people have dietary restrictions that create inequality in consumption
  - Advantages of Variable price:
    - Everyone pays for what they consume
    - Handles the natural differences in consumption between members
    - Is fair and equitable
  - Disadvantages of Variable price:
    - Messy when it comes to paying the bill
    - The restaurant will not happily maintain separate bills for each person
    - Impossible to fairly manage things like bottles of wine, or shared plates of food
    - If people need to “go to the servery” to order their meal and drinks, then this disrupts the flow of the meeting.
  - Solution: ask your members what they prefer and adopt their preferred arrangement – nothing stops the group reviewing the arrangement in the future if a more suitable arrangement is evident.
- Meetings held in a private home should not have meals provided for attendees, nor should this be expected. Having an external caterer where there is seating for all members is acceptable provided all members share the cost.

- Remember that people have dietary preferences and restrictions. Before any arrangements are made with restaurants, make sure that you are aware of any special dietary needs of members and that the restaurant can cater for those needs.
- No everyone can afford restaurant meals. Although it is difficult to ask people how much they wish to spend on a meal, it is easier to choose a restaurant where choices are wide and prices are moderate.
- If you choose a restaurant, choose one that you have visited and where you have eaten in order to avoid “unpleasant surprises” related to quality of food or service.
- The drinking of alcohol, always in moderation, should be at the discretion of members and I keeping with their culture and custom.

## 10.6 Costs

No cost should be incurred for securing venues for meetings. However, for a non-meal based meeting, members may contribute a small amount to cover tea, coffee and biscuits if necessary.

Meal costs should be borne by members

- Equally, or
- Based on each person’s own consumption

## 10.7 Agenda and activities in meetings

The activities undertaken in a regular meeting will depend on whether the meeting is primarily intended to build relationship or to undertake a vision selection.

A meeting to build relationships will normally include:

- A round-the-table update of member activities
- Relationship-building exercise (optional – since some people are cynical about organised relationship-building activities)
- Socialising
- Informal discussions between members to “get to know” one another
- Discussions dealing with technical questions regarding developing or forming personal visions and working toward delivering member visions.
- Meeting mechanics
- Administrative issues: contact details, meeting locations, organising food and beverage arrangements

A meeting intended to select a vision follows a strict agenda (see 10.8) but includes:

- Socialising before formalities commence
- A request for candidates
- Candidate presentations
- Reflection time for deliberation over Candidate/s
- Voting
- Counting of votes
- Declaring the vote

- Appointment of Coordinator
- Toasting the selectee
- Detailed questions of the Selectee

A meeting in the selection cycle but when no candidate presents:

- Socialising before formalities commence
- A request for candidates
- “Round-the-table” – personal update & progress on personal vision – about 10-15 minutes in total each person
- Identify when next candidate is likely

## 10.8 Typical Agenda of a Selection Meeting

The following is a typical selection meeting. The only changes that can be made relate to time, which need to suit the needs of members. Daytime sessions are entirely acceptable.

The VisionCircle meets on a scheduled meeting day at 3.00 p.m. sharp in the afternoon. They conduct around-the-table updates of member activity until 5.30.

At 5.30 members who wish to be considered for selection at that session, will verbally and in writing present a short statement of their milestones/vision for which they request assistance from the VisionCircle. It is advisable to have circulated a few weeks before the meeting a synopsis of their personal vision and invite discussion and feedback before the selection meeting.

Time allocated to each presentation should be 60 minutes divided by the number of candidates. These presentations will conclude at 6.30 p.m. sharp. Only members present may be considered for selection.

At 6.30 p.m. the meeting will adjourn for a rest, socialisation, leg stretch, walk around the block, etc. During this period members will consider the presentations and determine for whom they will vote. During this period, only personal reflection should be undertaken with no discussion of candidates, politicking or lobbying of members.

Ballot papers will be circulated at 6.30 and all members must vote and return their ballots to the Chairman by 7.30 p.m.

Members select a member to assist the Chairperson as scrutineer.

Voting is by secret ballot.

No proxies permitted or accepted.

The vote is binding on all members.

The ballot papers are to be destroyed after the vote is declared.

Dinner commences at 7.30 p.m. sharp.

The Chairperson announces the winning member as early as possible after the count with a Circle toast to the selected member.

No vote numbers are announced. The choice will be considered as unanimously supported by all members.

Members should not discuss the ballot once announced - the outcome being magnanimously accepted as the will of the group by everyone. Once a member has been selected, he/she presents a more detailed 15-20 minute discussion of his/her vision, milestones and tasks.

Members should ask detailed questions of the selected member about his/her vision and milestones so that they can determine how they can help

and what they should/could/would do (one task per day for 7 weeks). This activity takes the balance of the evening. Members should take notes.

One member is asked to work with the selected member as their coordinator for the duration of their seven-week selection. Their role is to provide guidance, support, coordination and encouragement to the selected member and to liaise with other members about their own task commitments. The role of coordinator is critical.

Coordinators change with each new selection.

Within 48 hours of the selection, each member should notify the selected member (through the coordinator) as to what he/she will do to assist and how he or she will stay in communication. This should be a list of 49 actions/tasks (1 task x 7 days x 7 weeks).

It is the coordinator's responsibility to coordinate (not instruct) members and to ensure that no two members are conflicting (eg attempting to approach the same contact or organise the same event). The selected member must not attempt to force helping members to do anything, yet the selected member must be able and prepared to do what has been coordinated for them: eg make a phone call, attend meeting, etc.

Although this Agenda is firm, these are a few variables that may impact the Agenda on a case-by-case basis:

- Where members are unable to commence the meeting at 3.00pm, then the meeting can be restructured as follows:
  - 6.30-7.00 Arrival & Socialisation
  - 7.00-7.30 Candidate presentation
  - 7.30-7.45 Voting and tallying
  - 7.45 Declaration of vote and toast
  - 8.00 Commence dinner and detailed presentation and question session
- Where the Selection Meeting is held directly after the conclusion of another Selection period, it is customary for the “outgoing” selectee and coordinator to speak briefly about their experience and to thank members for their efforts. It is also, subject to the nature of that vision, to formally present the outgoing Selectee with a physical depiction of their vision. In such a case, this part of the evening should be scheduled before the call for new candidates and should not take more than a half hour. Be prepared that this session often becomes quite emotional.

### Dummy Run

Some VisionCircles are naturally hesitant in embarking on a selection before they are comfortable with the process. One way to increase the level of comfort is to run a “dummy” selection that involves the following:

- Members agree that a “dummy run” is a good idea.
- Three members volunteer to develop a personal vision for presentation to the VisionCircle at the next VisionCircle meeting. The visions chosen may be entirely fictitious and bear no resemblance to that individual's actual personal vision.
- The purpose of the “dummy run” is to:
  - Start members thinking seriously about the visioning process
  - Test the selection process (voting) process

- Experience the process without the tension
- Discuss without risking offence, both the voting structure and the reasons for the vote (which is not permitted in a “live” selection).
- Allow members to experience the process, and therefore become more familiar with it, before a “live” selection thus increasing the effectiveness of the first selection for the first selectee.
- The evening should be conducted as a typical selection evening and should include:
  - Calling for candidates
  - Having candidates present
  - Reflection time
  - Vote
  - Tally the vote
  - Announce the vote and the formal toast
- After the toast to the selectee, the meeting should concentrate on discussing members’ experience and feeling regarding the process and why they voted for different visions, particularly whether the vision satisfied the criteria of a suitable vision.

## 10.9 Building trust and relationships

The building of trust and relationships between VisionCircle members should always be seen as an important part of all VisionCircle meetings. Once the VisionCircle matures into the Selection phase, relationships and trust between members should be reasonable strong. Formal relationship activities are generally no longer required but may be employed if circumstance dictate – such as the arrival of a few new members or in the event of tension or conflict.

## 10.10 Exercises in relationship building

There are many books and guidelines available that outline exercise and games that can be employed to help facilitate trust and relationships.

We don’t recommend specific activities for the following reason:

- Often people are familiar with the most common exercises employed in relationship building contexts and as such, the use of these commonly experienced exercises may lose their impact.
- Some exercises and games are context and/or culturally dependent or specific. Those who wish to use exercises should be sensitive and mindful that certain exercise might offend. As an example, certain cultures prohibit men touching women (such as holding hands, etc) – therefore exercises that require such activity may offend certain people.
- Some people are offended cynical about formal attempts to build relationships, and would prefer that this occur in a natural and unforced manner.

The message therefore is that you should know your members’ sensitivities before you attempt to impose such activities.

Relationships will develop through:

- A socialisation period before the formalities of a meeting commence

- During one-on-one discussion or general discussion between members during and after meetings – particularly when the meeting is around a meal
- After the meeting when some members linger to discuss issues, requests and opportunities stemming from the meeting
- Between meetings when members contact each other directly to discuss issues
- When members go “round-the-table” in turn

### 10.11 "Round the Table"

The “round-the-table” is an excellent meeting discipline to adopt and has the following features:

- Starting with any person in the group, each person speaks for about 5-10 minutes about what they have been doing since the last meeting including family, career, interests, lifecycle events, etc.
- When a meeting is held with no candidate for selection, then the “round the table” should focus on members talking about the progress they are making on their own personal vision development and the likely timeframe for their candidature.
- Initially, the “round-the-table” technique is used to build relationship and then evolves into managing personal vision development progress.
- Each person must say something even if it is to say that nothing has changed from their last meeting.

### 10.12 Sounding out Personal Visions

It is important for members to informally monitor the progress of personal vision development of members. This is to ensure that:

- Those seeking help with their personal vision get that help
- That not too many visions are candidates together (more than 2-3 at any meeting may be too many to effectively assess)
- Every vision complies with the criteria of a candidate vision
- Every candidate vision is in sufficient detail to be meaningful
- That the VisionCircle can make a meaningful difference to a candidate's vision
- That members know ahead of the meeting, of the detail of a candidate vision and the tasks that they may be asked to contribute to.

### 10.13 Establishing member contact details

Establish as soon as possible the contact details for each member and develop a list of these details that should be circulated to all members.

Seek a volunteer from the membership who would be prepared to maintain the member name and contact list. All members should proactively notify this person with any changes to the details recorded. The coordinator should recirculate the list after any amendments.

The list should include the date that the list was last changed.

## 11.0 Dealing with the VCF Support Team

The VisionCircle Foundation recognises that different questions will develop within VisionCircles that relate to their level of development and maturity. It

also recognises that VisionCircles need help to develop the processes needed to run the VisionCircle process effectively.

Accordingly, when you register with the VisionCircle Foundation, you will be assigned a Mentor who will be available to answer all your questions and to attend your meetings, at your request, until you can operate the process effectively and with confidence. Of course, this assistance is at no cost to you or your members.

## 12.0 Forms that will help you

### 12.1 Initial Meeting Form – determining invitee interest

# VisionCircle™ Foundation, Inc.

Suite 2 - 22-28 Fitzroy Street  
ST KILDA VIC 3182

Phone: (03) 9537 2199 Fax: (03) 9598 5399

Email: [jacoby@jacobyconsulting.com.au](mailto:jacoby@jacobyconsulting.com.au)

Website: [www.jacobyconsulting.com.au](http://www.jacobyconsulting.com.au)

Initiator:

DATE:

Name: .....

Address: .....

.....Postcode:.....

Phone No: .....Mobile:.....

Fax No. ....

Email: .....

Please state your preference:

I would prefer to:	(Please tick)
Start my own VisionCircle	
Join a new VisionCircle being formed (i.e. all strangers)	
Join an existing VisionCircle	
Receive more information from you	
Discuss my interest with someone	

*(Please complete and hand in before leaving - thanks)*