

Case Study – Confidentiality Business

Overview

Forum confidentiality as a success principle and forum norm should be reinforced at every forum meeting and retreat. Use of case studies to illustrate the nuances serves to remind members of the importance of confidentiality for safety and trust in the forum.

Description

This case study is on the topic of business. Read and discuss whether and why there are breaches. Then discuss what the forum has learned from the case study as teaching devices.

Sam Pender made what he hoped would be the last detailed presentation on the topic that he and his forum had been sharing ever since he joined YPO. As president of his family company, Sam had never been able to see eye-to-eye with his cousin, Frank, who was an equal shareholder and VP of manufacturing. From Sam's point of view, the company's financial decline during the last few years had been the result of Frank's lack of initiative and his total disregard for quality. From Frank's point of view, the decline was due to intentional, but unidentified actions by Sam to keep the company's value down while the two cousins discussed the possibility of a buyout. Sam's forum had mentioned a concern that the family conflict created a distraction and lack of focus that would continue to drag the company down. Some of the best employees were leaving and even some of the most risk-averse employees were job hunting in fear that the company would suddenly close or be sold because the two cousins could not reach an agreement on anything, let alone on the buyout.

In this month's presentation, Sam's mood was decidedly upbeat. In two weeks he was scheduled to finalize the buyout that would give him ownership of the company. The price he was paying was more than he thought was fair, but he felt a premium was necessary to overcome his cousin's belief that the company's problems were a sham designed to deny him the full value of his ownership position. Getting Frank to the point where he would accept any deal had been a delicate process. Sam was concerned about how long it would take him to turn the company around, but he was energized by the opportunity to focus his undistracted attention on the challenge. He was especially encouraged by the fact that a key employee who had left the year before had called Sam the day before to say he would love to have the opportunity to return to Sam's company, assuming that the cousin was gone.

The mood in the forum reflected the change. The entire group felt Sam's enthusiasm. Sam was one of those people everybody wanted to see succeed, and his conflicts during the last few years had been an emotional burden on the entire forum. Feeling that burden lifted boosted each member as the meeting ended. Two days later, Bill Smithson, one of Sam's forum members, was at the health club working out where he ran into Charlie Lidor, a friend who knew Sam as well. Charlie asked if Bill knew how Sam's business was doing, since Sam had not been the frequent presence at the club that he had been a few years before. Bill said, "I can't tell you anything, but I think Sam's future looks terrific. Maybe if he shows up here you can ask him."

Few people outside the company or the forum knew of the family conflict or the impending buyout. That weekend, Charlie Lidor attended a cocktail party, where he saw Sam's cousin,

Frank, talking effusively to a small group. Charlie walked over and said, “Frank, I heard from one of Sam’s friends that your business has some great prospects ahead. What’s up?” With that the fragile agreement Sam and Frank had crafted fell apart, with Frank totally and wrongly convinced that Sam had been withholding critical good news from him.

Is there a breach?

Yes. Whether it is good or bad news, news is confidential and Bill breached confidentiality when he suggested that to Charlie that Sam’s future looks terrific.

Case Study – Confidentiality Business 2

Overview

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Description

There are two case studies on the topic of business. Read them and discuss whether and why there are breaches. Then discuss what the forum has learned from the case studies as teaching devices.

Shankar was having dinner with his forum after their meeting had concluded. The group was in a private dining room in a club. Shankar assumed it was safe to share with the group about a potential investor, KJ who was looking to invest in Shankar’s real estate business.

Another forum member, Aditya, knew the investor KJ’s brother through his school alumni group. At the next alumni meeting, Aditya had mentioned to the KJ’s brother how he was excited to hear about KJ’s investment plans in his friend’s company.

The very next day, Aditya’s forum was called for an emergency meeting where Shankar angrily expressed that his confidentiality was breached and his potential investor KJ was unhappy that the news about his investment was made public and KJ threatened to pull out of his investment. The members visited the norms and evaluated the situation to conclude that the dinner was not forum and there was no breach.

What should be done? How could this have been prevented?

Since the meeting had been concluded Shankar had incorrectly assumed that the forum confidentiality was extended to dinner. If he wanted any discussion kept under wraps, he should have made that clear. It may be argued that Aditya could have exercised better caution – but this still does not qualify as a breach.

Upendra shared with his forum that his relationship with his CFO, Sanjay, who was also a second cousin to Upendra, was increasingly strained. Sanjay had been acting distant and avoiding meetings. In fact, he was beginning to suspect foul play. At this stage Upendra was unclear how to go about investigating facts to confirm his doubts. For now, he was playing ‘wait and see’ to avoid family discord. He had also postponed the company’s plans on another round of fund raising where Sanjay would need to be a participant.

Upendra’s forum mate, Ricky, knew Sanjay socially from the club. Soon after this meeting, Sanjay bumped into Ricky at the club and they talked amongst other things, about business. Sanjay mentioned that his company was making a strategic error in not expanding aggressively and that Upendra’s leadership was off target. Ricky had been in forum with Upendra for 4 years and thought highly of him. On reflex, Ricky responded to Sanjay that perhaps it was him and not Upendra who was holding the business back.

At the next meeting Upendra mentioned that Sanjay had left the company and the bitterness had spilt the family. He also mentioned that he was unable to continue with the forum.

Did Ricky cause a breach in this instance where Sanjay seemed to talk to him in confidence?

Regardless of his friendship with Sanjay or the fact that Sanjay had initiated a sensitive conversation – forum confidentiality comes first. Ricky’s intent was to stand up for his forum colleague but he was indeed violating forum confidentiality. He had given away to Sanjay that Upendra had been discussing their disagreement with the forum.

Case Study – Confidentiality Business & Relationships

Overview

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Description

This case study is an interactive and kinetic exercise that works well as a teaching tool.

Invite all the participants to stand up and gather in the center of the room. The idea is to do a dichotomous exercise and then invite comments and discussion.

If participants agree, they go to one corner of the room; if they disagree, they go to the other end. They discuss among within their corner why they agree or disagree and they give their comments. Some of the questions may fall in the gray area. Even then, encourage the members to make a choice of one corner.

Situation	Best practice on Agree / Disagree
1. "I completely trust my secretary with all confidential information."	Disagree. Just because a member trusts the secretary with all his/her confidential information, does not mean the member has the right to entrust the confidential information of the other members to the secretary.
2. Why, I tell my spouse everything.	Disagree. No pillow talk. Thus, it is a good idea for both you and your spouse to be in forums.
3. I am not sure if I can say, anyway keep it to yourself ...	Disagree. If you are not sure, then it must be confidential. Assume That Anything And Everything Said At The Forum Is Confidential.
4. Member sends the agenda of the meeting by fax. Is this a safe method? (give reasons)	Disagree. Fax may be seen by others. Also equally important, how do you dispose of the information given in a meeting? it must be torn up at the end of the meeting. Thus, if you have received an idea that you want to keep,

	<p>carefully write somewhere else concurrently. Be sensitive to all materials.</p> <p>Is your email password protected?</p>
5. It's all right to tell a mutual friend that the member has come in late.	<p>Disagree. Everything at a forum is confidential. Confidentiality is absolute and total.</p>
6. A member has stated that she has started to take French lessons. You want your daughter to learn and wants her to know that xyz, who is already 39 years of age is still learning a language. You tell your daughter.	<p>Disagree</p> <p>Then, how do you go about it?</p> <p>Ask the member's permission to say.</p>
7. A Member discloses that he has cheated the company. You are subpoenaed. You tell what you know.	<p>AGREE.</p> <p>In the case of lawsuits and other legal proceedings, forum confidentiality may or may not be honored.</p> <p>Members who testify under subpoena must comply with the law.</p>
8. I have left my forum. Even though I have left my forum, I cannot talk about what happened there.	<p>Agree.</p> <p>Confidentiality is forever.</p>

Confidentiality Case Study – Family & Relationships

Overview

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Description

There are two case studies on the topic of family. Read them and discuss whether and why there are breaches. Then discuss what the forum has learned from the case studies as teaching devices.

Anil and Ramesh have been in forum together for nearly 6 years and over time their families have become very close.

Anil and his wife, Gauri, have a nine-year old son who has a serious health issue that could be life threatening. Anil and Gauri disagree about whether they should discuss the health issue with others at this stage. Gauri does not want Anil to talk to anyone about their son’s health. But Anil secretly decides to discuss the issue with his forum as a way to get advice and resources for his son. He and Gauri take their son to a research facility in Pune. Anil reports back to the forum and indicates that the diagnosis is still uncertain.

At a social function Ramesh sees Gauri and asks, “How was your trip to Pune?” Gauri became flustered and appeared angry. **What went wrong?**

Ramesh, like all other forum members was concerned and asked Gauri with all good intent about the trip to Pune. He, however, disclosed that, as forum mate, he was aware of the trip and this could well imply to Gauri that Anil had discussed the son’s situation in the forum in spite of her opposition. This is a breach as Anil and Gauri might well have agreed not to talk about the trip to anyone.

Upasana’s forum had been active for six years and had recently added two new spouses including Jhanavi. At a forum update, Upasana shared that her brother was engaged to Ravi's sister, another YPO member from the same chapter. She also shared that Ravi’s wife, Rita, seemed to have an objection to the alliance.

At the next YPO chapter event, Upasana and her husband were sitting with Jhanavi and her husband, Ajit. Jhanavi leaned over and asked Upasana to point out Rita, the trouble-maker, who was coming in between the young couple.

Upasana’s husband visibly flinched as he was in the same forum as Rita’s husband, Ravi. He was upset as he had another side to the story in his forum. **What happened here? Is there a breach?**

Even if this was ‘normal’ confidentiality, Jhanavi has violated forum confidentiality by discussing a forum conversation in front of an outsider.

Confidentiality Case Study – Relationships

Overview

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Description

There are two case studies on the topic of relationships. Read them and discuss whether and why there are breaches. Then discuss what the forum has learned from the case studies as teaching devices.

Case Study 1: Forum “Hot Sauce” held their retreat in Las Vegas, Nevada in the autumn. The retreat included a range of activities, including group exercises along with some nightlife gambling.

All of the members of “Hot Sauce” attended the holiday party in December. While there, Tyler, a member of the forum chatted with forum mate, Suzanne, and her husband, Mark. Tyler commented “Hey Mark, Suzanne sure put us in our place at the poker tables! She’s a real player!” There was an awkward silence and what appeared to be some tension between Suzanne and Mark. The conversation abruptly ended and Tyler worried that he might have shared more than he should have.

Unknown to Tyler, the retreat was a sore spot for Mark and Suzanne. Mark had been against her attending the retreat, he saw it as a big excuse to party. Suzanne had reassured him that the retreat would be 95% forum business. ***Is there a breach?***

This is a case of forum breach. It is irrelevant that Tyler did not know about the tension between Suzanne and Mark. Tyler conveyed to Mark a forum activity. All activities at a Retreat (unless agreed otherwise) are considered as ‘Forum’ and bound by norm of confidentiality.

Case Study 2: Two forums, a members’ and spouses’ forum, were formed at the same time for new members. Two couples Peter & Liz and Leon & Cindy joined these forums respectively. After about 2 years, Leon and Cindy’s marriage got into trouble and the two were going through a divorce. Leon kept insisting that his divorce was different to others and that it was consensual.

One night at an YPO function, Peter was sitting at a table made up mostly of Liz’s forum. Jane, a member of Liz and Cindy’s forum, turned around and said: “Who is this Leon guy, I want to see what this idiot looks like?”

At the next forum meeting Peter said to Leon that he did not think things were as simple as Leon had indicated and relayed the story to Leon.” Leon was furious and attacked Cindy on the matter when they next met.

After the next spouses’ forum, Liz questioned Peter about what he said to Leon and she accused him of putting her in a difficult spot. ***Was there a breach in confidentiality?***

Leon breached confidentiality when he disclosed the dinner conversation that Peter shared with him at the forum meeting. The discussions at the YPO function were not ‘forum confidential’ – however, the conversation between Peter and Leon at the forum meeting is protected.

Confidentiality Case Study – Relationships

Overview

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There are two case studies on the topic of relationships. Read them and discuss whether and why there are breaches. Then discuss what the forum has learned from the case studies as teaching devices.

Abhimanyu shares from his recent visit to Europe in his forum update. Although he is not a horologist, his highlight is the purchase of a pair of rare, antique clocks. Soon after the forum meeting, Abhimanyu and his wife Sudipta, attend a YPO chapter event. Abhimanyu’s forum mate, Rajeev, meets them and asks Sudipta how she is enjoying the pair of antique clocks.

Sudipta looks pale as she stammers, “Fine, thanks” and excuses herself. Rajeev senses that something is wrong but is unsure if it was something he said. The following day, Rajeev receives a call from his forum’s moderator. The moderator informs Rajeev that the forum is convening a meeting as Rajeev has apparently breached confidentiality. **Did Rajeev cause a breach in this incident?**

This incident is a clear breach of confidentiality. Rajeev’s question about the clocks to Sudipta seems innocent. He may have considered the purchase as ordinary. However, Sudipta’s reaction clearly indicates that something was amiss. Despite Rajeev’s harmless intention and regardless of the issue Sudipta had – the breach lay in the fact that Rajeev had disclosed a discussion from the forum meeting.

Savita is a YPO member and has been part of forum five that had been active for three years. The forum was getting ready for its retreat in Goa, but Savita was struggling to make the date as her husband Vinay’s family had a religious event at the same time. Savita’s forum members were unable to set another date. Savita promised her forum that she would work out something and make it to the retreat.

Savita was indeed able to join the retreat. A fortnight later at a social event, one of the forum five members met Vinay and thanked him for letting Savita join the Retreat and shared the photographs from the retreat using her Facebook page where she posted the retreat photographs. She also added that she was a natural on the water scooter and rode it better than anyone else. Vinay nodded politely but it was clear that he was not enthused.

Savita had told Vinay that her participation was important at the retreat. She had emphasized to him that it was a not a fun retreat but one focused on important forum issues. **Should Savita have explained the situation to her forum? Is there a breach?**

This is a case of forum breach. Savita might have expressed to her chapter about her need to get her husband’s agreement to miss the family event. Her forum mate thanking Vinay conveys that he was discussed in the forum. Also, all activities at retreat (unless agreed otherwise) are considered as ‘Forum’ and bound by norm of confidentiality. Talking about the water scooter activity is a second breach in this case. Posting and showing photographs on Facebook is also a breach.

Confidentiality Case Study – Spouse Forum

Overview

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Description

This case study is on the topic of family. Read and discuss whether and why there are breaches. Then discuss what the forum has learned from the case study as teaching devices.

A 10-month old spousal forum in Africa heard a presentation from Karen that involved conflicts between Karen and her sister and brother-in-law. Several days after the meeting, another forum member, Sarah, phoned Karen to offer some additional support. Karen was not there when Sarah phoned, and Sarah left a supportive message on Karen's answer machine. When Karen returned home, she was with her sister and brother-in-law, and she played back her messages. Her sister and brother-in-law heard the message that related to them.

Is there a breach?

Sarah had good intentions by leaving a supportive message, but breached confidentiality by leaving a recorded message without reasonable expectation of the message being private. Sending an e-mail message or leaving a message on a home phone may be risky and a best practice is to make sure that the phone numbers are private before leaving messages that relate to any forum confidential discussions.

Sandra, member of a spouse forum in Europe, shared a very personal health problem with her forum, something that she had not shared with anyone else. After the meeting, another member did some research on the health issue, and emailed all members of the forum with her findings, along with words of support. Sandra did not have a private email address, but shared it with her husband and teenage children, who saw the message before Sandra did, as did family members of the others in the spouse forum.

Is there a breach?

Similar to the above case study, sending an e-mail that is not private is risky and a best practice is to make sure that the forum mate can only access the e-mail before sending messages that relate to any forum confidential discussions.

Case Study – Forum Placement

Synopsis: A new YPO Gold Forum Officer must find a forum for a spouse who is difficult to place.

Susan is the new Spouse Forum Officer for his chapter. At her first Executive Committee meeting, Ed, a new member of the Committee, asks Susan to look into why his wife, Michelle, has not been placed into a spouse forum. He tells Susan that Michelle indicated an interest in joining a forum over a year ago, and is still waiting. Susan forwards the question to his predecessor and discovers the following:

- *Last year, the chapter added 6 new members.*
- *Four of their spouses expressed an interest in forum and received forum training.*
- *Three of these spouses were offered and accepted forum membership.*
- *Michelle, the fourth spouse, was rejected by all forums.*
- *Earlier this year, the chapter added 8 more members, and 3 of their spouses expressed interest in joining a forum. They completed a Forum Fundamentals course and were placed into the three existing spouse forums.*

The former spouse forum officer recalls that Michelle had been offered as a potential member to at least two spouse forums because she was first on the priority list, but once again, all forums rejected her.

Questions for Discussion:

1. What additional questions would you have for Susan’s predecessor?
2. If you were the Spouse Forum Officer in this chapter, would you feel comfortable approaching Michelle and speaking to her directly about her inability to find a fit in forum? Why or why not?
3. How would your response to Ed and Michelle differ if you learned that that Michelle had been rejected by the forums because:
 - a. She is in a lower “social class”
 - b. She is widely perceived to be egotistical and pretentious
 - c. The other forum members do not approve of the way she is raising her children
 - d. She has a reputation as a malicious gossip
4. What other opportunities would be available to Michelle in your chapter or through YPO if she is unable to join a chapter spouse forum?
5. How are new spouses in your chapter tracked to ensure that they receive an orientation and/or introduction to forum, opportunities for forum training, and offers to join a forum?
6. What is the role of your Chapter Administrator (CA) in maintaining the chapter’s historical knowledge?
7. How involved is the CA in the administration and tracking of forum placement within your chapter?
8. How is knowledge in your chapter transferred from the outgoing to the incoming officer?

Confidentiality Case Studies

Overview

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Description

There are a number of case studies on confidentiality, conflict and conflict of interest. Review them one at a time and discuss as a forum.

Confidentiality & Solicitation

Chris is a long-time member of the San Diego chapter where his wife, Sue, participates in a spouse forum. Sue is chairing an upcoming black-tie gala event to raise funds for Children's Hospital and mails an invitation to the home of each of Chris' forum members. Two of the forum members, Joan and Jens, are quite upset when they receive the invitation, and subsequently call Todd, the forum moderator. Joan and Jens believe both confidentiality and non-solicitation policies have been violated. *How would you recommend Todd handle this situation? Is this a breach of confidentiality? Can this adversely affect the forum?*

Confidentiality

Bill and John have been in forum together for more than 7 years and their families have become very close. Bill and his wife, Mary, have a 5-year old son who has a serious health issue that could be life threatening. Bill and Mary disagree about whether they should discuss the health issue with others. Mary does not want Bill to talk to anyone about their son's health. Bill discusses the health issue with his forum as a way to get resources for his son and he and Mary take their son to a university facility in another part of the country. Bill reports back to the forum and indicates that the diagnosis is still uncertain. At a social function John sees Mary and says, "How was your trip to New York (the site of the University facility)?" Mary became flustered and appeared angry. *What went wrong?*

Confidentiality

Two forums, a members' and spouses' forum were formed at the same time for new members. Two couples Peter & Liz and Leon & Cindy joined these forums respectively. After about 2 years Leon and Cindy's marriage got into trouble and the two were going through a divorce. Leon kept insisting that his divorce was different to others and that it was consensual.

One night at an YPO function, Peter was sitting at a table made up mostly of Liz's forum. Jane, a member of Liz and Cindy's forum turned around and said: "Who is this Leon guy, I want to see what the dickhead looks like?"

At the next forum meeting Peter said to Leon that he did not think things were as simple as Leon had indicated and relayed the story to Leon." Leon was furious and attacked Cindy on the matter when they next met. After the next spouses' forum, Liz questioned Peter about what he

said to Leon and she accused him of putting her in a difficult spot. *Was there a breach in confidentiality?*

Conflict

Derek and Jason are both members of the LA YPO chapter and both participate in forum although they are not in the same forum. Their wives, Roxanne and Shelby are actively involved in spousal forum. They're in the same forum, a very strong well established forum and have become good friends. In the last 6 months, Jason has accepted a position as the President of one of the companies held by Derek's family business group. This makes Jason as chief executive of the family business group, Derek's boss. They are both thrilled with this new development.

As for their wives, Roxanne does not think this will be an issue for the spousal forum but Shelby has taken the moderator aside and shared that she feels uncomfortable with the new relationship between their spouses.

Conflict

Todd, a long-time member of the Los Angeles chapter, received his mortgage from forum member, Sue's husband, Steve, before they were actually in forum together. Due to the current economic downturn Sue's husband is forced to foreclose on Todd's lovely new home putting Todd's pregnant wife and baby on the street. Steve shared the details of Todd's financial predicament which has caused concern for Sue as Todd has not been sharing the details of his foreclosure in his updates. With this newfound information Sue feels she can no longer trust Todd and brings it to the moderator. The moderator brings it up at the next meeting putting Todd on the defensive. Todd argues that he has simply been prioritizing what he shares and brings up topics that he feels the forum can most help him with the most, he feels he knows his choices around the foreclosure and that is why he hasn't brought it up. *We can't possibly bring up every issue in our life during forum. Todd has shared his financial troubles with the forum, is it wrong that Todd hasn't talked about this specifically? How should this be addressed? Is there anything inappropriate that Sue, Todd or the moderator has done?*

Conflict of Interest

Marjorie has been in spouses' forum for 4 years. Recently, the forum has discussed bringing in new members. At the meeting, Marjorie learns that Sue is being considered for the forum as a new spouse to the chapter. Sue's husband and Marjorie's husband worked together as division heads for a privately held company in the past. Marjorie believes that Sue's husband was not open and direct with her husband. Marjorie's husband believes that he has a good working relationship with the other member and they will be in a member forum together. Some of the forum are not clear why Marjorie objects to Sue's membership and believes this is a conflict.

What is the conflict?

Conflict of Interest

John and Jack were in the same forum. John had taken over and built his family business after his father died to the point where it was significantly larger. He had, however, reached the stage where he felt he needed an independent board to assist him in taking the business to the next level. John particularly admired Jack who had impressed him as a forum moderator and asked him if would assist him in forming an advisory board. Jack agreed.

Everything went well until a few years later when some of the expansion plans John had been working on got into troubled waters. John blamed Jack for poor advice this caused tension in the forum with members taking sides.

What can be done to alleviate the issues and what actions would have prevented the conflict on the first place?

Good News or Bad News, All News Must Be Confidential

Sam made what he hoped would be the last detailed presentation on the topic that he and his forum group had been sharing ever since he joined YPO. As President of his family company, Sam had never been able to see eye-to-eye with his cousin, Frank, who was an equal shareholder and VP of Manufacturing. From Sam's point of view, the company's financial decline during the last few years had been the result of Frank's lack of initiative and his total disregard for quality. From Frank's point of view, the decline was due to intentional, but unidentified, actions by Sam to keep the company's value down while the two cousins discussed the possibility of a buyout. Sam's forum group had mentioned a concern that the family conflict created a distraction and lack of focus that would continue to drag the company down. Some of the best employees were leaving, and even some of the most risk-averse employees were job hunting in fear that the company would suddenly close or be sold because the two cousins could not reach an agreement on anything, let alone on the buyout.

In this month's presentation, Sam's mood was decidedly upbeat. In two weeks he was scheduled to finalize the buyout that would give him ownership of the company. The price he was paying was more than he thought was fair, but he felt a premium was necessary to overcome his cousin's belief that the company's problems were a sham designed to deny him the full value of his ownership position. Getting Frank to the point where he would accept any deal had been a delicate process.

Sam was concerned about how long it would take him to turn the company around, but he was energized by the opportunity to focus his undistracted attention on the challenge. He was especially encouraged by the fact that a key employee who had left the year before had called Sam the day before to say he would love to have the opportunity to return to Sam's company, assuming that the cousin was gone.

The mood in the forum reflected the change. The entire group felt Sam's enthusiasm. Sam was one of those people everybody wanted to see succeed, and his conflicts during the last few years had been an emotional burden on the entire forum. Feeling that burden lifted boosted each member as the meeting ended.

Two days later, Bill, one of Sam's forum members, was at the health club working out where he ran into Charlie, a friend who knew Sam as well. Charlie asked if Bill knew how Sam's business was doing, since Sam had not been the frequent presence at the club that he had been a few years before. Bill said, "I can't tell you anything, but I think Sam's future looks terrific. Maybe if he shows up here you can ask him." Few people outside the company or the forum group knew of the family conflict or the impending buyout.

That weekend, Charlie attended a cocktail party, where he saw Sam's cousin Frank talking effusively to a small group. Charlie walked over and said, "Frank, I heard from one of Sam's friends that your business has some great prospects ahead. What's up?"

With that the fragile agreement Sam and Frank had crafted fell apart, with Frank totally and wrongly convinced that Sam had been withholding critical good news from him.

Kindness and Concern Can Backfire

In the chapter, forum meetings were scheduled just prior to chapter meetings. Forum members would spend four hours together, then the chapter would collect for cocktails prior to the guest speaker and dinner. At the meeting of Forum IV, the bulk of the time had been focused on a discussion of how and whether to pass wealth on to children. Early at the meeting, during the very end of his 5-minute update, Greg had mentioned that his wife, Karen, had been ill and they were concerned because they weren't sure what the problem was. Everybody in the group liked Karen. She had always gone out of her way to show thoughtfulness to Greg's forum members and their spouses. Greg was quiet during much of the meeting, but none of the members noticed due to their focus on the discussion topic.

The forum meeting ended and shortly thereafter the entire chapter gathered for the meeting. Greg, Karen, and another couple were standing near the bar when one of Greg's forum members came up to Karen, gave her a kiss and said, "I hear you've been ill. I hope you're feeling better soon." As she heard the words Karen stiffened and Greg turned white. The few couples nearby sensed the sudden silence, then Karen started to cry. Greg put his arm around her and they headed out the door. The few people who were able to see them in the last instant before they entered the elevator could see that Greg was crying too. Greg's brief mention during his 5-minute update was all he could bring himself to share with his group that day. He wanted to share more, but found that he didn't have the emotional resources to do it that day. He knew he had to be first on the agenda next month, though. He needed time to adjust to the news he and Karen had heard that week, and to hope that the initial reports were wrong. He and Karen had agreed the forum should know something, but wanted to limit the details until the information became more concrete. Neither Greg nor Karen wanted YPO members outside the forum to know anything. Karen had spent her life knowing she might be stricken by the same disease that had taken both her mother and her grandmother at an early age. The symptoms that had started recently might be something else, but she was due to enter the hospital the

next day to start the tests that might tell her what she had been afraid of hearing for most of her life.

They had decided to attend the YPO meeting that evening because it was a chance to get away from the cloud hanging over them and to distract Karen from the tests she would begin the next day.

Do Small Pieces Matter?

Jim walked through the front door of his house an hour later than expected. His wife, Jane, knew he had been at his YPO forum meeting. She was very supportive of his forum involvement, and never probed about what had taken place at the meetings. Since she was in a spouse's forum, she knew the value of confidentiality, and each of them had learned to live with the awkwardness this sometimes caused.

Jim was clearly drained when he came in the door. He hugged Jane for an especially long time, even for him. When they were going to sleep that night Jane heard Jim sigh, then he said, "Honey, I can't tell you how much I appreciate how you communicate with me. I know if we have problems you'll talk to me about them instead of letting them build up until it's too late. I just feel lucky right now."

As Jane lay there in the dark she thought back to that morning when Jim's forum agenda had been out on the breakfast table. The only item had been a presentation from Henry.

You mean I'm not supposed to tell anybody?

Forum #1 had been the first forum to form in the chapter. The members were proud of how they had kept their group active during that time and how they had followed forum protocol closely. Each meeting began with and ended with an affirmation of the group's commitment to confidentiality.

At a recent meeting, Ian mentioned in his update how difficult it had been to not share a piece of news with his wife. At that point, Randy said, "well of course confidentiality doesn't go that far. My wife is my best friend. I tell her everything. She won't tell anybody else." In the ensuing discussion it appeared that two other members also had situations where they shared forum information "because the people I tell won't tell anybody and because I don't think they know any YPO members."

Forum #1 was the first forum to fold in the chapter. A few members left the chapter as well.

Confidentiality is Forever, isn't it?

Vern was a great source of stories while he was in YPO. Many of the stories he told, while other stories were told about him. He was a larger-than-life entrepreneur who left enough stories in his wake to keep a comedy writer employed for a decade. A few stories, however, were told only in his forum.

The chapter and his forum missed Vern when he graduated. His memory stayed alive for two reasons. First, the "Vern stories" continued to entertain members as they continued to be told.

Second, Vern had become a widely known celebrity in the city. There was talk of his seeking public office.

Within the forum, Vern left behind some of the stories continued to be told. Their entertainment value was too irresistible to suppress. As new members joined the forum, they inherited the legacy Vern left behind. Apparently one of the new members didn't understand that confidentiality was forever and carried one of the most entertaining and private, stories to a cocktail party.

Two months after Vern announced his intention to run for congress, a reporter at a news conference stood up and asked, "is it true that.....," and recounted the story Vern had thought had been safely entrusted to his forum.

If I don't tell you everything, you won't figure out who I mean.

Rahul returned from his forum meeting and remarked to his wife, "You won't believe what some people will do. There's one guy in my forum who has a brass picture frame manufacturing company with sixty employees. He's tight on cash, so he isn't depositing his employee's payroll tax withholdings. He and his sister own the business 50/50 and she is the sales manager, but now they're not talking, so he doesn't know what she's doing in sales and she doesn't know what he's doing with the payroll tax withholdings."

When asked by his wife whether telling this story might violate forum confidentiality, Rahul responded, "I kept it confidential. I didn't tell you who the company was."

Where is that Nickname from?

Roger joined his forum for their retreat in Wyoming. Roger had been given some health warnings by his doctor, though he had not shared that fact with the group. Part of his health improvement plan was to quit smoking, but he had not told his forum group of his plan, nor had he told them that his smoking was the primary obstacle to his reuniting with his wife. The forum knew of the separation, and also knew that both Roger and his wife wanted to find a way to make things work. The couple had "dates" together, including YPO events, but were living apart.

Since Roger was the only smoker in the forum, he was often the subject of well-intentioned banter about his habit. After dinner at the retreat, Roger was at the edge of the clearing smoking his customary 2-3 cigarettes when one of the members joked, "what are you doing, Roger, sending us smoke signals from the trail?" After the laughter and a series of add-on jokes such as semaphore being healthier, Roger received the nickname "Scout." The nickname was well broken in and entrenched in the forum's habits by the end of the retreat.

At the next month's chapter meeting, Roger and his wife arrived and Roger was immediately greeted as "Scout" by one of the forum members. When his wife asked what "Scout" meant, the forum member laughingly said, "it's because Roger smokes so much he reminds us of an Indian scout sending up smoke signals."

Believe Everything You Read In The Papers

The Wilson Brewing Company had been the focal point of the town of Middleton for eight decades and three generations of Wilson family ownership. Wilson Beer was a household name in America, yet the company's competitiveness had declined as inter-family squabbling had grown. The current Wilson President, Kate, a YPOer in forum, saw her company go bankrupt, in part because of one branch of her family that wanted current dividends more than they wanted a viable company in the future. As this branch of the family made the president's life more and more difficult, they became increasingly critical of her management as well. The criticism was fueled by resentment from some of the more conservative family members that a woman was in charge of a company that had started from a tradition of tough, hard-talking and hard-drinking Wilson men. The forum group had seen the entire process unfold, and they were convinced the situation was unmanageable. They felt strongly that Kate was an excellent manager in an impossible situation.

The story made "The Wall Street Journal", the trade journals, and "Business Week". The most critical stories were in the local press, where the dissenting side of the family found an easy avenue to blame Kate. Kate refused to be drawn into the public debate and refused interviews.

One of Kate's forum members was sitting at a business luncheon when the topic of the newspaper articles came up. Everyone around the table talked "knowingly" about what a poor manager Kate was, and several intimated that it was because she was a woman. At that point the forum member "lost it" and quickly argued against everything in the article, point by point. In his arguments he brought up several details that had only been mentioned in forum.

A week later he saw his statements reprinted in the business section as coming "from a knowledgeable source."