



# PEERSPECTIVES LICENSING FAQs

*PeerSpectives® is a methodology created specifically for leaders of second-stage business to process emotionally charged issues in a confidential setting among peers. The group is led by a facilitator who is trained by the Edward Lowe Foundation, and licenses to operate roundtables are available through the foundation. A PeerSpectives license enables you to run an unlimited number of roundtables in a geographical area of your choice. Facilitator training for one person is included in each first-year license, along with access to online marketing resources.*

## How do I get started?

Contact us to see if PeerSpectives is a good fit for you. We'll ask about your roundtable goals, your target audience and get you prepared for taking this program on. When ready, you'll receive a license to execute, including reviewing, signing and making payment. Within weeks of the next facilitator training session, you'll receive registration instructions and an invoice to cover additional trainees as appropriate.

After training and passing an exam, you'll be ready to facilitate a roundtable! You'll also gain access to an online resource that contains marketing and onboarding materials for your prospects. Along the way, we'll be in contact to invite you to quarterly facilitator peer group sessions, which are conducted virtually.

## What does a license include?

Annual licenses are \$800 for nonprofit organizations and \$1,000 for-profits. The license is nonexclusive, which means different organizations can run concurrent roundtables throughout a region.

Licensing fees include: Manuals for both facilitators and participants, templates for marketing materials, and documents for running a roundtable. First-year licenses include training for one person at no additional cost. Additional trainees or repeat trainees cost \$400 per person.

Licenses are renewable each year, and you will be contacted a few weeks prior to the expiration of your current license. Prices may change from year to year, and we encourage you to contact us to be aware of current pricing. License fees are not refundable. You may brand the roundtables as you wish. In return, we ask that your materials contain a statement that your roundtables use the PeerSpectives methodology through a license provided by the Edward Lowe Foundation.

## Where can I operate roundtables?

You will be asked to define a territory for the license; however, these boundaries are generally flexible. For example, you may identify a city, county/counties or region within a state (e.g., northeastern California).

Licenses are non-exclusive. If a licensee is located in an area you wish to serve, we will introduce you to foster collaboration. Licenses are available to serve U.S. domestic entities and individuals only.

## Where do I find roundtable members?

Licensees who launch roundtables successfully tend to have current relationships with potential participants, either as existing clients or through partnerships with organizations who maintain those relationships. If you are launching roundtables to attract clients, we suggest you hold off on a license until your audience is established. It's not easy to convince busy entrepreneurs to leave their offices, even if the opportunity provides them with necessary insights for working on their business.

## What if I don't have a facilitator?

Consider asking a colleague, staff member or community supporter to serve as a facilitator. They may be trained under your license for an additional fee. Or, contact us to find trained facilitators in your area who may be willing to run tables as your independent contractor. Regardless of who facilitates your roundtable, be sure to attend the facilitator training yourself to pick up invaluable knowledge about the PeerSpectives process and be better able to market your tables.

## Do I need a license to facilitate a table?

PeerSpectives roundtables require a license. As a trained PeerSpectives facilitator, if it's not feasible to have a license of your own, you can still practice your craft. Some suggestions:

- Contact current licensees in your area to offer your services.
- Contact organizations that are a good fit for PeerSpectives and encourage them to operate a license; offer to serve as their facilitator.
- If we hear from a current licensee wishing to hire an independent facilitator, we may contact you. Let us know if you're interested.

## Who should attend PeerSpectives facilitator training?

Future facilitators of PeerSpectives roundtables are required to be trained by the Edward Lowe Foundation under an active license. First-year licenses include training for one person; cost is \$400 each for additional trainees or those wanting a refresher when renewing a license.

Individuals who will be marketing your roundtables are encouraged to attend PeerSpectives training. They'll receive invaluable knowledge for developing marketing materials and answering questions from prospective members.

## What does facilitator training involve?

Training is conducted entirely through video conferencing, with a focus on second-stage companies and the qualities you should be aware of when offering services to them. The PeerSpectives protocol is examined in detail. Learning is conducted through videos, presentations by a trainer and practice.

The foundation focuses on second-stage companies and creates programs to benefit their growth. For that reason, PeerSpectives training assumes roundtable participants will be second-stage business owners, CEOs or presidents; however, the protocols may be adapted for other audiences.

## What if my clients are smaller than second stage?

PeerSpectives Roundtables for the Emerging Second Stager (PRESS) suits the needs of small business owners who are on the cusp of second stage. Current licensees are invited to use this approach if serving this audience.

PRESS combines interaction with a business expert with a peer-to-peer roundtable that uses the PeerSpectives methodology. Simply put, the difference is a change in the agenda: You start the session with the business expert, take a break, then proceed to the private roundtable segment.

Ideal participants are owners of high-potential first-stage companies with three to nine employees and about \$500,000 or more in annual revenue. The leader may not have led a company to this point before and does not have a wealth of experience to draw from.