
The Meaning of Confidentiality

Choose one of the following questions and give each person 1-2 minutes to respond.

Describe the character traits of a person you completely trust.

Describe a time in your personal/professional life when someone breached confidentiality. Why was it a breach?

Do you believe that true confidentiality can exist in this world of communication? Why did you answer “yes” or “no”?

Creating a Shared Vision

Overview: The success principle of co-creating a Shared Vision can be exercised and achieved at a forum retreat by using this process.

Description: The questions that follow will lead to a robust discussion of a shared vision, purpose and values. Select those that you believe will most resonate with your forum. Have each member answer them and then discuss each member's answers to determine a shared vision, purpose and values for the group.

Instructions

- Invite each member to take their own notes on each question. (5-10 min.)
- Ask each member to present. (5-10 min.)

Appoint a member to take notes on a flip chart as each member shares his or her thoughts.

Appoint another member to be timekeeper to keep everyone on track.

Look for common themes that resonate with all to achieve buy-in and commitment.

1. What are your forum's top three ideal values?
2. What is your vision for your forum?
3. How do you feel your vision aligns with that of the other members in your group?
4. Three years from now, if you look back upon your membership in this forum, what do you hope to have achieved?
5. What are you willing to give in order to achieve that hope?

- Closing: If you are using this exercise to create a vision/mission statement. Provide "next steps" so everyone is aware of what you are doing with this information.
- Closing: Ask everyone to say one word about how they feel after the exercise. If you prefer, you can extend the closing comments to 30 seconds per person.

“Clean Talk” Issues Clearing Model

Use this model when you want to be in a solid relationship with another person. An individual typically wants to be in a trusting relationship with his/her spouse, children, extended family, and with his/her business associates. We are typically **not** in ongoing relationships with others with whom we have infrequent, business or non-personal-sharing encounters.

The model is **not** specifically intended for issue **resolution**, although that may result. Its primary use is so that two parties are not being distracted by an unspoken issue between them. The model is used when one **cannot be fully engaged** mentally and emotionally in the relationship unless the issue is “cleared” with the person.

Anger, anxiety, resentment, embarrassment or other emotions that block the development of trusting relationships between any two people on a team will cause a weakness on that team. Conflict is a normal part of every day living – learning to address it is a valuable life skill.

When to Use: When all other methods of resolution have been exhausted usually because regular dialogue has broken down because of tension, frustration and other emotions present in one or both parties

It is also used to produce unusually clear communication between two parties – where absolute clarity is desired.

General Rules and Guidelines

- Both parties must know the model; both must agree to follow the rules.
- Parties must repeat each other verbatim-paraphrasing is to be avoided.
- Agreement on the Facts is not required.
- Resolution is not required. The purpose is to be heard – Issues are cleared and no longer hidden.
- Party B may respond informally, not at all, or the preferred method is to use the model by switching positions.

Party A

You want to get clear with Party B. Invite the person to sit with you for this purpose.

Think carefully and state clearly as outlined below. Remember that Party B must be able to repeat back everything you say *verbatim*.

Here are my:

- Facts

"These are the facts, circumstances, and situation as I see it...". (Be clear)

- Feelings

"My feelings are, as I experience them...".
Examples include: anger, frustration, sadness, joy, sorrow, surprise, disappointment, embarrassment. It's about emotions.

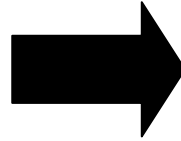
- Judgments

"This makes me think..." State the opinions, conclusions, thoughts, and reactions you have about the issue.

- What I want is...

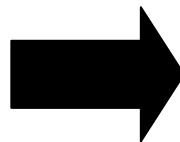
"What I want is..." Explain to "B" what you want. "B" may or may not provide it in this moment. "B" may reverse and become "A".

Clean Talk Issues Clearing



**PARTY B
MUST
LISTEN
CLOSELY**

**THEN
REPEAT
WHAT WAS
SAID
EXACTLY
AS PARTY A
SAID IT!**



Party B

Listen carefully and prepare to state clearly exactly what Party A has said. Repeat the Facts, Feelings, Judgments and Wants *verbatim*. Keep notes if you need to, or ask A to repeat as often as necessary.

**Let me see if I understand you accurately.
Your...**

- Facts...

These are the facts, circumstances, and situation as you see them. (Be clear)

- Feelings...

"You are feeling..." Repeat the feelings expressed by "A"

- Judgments

"In your judgment..." Repeat the opinions, conclusions, thoughts, and reactions of "A"

- What You want is...

State the response, reaction, and action "A" would like to see. **THEN ASK:**

1. IS THERE MORE?

2. ARE YOU CLEAN WITH THIS?

Title:	Issues Clearing Model
Type :	Forum Exercise/Retreat Exercise
Date:	June 2011
Topic :	Forum Health
Sub-Topic	Conflict Resolution, Issues Clearing
Audience:	Forums/ All
Categories	Personal Development/Retreats
Submitted By:	
Key Words (Tags):	Issues Clearing, Clearing the Air, Conflict Resolution, Healing, Appreciation
Materials Required:	

Overview:

The Issues Clearing Model is a tool to support Forums resolve challenging or difficult situations that often arise out of misunderstanding, miscommunication and/or missing up facts and emotions. This process allows for a way to navigate those tough issues.

Use this model when you want to be in a solid relationship with another person. An individual typically wants to be in a trusting relationship with his/her spouse, children, extended family, and with his/her business associates. We are typically not in ongoing relationships with others with whom we have infrequent, business or non-personal-sharing encounters.

The model is not specifically intended for issue resolution, although that may result. Its primary use is so that an unspoken issue between them is not distracting the two parties. The model is used when one cannot be fully engaged mentally and emotionally in the relationship unless the issue is “cleared” with the person.

Anger, anxiety, resentment, embarrassment or other emotions that block the development of trusting relationships between any two people on a team will cause a weakness on that team. Conflict is a normal part of every day living – learning to address it is a valuable life skill.

Description:

The tool takes practice and using hypothetical examples is a productive way to learn the process so it may be implemented in real-time when the occasion arises.

Participants should work in pairs, using the Issues Clearing Prompt Sheet below.

Each person will select a hypothetical issue that could arise in Forum. (For instance, a member is always late, a member uses excessive bad language, a member is condescending to other members in a particular industry).

Each pair will designate Partner A and Partner B.

Partner A tells Partner B what role they are playing, (i.e. “you are a member who always arrives 5 to 20 minutes late).

Partner A plays the speaker’s role while Partner B plays the listener’s role.

Once the listener (A) has reflected back, conduct another issues clearing, using a different issue. This time Partner B will be the speaker and Partner A will be the listener.

When issues exist...

Ask the members with the issue to clear their issue using the Issues Clearing model. In most cases, this issues clearing can be performed in private, away from the other members

Person with the issue starts:

“I have an issue I’d like to clear with you. Is now a good time? (If not now, agree on a time.)

“The specific **facts** are ...” (Recordable facts; not judgments)

“I make up a story that...” or “I make this mean...” (I think...; In my opinion ...; My **judgment** is...)

“I **feel**...” (sad, angry, scared, ashamed, guilty, excited, numb, happy...)

“**My part in this** is ...” (Your role in creating or sustaining the issue)

“And I specifically **want**...”

Other person reflects back:

“Let me see if I understand you...” (Reflect or paraphrase without interpretation; Goal: seek to truly understand without rebuttal.)

(After reflecting, ask) “Is that accurate?” (If not, reflect again.)

“Is there more?” (This is a crucial question. Ask in a kind, genuine, curious, want-to-be-in-relationship voice.)

“Are you clean about this?” (If “yes,” you’re done!)

Vision and Shared Purpose

Choose one of the following questions and give each person 1 minute to respond.

In one word, describe the outcome of a “shared vision and purpose” of any team. Then, explain your reason for using that word.

Describe a time, in business, that you were part of a team with clear vision and purpose. What did that look like?

Describe a time, in business, that you were part of a team without clear vision or purpose. What did that look like?

Describe a time, in your personal life, that you were part of a “team” with a clear vision or purpose. What did that look like?

Describe a time, in your personal life, that you were part of a “team” without a clear vision or purpose. What did that look like?

Title:	Confidentiality Case Studies - Business
Type :	Case Study/Forum Exercise/Retreat Exercise
Date:	June 2011
Topic :	Forum Health
Sub-Topic	Confidentiality
Audience:	Forums/All
Categories	Meetings/Retreats
Submitted By:	
Key Words (Tags):	Confidentiality, forum health, breaches
Materials Required:	

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:

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.

Title:	Confidentiality Case Studies – Business 2
Type :	Case Study/Forum Exercise/Retreat Exercise
Date:	June 2011
Topic :	Forum Health
Sub-Topic	Confidentiality
Audience:	Forums/All
Categories	Meetings/Retreats
Submitted By:	
Key Words (Tags):	Confidentiality, forum health, breaches
Materials Required:	

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.

Case Study:

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 last year 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 futures look terrific.

Title:	Confidentiality Exercise
Type :	Case Study/Forum Exercise/Retreat Exercise
Date:	June 2011
Topic :	Forum Health
Sub-Topic	Confidentiality
Audience:	Forums/All
Categories	Meetings/Retreats
Submitted By:	Manju Melwani
Key Words (Tags):	Confidentiality, forum health, breaches
Materials Required:	

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 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 have a discussion with people in their corner on why they agree or disagree and then 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. 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, carefully write somewhere else concurrently. Be sensitive to all materials. Is your email password protected?
5. It's all right to tell a mutual friend that the member has come in late.	Disagree. Everything at a forum is confidential. Confidentiality is absolute and total.
6. A member has stated that she has started to take French lessons. You want your daughter to learn and that one of your forum mates is	Disagree Then, how do you go about it?

learning the language. You tell your daughter.	Ask the member's permission to say.
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>