

# Trusted Peer Groups

*Sharing and learning with trusted peers*



**twin cities chapter**  
*connecting financial executives*

# Mission/Objectives



Facilitate value-added discussion of professional and personal issues, concerns, challenges, successes and sharing experiences, ideas and best practices



Provide a confidential and safe forum for sharing amongst respected peers with similar job responsibilities



Support members in achieving their professional and personal goals



Provide this service in a cost effective manner

# Group Formation

- Peer groups will be grouped together by roles, CFOs, controllers & other finance leaders
- Further sub groups may be split by company size, level of sophistication and public/private
- Focus on fit and chemistry of group formation; multiple industries creates value



Peer group members must be existing FEI members in good standing and currently employed.

# Your Guide and Facilitator



## Sam Smith, Vice President

Sam is a senior consultant with the Prouty Project specializing in Strategic Planning and Organization Development. For close to two decades, Sam has worked with executives around the country and throughout the UK, Brazil and India to shift organizational mindsets that drive effective change, create adaptive advantage, and accelerate meaningful innovation. Sam designs and facilitates strategic planning initiatives, leadership and team development programs, and executive retreats. His mission is to engage, encourage, and equip leaders, teams, and organizations to **STRETCH** beyond themselves and what is known to what is seemingly unimaginable.

Sam grew up in Minneapolis, MN, competed as a Division 1 gymnast at Michigan State University, has worked in organizations from ranging from startup to Fortune 20, is married to wife Maureen and has 5 kids ages 9-20 and lives by his two favorite questions and statements: “What if?”-“Why not?”-“We can!”-“Let’s go!”

## Style & Philosophy

In facilitating group dynamics, Sam builds trust with individuals and among group members as an advocate for all participants and by introducing and practicing vulnerability and courageous communication.

When members experience a safe environment and are given the framework to constructively raise and work through issues, concerns and best practices, results come quickly. Sam will leverage group member’s familiarity by discipline (financial executives) and unique perspective by experience (industry, company size, personal background) to maximize the benefits of collaboration leading to breakthrough insights and solutions.



# Creative Space & Professional Support



The Creative Think Tank and Strategic Leadership Lab provide creative meeting space for groups looking to strengthen connections, increase clarity and commit to action.

Additionally, the space provides opportunity to stretch out, grab a snack, and sit around our kitchen table during breaks in the action.

The Prouty Project is committed to a long lasting partnership with FEI to serve members who wish to grow personally and professionally by engaging in meaningful dialogue and creative exploration with their peers.



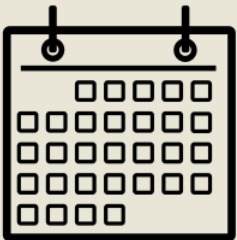
# Meeting Details



Target 12 members  
per group



Continental breakfast will  
be served



One meeting per month  
scheduled far in advance



Meetings will be in  
Eden Prairie at the  
Prouty Project facility



Meetings last 3 - 4 hours



Option to eliminate  
up to two meetings  
per year

# Meeting Format

- Introductions as needed
- 5 minute prepared updates from each member
  - Discuss issues, concerns, challenges, successes, questions of interest and thoughts
  - Include professional and personal items
  - Items rated 1/2/3 (low/medium/high) for importance and urgency – adds clarity and focus
- Highest rated items from updates and prior meetings are basis for remaining group discussion



In addition:

- Presentations may periodically be added
- Alternative methodologies may be utilized to facilitate value-added discussion and member learning

# Value

- Fee covers 48+ hours of peer group learning and development, including an independent facilitator, space and food
- Increase knowledge and skills to help members develop professionally and personally
- Opportunity to develop valuable, supportive and long-lasting relationships

## INVESTMENT

- Annual fee = \$1,500
- Significant value compared to similar peer groups in the Twin Cities which range from \$2,500 - \$10,000+



# Expectations

- Participate actively and meaningfully
- Focus on sharing similar experiences and results; no advice unless specifically requested
- Attend all meetings - if a member misses more than two meetings in 12 months they will be excused and must re-apply
- Sign confidentiality and hold harmless agreements
- Members who become unemployed can stay for the remainder of the year and re-apply thereafter
- No soliciting before, during or after meetings, however services may be requested



# Questions?

Contact Jason Voronyak  
[j.voronyak@comcast.net](mailto:j.voronyak@comcast.net) or 763-350-8928



**Jason Voronyak**  
*FEI Twin Cities Board  
Member and Trusted Peer  
Groups Program Director*

If you have questions that may also be addressed by our facilitator, feel free to connect with Sam Smith at [sam.smith@proutyproject.com](mailto:sam.smith@proutyproject.com) or 612-309-4295



**Sam Smith**  
*Prouty Project Vice  
President and  
FEI Trusted Peer Groups  
Lead Facilitator*