



Forum meeting tools

Forum meeting tools

Focused on better coaching, deep dives, 5% Reflections, Forum meeting alignment, values, purpose, etc.

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1. Creating your Forum vision

EO chapter	Pittsburgh
Shared by	Andrew Bradigan
Type of exercise (icebreaker, team-building, closing, etc)	Team-building, brainstorming
Time required for this exercise	60 minutes
Objective of the exercise	To create a vision for the Forum moving forward
Outcome of the exercise	Getting to know each Forum member better in order to create a vision for the Forum
Tools needed	Whiteboard/flip chart, markers, "Creating your Forum vision" worksheet, timer
Handouts and pre-work if any	Creating your Forum vision worksheet
Description of the exercise Worksheet, verbal responses, recording of responses, brainstorming, consolidation of responses into one sentence.	
Step-by-step instructions Provide a "Creating your Forum vision" worksheet and ask each member to answer each question. Have each member verbally provide their answers and write them on the whiteboard/flip chart. After all answers are written down, circle all common themes and begin to group these common themes together into words/phrases. Finally, create a one-sentence vision statement using these common words/phrases.	
Debrief questions/notes Use the vision statement throughout the year to remind each other why we are a Forum and what we strive for.	

2. Improve 5% Reflections

EO chapter	Pittsburgh
Shared by	David Levine
Type of exercise (icebreaker, team-building, closing, etc)	5% Reflections
Time required for this exercise	2 minutes per person
Objective of the exercise	Identify weaknesses in giving reflections, and identifying more in-depth points for discussion
Outcome of the exercise	Improve 5% Reflections and its benefits
Tools needed	None
Handouts and pre-work if any	None
Description of the exercise Go around the table and have everyone recount their most recent 5% Reflection. Then identify which part of the 5% Reflections focused on facts, and which focused on feelings. Intentionally draw out more focus on how the event described made you feel, so that the group attention, and your own, can be focused on that, rather than focused on raw facts.	
Step-by-step instructions See above.	

3. Practice coaching

EO chapter	Pittsburgh
Shared by	David Levine
Type of exercise (icebreaker, team-building, closing, etc)	Coaching a deep dive
Time required for this exercise	20 minutes
Objective of the exercise	Demonstrating techniques for coaching a deep dive to maximize benefit
Outcome of the exercise	To experience a coaching session, following guidelines and identifying best practices to get optimal deep dives for maximum feedback
Tools needed	None
Handouts and pre-work if any	Coaching worksheet
Description of the exercise Follow coaching guidelines with a Forum mate on a selected topic for a deep dive, while others watch the process.	
Step-by-step instructions See above description.	

4. Forum debate

EO chapter	Boston
Shared by	Praveen Ramanathan
Type of exercise (icebreaker, team-building, closing, etc)	Perspective gathering
Time required for this exercise	30-40 minutes
Objective of the exercise	The objective of the exercise is to help with decision-making. With a goal of quickly laying out all the considerations of a particular question/scenario/issue and understanding these various facets to ultimately help arrive at a decision.
Outcome of the exercise	Outcome is a clear list of all considerations around a specific question/scenario/issue.
Tools needed	Pen, paper and a flip chart
Handouts and pre-work if any	None
<p>Description of the exercise</p> <p>Likely the best way to describe this is through an example. The item on the table might be, "Is it important to have a mid-year retreat for our Forum?" The Forum members split into two groups: One for having a mid-year retreat and the other for not having a mid-year retreat. One of the members is elected as a neutral judge. It does not matter what the actual perspective of the individual member is. Once they are on a team, they are debating that side.</p> <p>Each team gets 5 minutes to prepare their case, arguing either for or against. An elected leader from each team offers their team's perspective (3-5 minutes). After both teams have laid out their perspective, the teams go back to their corners to prepare counter-arguments (another 5 minutes). Then an elected presenter from each team presents their team's perspective. After a third round, the debate ends and the judge/note-taker lays out all the arguments for and against. The Forum can then conduct a formal vote to determine what they would like to do.</p>	
<p>Step-by-step instructions</p> <p>See above description.</p>	

5. Reflecting on the day

EO chapter	Idaho
Shared by	Kelly Perryman
Type of exercise (icebreaker, team-building, closing, etc)	Closing
Time required for this exercise	20-30 minutes
Objective of the exercise	To give each person a chance to reflect and afford others the opportunity to learn from the experiences of their Forum mates
Outcome of the exercise	Getting everyone's input on what they learned throughout the day makes for a good closer to Forum.
Tools needed	Paper
Handouts and pre-work if any	None
Description of the exercise Wad together a couple pieces of paper into a tight ball. The ball will be thrown from one Forum member to another, and whoever is holding the paper ball will share experiences from the day, such as: What things they learned, what stood out to them the most, what will they take away from the day, etc. The ball will be passed on until everyone has a chance to speak.	
Step-by-step instructions See above description.	

6. What worked, what didn't

EO chapter	San Francisco
Shared by	Rudolph Mutter
Type of exercise (icebreaker, team-building, closing, etc)	Closing
Time required for this exercise	5-20 minutes
Objective of the exercise	Get immediate feedback for the next retreat or Forum meeting while it is still relevant and top of mind
Outcome of the exercise	Iteration and improvements to subsequent Forum retreats and meetings
Tools needed	None
Handouts and pre-work if any	None
<p>Description of the exercise A round-table discussion at the end of a Forum retreat or meeting where you prompt the group for immediate feedback and facilitate a discussion.</p>	
<p>Step-by-step instructions</p> <ol style="list-style-type: none"> 1. Prompt the group by asking, "What worked? What didn't? Did you get what you came for?" 2. Facilitate a discussion, one question at a time. Take detailed notes of positive and negative feedback. 3. Try to ascertain if the group is in agreement on feedback, but don't try to make any definitive decisions in the moment. 4. Keep the discussion to comments and suggestions; this is not a debate. Keep it action-oriented and avoid complaining. 5. It's good to do a "closing word" after this exercise. 	
<p>Debrief questions/notes Moderator/facilitator should review all notes and come to some decisions on how to iterate for the next retreat/meeting.</p>	

7. Closing gratitude for monthly Forum meeting

EO chapter	Idaho
Shared by	KaLinn Dishion
Type of exercise (icebreaker, team-building, closing, etc)	Closing
Time required for this exercise	1-2 minutes per person
Objective of the exercise	Leave with a positive mindset and acknowledge themselves (which rarely happens)
Outcome of the exercise	Feeling good
Tools needed	A state of gratitude
Handouts and pre-work if any	None
Description of the exercise Gratitude to self and others	
Step-by-step instructions In closing, please share a gratitude you have for someone in your life or something someone did for you this past month. Then share a gratitude you have for yourself, something you did (or didn't do), something you learned and something you appreciate about yourself.	
Debrief questions/notes It is surprisingly easy to be grateful to someone else in your life, but most people find it challenging to voice a gratitude to or about themselves. This exercise creates self-awareness and self-acknowledgement.	

8. Forum value triangle 1.2

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Forum meeting tools
Time required for this exercise	
Objective of the exercise	To find out where members find value in their Forum experience
Outcome of the exercise	What, how and where does the GROUP want to create more value for each other, and themselves? A great outcome of this discussion is agreement on some specific activities, behaviours, discussions and topics that would create more of what the group wants.
Tools needed	
Handouts and pre-work if any	

Step-by-step instructions

Value triangle - Where do we find value from our Forum experience?

Directions

- Give each member a copy of the Triangle found on the next page, the one with just the triangle in the centre.
- Read the descriptions on the next page out loud to the group. For each of the "points" of the triangle, encourage a short discussion in your group of what those corners could mean in your Forum. It is helpful if there is shared understanding of the three "axis" points.
- Ask each member of the Forum to put a dot in the approximate spot that would represent the current value they receive from Forum, approximating the distance from each corner as representing where the value they have recently been getting from Forum sits. Make the size of the dot represent how much of this value they have been receiving. Don't compare with each other—mark your dot on your sheet.
- Then, ask them to draw a line from their dot to where they would like to shift toward on the value triangle based on their current trajectory in life. Then connect those dots as an arrow (with the arrow head on the end pointing to their ideal ratio of value).
- Then put a flip chart up with the triangle drawn in the centre, and the corners marked exactly as on their sheets. Ask each Forum mate to bring their sheet to the front and copy exactly what they drew on their sheet onto the big flip chart, with their dots and arrows. They can put their initials on their arrow if they would like. Different coloured markers are helpful if there are tight groupings or crossing lines.
- Allow time for the group to ponder the drawing you have created. Then, lead a group decision: What does the group see? What do they notice? What is surprising? What did they already "know"? What is their interpretation of what the groupings or directions of the arrows mean? You can do this "popcorn" style or by making space for each member to speak.
- A group member that is an "outlier" or wants less of some value may have good resources outside of the Forum – and thus is not "opposed" to more of "that," but rather isn't specifically looking for it inside the Forum.
- What, how and where does the group want to create more value for each other – and themselves? A great outcome of this discussion is agreement on some specific activities, behaviours, discussions, topics that would create more of what the group wants.
- You, as Moderator, can hopefully gain group agreement as to some specific changes for upcoming Forum meetings – perhaps for the next year.

Value triangle corners

Value triangle corners

Connection:

We "belong" in this group – they are our tribe; we enjoy each other's company and we understand each other. Connection activities can be inside a Forum meeting or between meetings – enjoying meals together, activities, spending time with families (spouses and/or children), sharing stories of our fun activities and doing activities together. We love hanging out and sharing with each other.

Business tactics and tools:

Take back and implement in my business: tools, strategies, processes, agreements and other "plug and play" info that I can use in my business, and use to make improvements in the near term. I connect with trusted experts, learn about other industries and am introduced to people, tools, software, processes, systems and manuals that I can adapt and use. We are efficient and effective within our Forum. We go deep sometimes, if we need to.

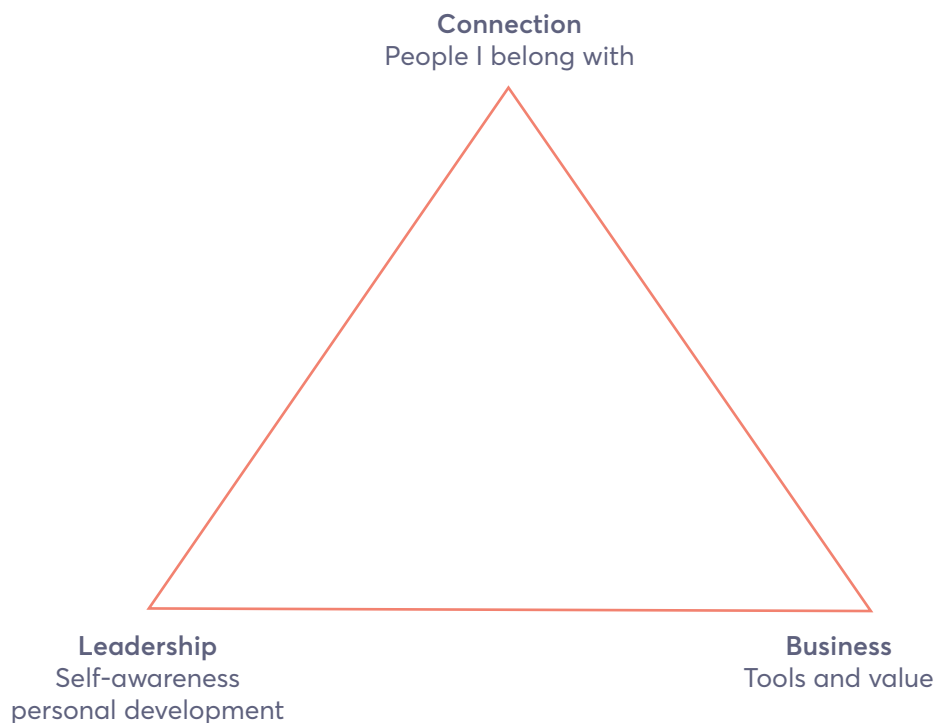
Leadership self-awareness/Personal development:

I want to see myself more clearly; see into my blind window and view what I don't realize about myself, such as my impact and relationships with others. Developing into a more mature and effective leader is a journey, and those who are engaged and intimate with me – but not attached to my outcomes or the stories – can offer a lot of useful information. Our Forum is focused on the 5% ... we are very vulnerable and authentic.

Phil Kristianson

Forum Whisperer: phil@Forumwhisperer.com

Many thanks to Les Hayes for creative input and graphics, as well as Mo Fathelbab for the inspiration!



9. Clearing the air

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	
Time required for this exercise	
Objective of the exercise	
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

Clearing the air – Originator – Philip Kristianson, The Forum Whisperer (phil@theforumwhisperer.com)

Objective of the exercise

The foundation of a high-functioning Forum is its ability to maintain a safe environment. There are several fundamental behaviours that allow this safety to exist: Confidentiality, Forum Mindset (Gestalt) and personal responsibility. A behaviour that is at the core of personal responsibility is recognizing and acknowledging conflict. If a situation arises where a member feels conflicted about another member, their responsibility is to go to the source of that conflict and have a conversation with that person in order to put that conflict to rest for their own benefit, that of the other individual, and to maintain the safe environment of the Forum.

In a perfect Forum with all members dutifully practicing personal responsibility, nothing would have to be done to maintain this safe environment, which is foundational to creating a high-value Forum experience. The reality, however, is that no Forum is "perfect." Populated by humans with varying degrees of emotional intelligence, maintenance of the safe environment is often necessary.

One highly effective process introduced within the Forum communities and adopted by other Forum groups in EO, HBS Alumni Forums and others is called "clearing," "issues clearing," or "clearing the air." The details of this process have some variation across communities and Forums. What follows is a description of the process that I have evolved and used both in my own Forums, and with many other Forums in my role as a Forum retreat facilitator.

"Clearing the air"

Clearing requires someone to lead the group through the process. This can be an outside facilitator, the Forum's Moderator, or if the Moderator has something that they need to clear with another member, they can have their Moderator-elect or elect-elect lead the process. If the Forum is not experienced with this process and the Moderator is aware of a significant, unresolved conflict, then engaging a facilitator to both lead the process for the first time, as well as teaching the Forum how to utilize this process on their own at future meetings, may be a wise decision.

- Clearing the air can be used when needed, or more proactively on a quarterly basis as part of the Forum's annual rhythm.
- Ideally, make sure all members of the Forum have advanced notice that the clearing will be happening at the following meeting. This can be a catalyst for members who are aware of a conflict to reach out directly to a member they have a conflict with and work to resolve it one-on-one prior to the issues clearing in the Forum meeting.
- Schedule the clearing at the beginning of the meeting with enough space and flexibility in the agenda to avoid feeling rushed or running out of time, as the length of this process can vary. My experience has been that after a well-run clearing, members often feel very open to each other, and this can have a very positive impact on the safe environment for the balance of that meeting.

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9. Clearing the air - continued

- Whoever is leading the clearing process should be the first to share, setting the tone and allowing that person to focus all of their attention to facilitating the overall session.
- There are three parts of the clearing process.
 1. The first round
 2. The clean-up round
 3. (Optional) The facilitated communication session if there are still any members who are not clear with each other after the clean-up round.

Note: If the members who have an unresolved conflict have not discussed this before, then they may wish to get together prior to the next Forum meeting on their own. If they have already tried to resolve the conflict and have been unsuccessful and are not comfortable processing the conflict with the facilitated communication process in front of the Forum, they are welcome to have the facilitated communication done mid-month with the assistance of the Moderator or another member of the Forum. The advantage of having the facilitated communication take place in the Forum meeting is that it allows all members to become more comfortable with this part of the process and develop the skill themselves, which can be utilized in other parts of their lives.

a. The first round

The person leading the clearing starts with the member on their left and looks directly into the eyes of that member for the amount of time it takes to take a deep breath in and out, and checks in with themselves to see if anything is getting in the way of them being clear with that person. This starts by seeing if any negative feelings bubble up. If there are none, then verbalize "I am clear with you." If there is something, then verbalize "I am not clear with you," and communicate the feelings you are having and why you are having them. This lack of being clear or clean with someone tends to either be because you have done or said something, or not done or said something, that is getting in the way of you being clear with them.

Example: "Bill ... I am not clear with you. I told you that we would meet up, and I would share with you the hiring and on-boarding process we have adopted, and I had to cancel on you twice at the last minute. I have been feeling guilty about that and want to let you know that I meant no disrespect. I apologize and would like to commit to you that I will make it a high priority to meet with you as soon as it works for our schedules."

Or someone else has done or said something that is getting in the way of you being clear with them.

Example: "Sally ... I am not clear with you. At our last Forum meeting, I presented about the challenges that I am having with my teenage son. It was difficult for me, and I was feeling very vulnerable. You made some comment to Jim, and you both laughed. Given how raw I felt at that moment, the timing of your comment and laughter hurt me. I hadn't thought about it until I saw you at the beginning of the Forum meeting and the feelings immediately came back."

Notice in both cases that the person shared their reality without judgment or accusation. We are all allowed to feel what we feel as long as we don't blame others for our feelings. The person leading the clearing should be listening carefully and observing not the person speaking, but instead the person being spoken to, in order to both hear and see if they are feeling judged. If so, coach the person who is doing the clearing to share their piece of what is keeping them from being clear.

There is no response back from any of the Forum members. The person leading the clearing thanks each member after they have cleared all the way around the Forum. Each member takes their turn until all have spoken, concluding round one.

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9. Clearing the air - continued

b. The clean-up round.

The person leading the clearing starts the clean-up round by looking around the circle to see if there is any residue left with anyone, and then shares anything they need to share, making sure they are clear. This goes more quickly and doesn't require looking each person in the eyes and stating that they are clear. Either you are clear with everyone or you are unclear with someone, and again, you share your feelings. Each member then does the same. This clean-up round allows the Forum members who went early in the first round to address anything that came up after they cleared. This could come in the form of a clarification or an apology. If everyone is clear after the clean-up round, then thank everyone for participating and move on to the next item on the agenda. If someone is still unclear, then there needs to be a brief discussion as to whether or not the group wants to support closure by having the person leading the clearing round facilitate a discussion between the two members. If a member is still not clear with another member and they have not yet met to discuss this, then that would be a good next step for them. If they have met but couldn't work through it on their own, then the facilitated discussion could happen in private prior to the next Forum meeting, or it could be done right after the clean-up round.

c. The facilitated discussion.

The two members who did not reach clarity in the first two rounds would sit across from each other with no table in between them, and with their profiles to the Forum group. The person facilitating the discussion would sit at 90 degrees to the two members facing the Forum. The following steps should then be taken:

Step 1. Ask each person to share with the other person something that they appreciate about the other. If it is evident that one member has a stronger issue than the other, start with them. Some people have the tendency to close down when someone is upset with them, and appreciation opens them back up and allows them to more clearly hear the other person. By identifying something that we appreciate in someone we feel hurt by, it reduces our tendency to attack.

Step 2. Again, select the member who has the stronger issue to start, or ask who wants to go first if the lack of clarity seems mutual. Ask person A to share with person B what it is that is causing them to be unclear with person B. Observe person B as person A is sharing, and then ask them to reflect back to person A what they have heard, then ask person A if person B was accurate. If person A feels that person B reflected them accurately, then ask person A if there is anything else they want to share. If they don't feel that they have been accurately reflected, ask person A to repeat what they wanted to share with person B, and have person B attempt to reflect it again.

Repeat this until person B feels that the reflection is accurate. Then ask person A if there is anything else. If there is, ask them to share it, and repeat the sharing and reflection process until person A says that there is nothing else. Now ask person B to tell you how they think person A is feeling. Check in with person A to see if person B is accurate, and if they feel anything else. Thank them both and ask person B what they want to share with person A, and then repeat the same process that you used with person A.

Note: You may need to interrupt the person sharing to allow the other person to reflect if the person sharing goes on too long, if their sharing has complexity of detail, or if you observe the person who is listening becoming defensive.

Repeat this facilitated communication process until both parties have been thoroughly heard and acknowledged.

10. Moderator scorecard

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Forum tools
Time required for this exercise	
Objective of the exercise	
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

Objective of the exercise

The Moderator scorecard is a method for you to assess your handling of 10 moderator skills and to get input from your Forum members. This assessment is best done after you have served as the Moderator for three to six months. By reviewing your self-assessment and the input from your Forum, you can consider possible changes to your style and/or actions as a Moderator. This optional exercise is intended to be a positive learning experience for you as the Moderator. Consider whether you will be comfortable reading the responses (regardless of how positive or negative they may be!) if you decide to use this exercise.

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Moderator Scorecard – Originator - Ellie Byrd (ellie@forumsherpa.com)

10. Moderator scorecard

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Step-by-step instructions

1. First, assess your perception of your own skills by completing the scorecard for yourself.
2. Next, have a candid discussion with your Forum about the scorecard and its purpose. Assure them that their responses will be held in complete confidence and that you will be using their input for your own self-improvement. The main purpose is for you to understand their perceptions and thereby improve the Forum experience for all members.
3. Distribute a copy of the scorecard to all Forum members and ask them to complete the form. This is best done at the end of the Forum meeting during housekeeping functions.
4. Collect the responses and wait until after the meeting to review them on your own.
5. You may want to make a list of areas where you feel you want to make changes, as well as a list of the areas where your own perceptions are vastly different from the perceptions of your Forum members. Consider how you might want to make changes in your style. You may want to share your plans with the Forum and ask them for their help in specific areas, if appropriate.

Moderator scorecard

Circle a number from 1 to 10 to indicate your impressions of the current Moderator's skills and handling of the Forum. If a topic is not applicable, skip the question.

LOW, WEAK HIGH, STRONG (1 2 3 4 ... 10)

Clarity and communication of Forum vision	1	2	3	4	5	6	7	8	9	10
Organization and planning skills	1	2	3	4	5	6	7	8	9	10
Listening skills	1	2	3	4	5	6	7	8	9	10
Communication clarity and consistency	1	2	3	4	5	6	7	8	9	10
Compassion when needed	1	2	3	4	5	6	7	8	9	10
Firmness when needed	1	2	3	4	5	6	7	8	9	10
Decision-making skills	1	2	3	4	5	6	7	8	9	10
Conflict-resolution skills	1	2	3	4	5	6	7	8	9	10
Commitment to Forum	1	2	3	4	5	6	7	8	9	10
Modelling the desired behaviors	1	2	3	4	5	6	7	8	9	10

Optionally, name one thing that this Moderator does particularly well:

Optionally, name one area where this Moderator could improve:

11. Listening and difference in meaning exercise

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Forum tools
Time required for this exercise	
Objective of the exercise	A simple exercise to illustrate the communication problem
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

Description of the exercise

Listening is a critical communication skill and involves much more than the act of just hearing what someone says. It takes into account not just the speaker's words but also body language, tone and emotion.

Step-by-step instructions

I didn't mean that!

When making a Forum "deep dive" (or engaging in any other form of communication), what the speaker says and what the listener hears can be two different things. Usually, the listener uses his own frame of reference in applying meaning to the speaker's words. The result is listeners think they have understood the speaker's point, but they are really internalizing a projection of themselves. In order to get around this, listeners must use "active listening," which takes into account not just the speaker's words, but also body language, tone and emotion.

A simple exercise to illustrate the communication problem is as follows: Give the Forum one word (suggestions: "family" or "love"). Each Forum member writes down 10 words that quickly come to mind when thinking of the given word. Divide the Forum into groups of three or four and have the groups compare lists. How many times was the same word on all three lists?

This is a well-known communication exercise, and the results are highly predictable. An unusual group will match two out of 10 words. More typical will be a match of one word or no matches across all three lists. Of course, the lesson is that we cannot begin to understand the speaker by focusing on words alone. Forum members need to use active listening to truly understand.

A related thought to share with the Forum is as follows: "The opposite of speaking isn't listening. The opposite of speaking is waiting to speak." This is especially true with EO groups. The listeners' real challenge during a Forum "deep dive" is to not mentally race ahead with the solution and wait to speak. When the listeners race ahead, they are not using their brain power for active listening. They are using their brain power to project personal assumptions and have probably misunderstood the presenter's message. Of course, any conclusions will probably be off-base.

12. Juicy questions for deep dives

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	
Time required for this exercise	
Objective of the exercise	Questions to help the presenter "dive deep"
Outcome of the exercise	
Tools needed	Juicy questions for deep dives.docx
Handouts and pre-work if any	

Set the stage:

- Outline the situation; what's going on? What's *really* going on?
- What do you want for yourself?
- What do you *really* want for yourself?
- What are the benefits to you for achieving_____?

Decisions

- What is your decision?
- What is your commitment?
- What agreement are you prepared to make?

Gather data:

- What information do you still need?
- What are your options?

Explore:

- How does the current situation serve you?
- What are your options?

Actions:

- Specifically, what will you do?
- How / By when will you_____?
- What would support for you look like?
- How will you measure progress / success?
- Who will hold you accountable? How?
- What are your boundaries / limits?

Gather data:

- How are you feeling about_____?
- I notice [*emotional signal*]; What's coming up for you now?

Blocks and fears:

- What's at risk to _____or for_____?
- Are you willing to take the risk? [Yes or No]
- What / Whom do you need to let go of?
- Are you willing to let go? [Yes or No]

Closure

- What / Who needs to be appreciated?
- What needs to be celebrated?
- What is the lesson learned?

13. Forum confidentiality case studies

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	
Time required for this exercise	
Objective of the exercise	To take the group closer to the real context of a situation or problem, and identify its cause and solution.
Outcome of the exercise	This exercise is great for sharing experiences and reaffirming Forum knowledge and understanding.
Tools needed	
Handouts and pre-work if any	

Step-by-step instructions

Case #1 - Good news or bad news, all news must be confidential

Sam made what he hoped would be the last detailed "deep dive" on the topic that he and his Forum group had been sharing ever since he joined EO. 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 "deep dive", 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 past few years had been an emotional burden on the entire Forum. Feeling that burden lifted boosted each member as the meeting ended.

Continued on next page ...

13. Forum confidentiality case studies - continued

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.

Case #2 - Kindness and concern can backfire

In the chapter, Forum meetings were scheduled just prior to chapter meetings. Forum members would spend four hours together and then the chapter would meet 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 five-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 and 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 five-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 EO 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 EO 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.

Continued on next page ...

13. Forum confidentiality case studies - continued

Case #3 - 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 EO Forum meeting. She was very supportive of his Forum involvement, and she never probed about what had taken place at the meetings. 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 "deep dive" from Henry.

Case #4 - 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 EO members."

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

Case #5 - Confidentiality is forever, isn't it?

Vern was a great source of stories while he was in EO. 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 he 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.

Continued on next page ...

13. Forum confidentiality case studies - continued

Case #6 - 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 60 employees. He's tight on cash, so he isn't depositing his employees' 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 owner was."

Case #7 - 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 EO 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, including some about 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."

Case #8 - 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, an EOer 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 fuelled 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.

Continued on next page ...

13. Forum confidentiality case studies - *continued*

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."

14. Forum and me

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	
Time required for this exercise	
Objective of the exercise	Focusing on openness and truth-telling in our Forum
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

Step-by-step instructions

1. Send form as pre-work.
2. Go around the group, question by question.
3. After each round, come to a consensus on what the Forum commits to doing and write it on a flip chart.
4. Repeat for each question.
5. At the end, add all commitments to the constitution and have everyone sign it.

Forum and me

1. How am I doing as a member of this Forum?
2. What is my role in this group?
3. Am I truly present in Forum? What distracts me? What prevents me from being 100 percent present?
4. How do I think people perceive me in Forum? Am I this person outside of Forum?
5. What do you appreciate about all of the other Forum members?
 - a.
 - b.
 - c.
 - d.
 - e.
 - f.
6. What gift/talent of each member of Forum do you think he/she is not using in Forum?
 - a.
 - b.
 - c.
 - d.
 - e.
7. What is my definition of success for this Forum (vision/purpose/why do I do this)?
8. What values must be present in my Forum?

Rate from 1-10 the Forum success principles:

Shared vision, purpose and values 1 2 3 4 5 6 7 8 9 10

Confidentiality 1 2 3 4 5 6 7 8 9 10

Commitment 1 2 3 4 5 6 7 8 9 10



Develop topics (from MTP programme)

- a. Relationships
- b. Aging parents
- c. Raising children with values
- d. Dreams
- e. Life is difficult
- f. Risk
- g. Life's greatest fears
- h. Employee motivation
- i. Discovery questions
- j. Life assessment
- k. Life's walk
- l. Design a topic
- m. Topical discussion

Develop topics: Relationships

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Develop topics (from MTP programme) Deep dive/Meeting tools
Time required for this exercise	
Objective of the exercise	Develop topics for your alternate "deep dive" format
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p>Description of the exercise</p> <p>Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.</p> <p>Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.</p> <p>In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.</p>	

Develop topics: Relationships

Step-by-step instructions

SAMPLE TOPICS

1. Work/life balance
2. Fulfilment and meaning in life
3. Coping with loss (eg, life after divorce, death of family member or friend)
4. Replacing fear with faith and hope regarding illness of self or a family member
5. Defining success (eg, from success to significance)
6. Disappointment and disillusionment
7. Dealing with the challenges of a new workforce (eg, work ethic, commitments, values, motivation and reward)
8. Identifying high-potential people—mentoring and development
9. Aging parents
10. Rearing children

TOPIC: RELATIONSHIPS

Instructions: Think of someone in your life with whom you have an unresolved conflict or a conflict that you would like to resolve. Then answer the following questions:

1. Who is the person? And what is your relationship to that person?

2. Describe the relationship as it is today.

3. Describe the relationship as you would like it to be.

4. Describe the conflict.

- a. What is the nature of the conflict?

- b. What would it take to resolve the conflict from your perspective?

- c. What do you believe it would take to resolve the conflict from the other person's perspective?

5. Call to action:

- a. What action(s) could you take to move the conflict toward resolution?

- b. Will you take that action?

- c. If so, when?

Develop topics: Aging parents

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Meeting tools 1.1
Time required for this exercise	
Objective of the exercise	Develop topics for your alternate "deep dive" format
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

Description of the exercise

Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.

Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.

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Develop topics: Aging parents

Step-by-step instructions

TOPIC: AGING PARENTS

Communication starter: Have each member fill in the blank for the following statement.

My greatest fear about aging is _____.

Background: Go around and have the members provide a brief overview of their parents' current circumstances.

Guided discussion questions:

1. What are our responsibilities to our aging parents? Regarding their:

a. Financial needs?

b. Physical needs?

c. Emotional needs?

d. Spiritual needs?

2. When you see a need that your parents won't let you fulfil, do you accept it or force your way in? If you step in, how do you do that?

a. How do you negotiate a lifestyle change with your parent?

b. How do you handle the role reversal?

c. How do you manage aging parents' care long-distance?

d. How do you manage sibling relationships?

3. What are you teaching your children?

4. Are your affairs in order?

Close: Read The Wooden Bowl (on next page).

Continued on next page ...

Develop topics: Aging parents - *continued*

THE WOODEN BOWL

A frail, old man went to live with his son, daughter-in-law and four-year-old grandson. The old man's hands trembled, his eyesight was blurred, and his steps faltered.

The family ate together at the table. But the elderly grandfather's shaky hands and failing sight made eating difficult. Peas rolled off his spoon onto the floor. When he grasped the glass, milk spilled on the tablecloth.

The son and daughter-in-law became irritated with the mess. "We must do something about Grandfather," said the son. "I've had enough of his spilled milk, noisy eating and food on the floor."

So, the husband and wife set a small table in the corner. There, Grandfather ate alone while the rest of the family enjoyed dinner. Since Grandfather had broken a dish or two, his food was served in a wooden bowl.

When the family glanced in Grandfather's direction, sometimes he had a tear in his eye as he sat alone. Still, the only words the couple had for him were sharp admonitions when he dropped a fork or spilled food.

The child watched it all in silence. One evening before supper, the father noticed his son playing with wood scraps on the floor. He asked the child sweetly, "What are you making?" Just as sweetly, the boy responded, "Oh, I am making a little bowl for you and Mama to eat your food in when I grow up." The child smiled and went back to work.

The words so struck the parents that they were speechless. Then tears started to stream down their cheeks. Though no word was spoken, both knew what must be done.

That evening, the husband took Grandfather's hand and gently led him back to the family table. For the remainder of his days, he ate every meal with the family. And for some reason, neither husband nor wife seemed to care any longer when a fork was dropped, milk spilled or the tablecloth soiled.

Develop topics:

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Meeting tools 1.1
Time required for this exercise	
Objective of the exercise	Develop topics for your alternate "deep dive" format
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p>Description of the exercise</p> <p>Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.</p> <p>Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.</p> <p>In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.</p>	

Develop topics: Raising children with values

Step-by-step instructions

TOPIC: RAISING CHILDREN WITH VALUES

Communication starter: The one thing I want most for my children is:

Guided discussion questions:

1. What are your five most important values?

- a. _____
- b. _____
- c. _____
- d. _____
- e. _____

2. How do you communicate your values to your children?

3. How do you deal with situations where your children fail to honour your values?

4. Would your children describe you as someone who "walks the talk"?

Close: With a word of caution:

Be careful

Be careful of your thoughts for your thoughts become your words. Be careful of your words for your words become your actions. Be careful of your actions for your actions become your habits. Be careful of your habits for your habits become your character. Be careful of your character for your character becomes your destiny.

Develop topics: Dreams

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Meeting tools 1.1
Time required for this exercise	
Objective of the exercise	Develop topics for your alternate "deep dive" format
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p>Description of the exercise</p> <p>Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.</p> <p>Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.</p> <p>In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.</p>	
<p>Step-by-step instructions</p> <p>TOPIC: DREAMS</p> <p>1. Growing up, did you have a dream for your life? If yes, what was it?</p> <p>_____</p> <p>_____</p> <p>2. Did you follow that dream? If not, what stopped you?</p> <p>_____</p> <p>_____</p> <p>3. Do you have a dream today? If yes, what is it?</p> <p>_____</p> <p>_____</p>	

Develop topics: Life is difficult

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Meeting tools 1.1
Time required for this exercise	
Objective of the exercise	Develop topics for your alternate "deep dive" format
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p>Description of the exercise</p> <p>Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.</p> <p>Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.</p> <p>In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.</p>	
<p>Step-by-step instructions</p> <p>TOPIC: LIFE IS DIFFICULT</p> <ol style="list-style-type: none"> 1. What has been the most difficult period of your life? <hr/><hr/> 2. What resources did you draw upon to survive? <hr/><hr/> 3. What resources were you lacking? <hr/><hr/> 4. What lessons did you learn? <hr/><hr/> 	

Develop topics: Risk

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Meeting tools 1.1
Time required for this exercise	
Objective of the exercise	Develop topics for your alternate "deep dive" format
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p>Description of the exercise</p> <p>Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.</p> <p>Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.</p> <p>In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.</p>	
<p>Step-by-step instructions</p> <p>TOPIC: RISK</p> <ol style="list-style-type: none">1. What is the riskiest thing you have ever done? _____ _____2. How did it make you feel? _____ _____3. What did you learn from this experience? _____ _____4. What would be a risky thing for you to do at this time? _____ _____5. What would be risky for you to do in this Forum? _____ _____6. How could the Forum help you in accomplishing what you would like to do? _____ _____	

Develop topics: Life's greatest fears

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Meeting tools 1.1
Time required for this exercise	
Objective of the exercise	Develop topics for your alternate "deep dive" format
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p>Description of the exercise</p> <p>Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.</p> <p>Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.</p> <p>In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.</p>	
<p>Step-by-step instructions</p> <p>TOPIC: LIFE'S GREATEST FEARS</p> <p>Instructions: Have members list their three greatest fears, the cause or source of those fears and the impact or consequences of holding onto those fears.</p> <p>Examples:</p> <ul style="list-style-type: none"> • Fear: Not making a difference. • Cause/source: My ego. • Impact/consequence: I am so busy looking for a chance to make a big difference that I miss the little opportunities that are present on a daily basis. • Fear: That something bad will happen to one of my children. • Cause/source: A friend/neighbour's child was killed in a tragic accident. • Impact/consequence: I am overprotective of my children, and they resent me. 	

Develop topics: Employee motivation

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Meeting tools 1.1
Time required for this exercise	
Objective of the exercise	Develop topics for your alternate "deep dive" format
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p>Description of the exercise</p> <p>Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.</p> <p>Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.</p> <p>In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.</p>	
<p>Step-by-step instructions</p> <p>BEST PRACTICES</p> <p>Employee motivation</p> <ol style="list-style-type: none"> Describe your performance planning and review process. _____ How do you handle employee incentives and bonuses? _____ What employee benefits do you provide? _____ How do you communicate with employees? And what do you communicate? _____ How do you celebrate with employees? And what do you celebrate? _____ 	

Develop topics: Discovery questions

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Self-disclosure
Time required for this exercise	
Objective of the exercise	Develop topics for your alternate "deep dive" format
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

Description of the exercise

Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.

Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.

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Step-by-step instructions

DISCOVERY QUESTIONS

1. **Who's who?**
 - a. What do you do?
 - b. Who are you?
 - c. Describe an important person who has had a significant influence on your life.
 - d. Three words that describe you
2. **Dreams**
 - a. Did you have a dream growing up?
 - b. If so, what was it?
 - c. Did you follow that dream?
 - d. If not, what stopped you?
 - e. Do you have a dream today?
 - f. If so, what is it?
3. **Describe what it was like for you growing up.**
4. **Risks**
 - a. What is the greatest risk you ever took?
 - b. What made it so risky?
5. **Describe a missed opportunity in your life.**

Develop topics: Discovery questions

6. Joy

a. What has been the most joyful moment in your life? (exclude marriage or birth of a child)

b. And what made it so joyful?

7. Life is difficult

a. What has been the most difficult period of your life?

b. What resources did you use to survive?

c. What resources were you lacking?

d. What lessons did you learn?

8. What has been your greatest achievement? And what made it so great?

9. What has been your greatest disappointment (or failure)? And what made it so disappointing?

10. Life's fears

a. What are your three (3) greatest fears?

b. What is the source or cause of each of those fears?

c. What price do you pay for holding onto each of those fears?

11. If you weren't doing what you're doing, what would you be doing?

12. What legacy would you like to leave?

Develop topics: Life assessment

LIFE ASSESSMENT SURVEY

Date _____ Name _____

Instructions

On each of the following items, enter the number that you believe is true for you at this point in your life. If the question doesn't apply to you, skip it.

What is your perception of how you have done in terms of ... 1 to 10 (Low) (High)

1. Finding meaningful and fulfilling work? _____
2. Finding a suitable spouse/partner? _____
3. Building a successful relationship with your spouse/partner? _____
4. Raising your children? _____
5. Building and/or maintaining a close relationship with your parents? _____
6. Building and/or maintaining a close relationship with your siblings? _____
7. Developing close friendships? _____
8. Stewarding your financial resources? _____
9. Living up to your intellectual potential? _____
10. Nurturing your spiritual potential? _____
11. Dealing with your fears? _____
12. Finding wisdom? _____
13. Taking care of your physical health? _____
14. Taking care of your emotional health? _____
15. Being of service to others? _____
16. Being at one with yourself? _____
17. Accepting your limitations? _____
18. Coming to terms with aging and your own mortality? _____
19. Everyone at birth is "dealt a hand," so to speak. Rate the quality of the "hand" you were dealt. _____
20. Overall, rate yourself on how well you believe you have played the game of life, given the hand you were dealt.

Develop topics: Life assessment

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Life Assessment
Time required for this exercise	
Objective of the exercise	Develop topics for your alternate "deep dive" format
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

Description of the exercise

Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a "deep dive". Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.

Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.

In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.

When to use:

When a member says "I need some ideas on this ..."

How to facilitate:

- Allow 7-10 minutes
- Introduce the topic to the Forum
- Grab a flip chart and marker
- Start with one idea and run!

Outside sources:

To discuss things when you can't get the expert in the room, you can utilize outside sources such as books, magazine articles, TED Talks, etc.

Moderator actions:

- Same setup as topical discussion
- Arrange your agenda appropriately
- Prep the members
- Bring in any additional materials for the group

Example topics:

- Let's read and discuss the book *Double, Double* by Cameron Herold
- Everyone share two minutes on the best business book you have ever read
- Check out this great TED Talk that describes me perfectly

When to use:

When a member says, "I think this topic is interesting to the group, and we can all learn from it."

How to facilitate:

- Send out books, articles, TED Talks, etc. ahead of time, if possible
- Allow 15-20 minutes in the agenda
- Do you have enough time to watch a full TED Talk in this amount of time, or must it be done in advance?

Subject matter expert: (internal or external)

We could use some information on a topic that is in the wheelhouse of one of our Forum mates (internal), or an expert you bring in (external).

Moderator actions:

- Arrange your agenda appropriately
- Prep the members
- Bring in any additional materials for the group

Life assessment - Step-by-step

Step-by-step instructions

LIFE ASSESSMENT

The Life Assessment Survey (following page) is designed to gather your perceptions of your life experience so far. It asks you to rate a number of significant variables that are linked to your overall level of life satisfaction and happiness.

On each item, using a 1 – 10 scale (1 being low and 10 being high), rate how you see it right now. Perhaps 10 years ago you would have responded differently or maybe you will see it differently at some future time. Be as honest as you can be. You are doing this for you and no one else, including your Forum members. If you rate an item a "10," you won't have to defend it, nor will you have to defend an item rated a "1." No one will be allowed to try to talk you out of a number. Each of you will be asked to share your responses.

One last thing: some of you may be extremely analytical and may find it hard to come up with a justification for putting down one number. Just go with your gut feeling. No scientific explanation or back-up information is required.

Instructions for Moderator

Create a flip chart as shown below and transfer members' survey responses to the grid. Ask members to choose up to three areas they rated low as areas to focus on in the next 6-12 months. Members may want to reach out to other members who scored highly in those areas for assistance and support. Commit to a specific time to revisit the survey to discuss and chart improvements.

LIFE ASSESSMENT SURVEY GRID

1. Finding meaningful and fulfilling work?
2. Finding a suitable spouse/partner?
3. Building a successful relationship with your spouse/partner?
4. Raising your children?
5. Building and/or maintaining a close relationship with your parents?
6. Building and/or maintaining a close relationship with your siblings?
7. Developing close friendships?
8. Stewarding your financial resources?
9. Living up to your intellectual potential?
10. Nurturing your spiritual potential?
11. Dealing with your fears?
12. Finding wisdom?
13. Taking care of your physical health?
14. Taking care of your emotional health?
15. Being of service to others?
16. Being at one with yourself?
17. Accepting your limitations?
18. Coming to terms with aging and your own mortality?
19. Everyone at birth is "dealt a hand," so to speak. Rate the quality of the "hand" you were dealt.
20. Overall, rate yourself on how well you believe you have played the game of life, given the hand you were dealt.

Develop topics: Life's walk

EO chapter	South Florida
Shared by	Cesar Quintero
Name of exercise	Develop topics (from MTP programme)
Type of exercise (icebreaker, team-building, closing, etc)	Life's Walk
Time required for this exercise	
Objective of the exercise	Develop topics for your alternate deep dive format
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

Description of the exercise

Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a deep dive. Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.

Topics are sometimes a part of regular meetings or often used in a retreat setting, where more time is available.

In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.

"As a reminder, you will have __ minutes to do your walk no matter how many years you complete. We will ring a bell at the 5-minute mark, the 7-minute mark and at __ minutes. After the third bell, you will have a chance to finish off your current experience ... then you're done. We then ask you to stand in the centre to get feedback from the rest of us who have witnessed your walk. Our comments to you will be something like:

- I see a boy who is sad when his parents divorced at 8.
- I see an adolescent as a model student and a juvenile delinquent.
- I see a young man who cleaned up his act because of a girl and eventually married her.

"An important part of this feedback is that we reflect back what we have seen from the Life Walk, and not project our own stuff on the walker. For example, saying, "I see a man who is going to get through his current crises and have a very fulfilling life" is a projection ... we don't know this. Simply reflect back what we've seen. One of the greatest needs of a human being is to be seen by others for who they are and where they have been, without judgment or projection. That's what we are doing here.

"During the walk, everyone is silent except for the walker. The only exception is that I, the facilitator, may occasionally word coach the participant. Oftentimes, when reliving an emotional event, perhaps the death of a loved one, the Life Walker may revert to the past tense, saying things like, 'I remember ' versus 'I am.' My job is to gently remind the person to stay in the present tense ... reliving the moment.

"That's enough background ... any questions?"

"OK, take a few minutes and prepare your thoughts, remembering that file folders you may not consider now might open when you begin your walk."

Develop topics: Life's walk

"There is no particular order to the Life Walk ... whenever you're ready, step up behind the birth year, compose your thoughts, and begin your walk. We will begin timing when you begin speaking. Also, if you should encounter a particularly emotional time during your walk, it is perfectly all right to just stand at that time and relive the moment. Our commitment as a group is to honour you as you relive key moments in your life.

"OK, the walk is open."

Step-by-step instructions

LIFE'S WALK

In a Life Walk a small-group member is asked, literally, to walk his or her life, sharing experiences at different ages — past, present and future. Ideally, the chairs in the meeting area are arranged in a circle, with rectangles of cardboard, vinyl or wood laid out on the floor. The numbers on the rectangular steps represent ages in a person's life, from birth to age 80, with another (optional) step representing life after death.

The walker stands on each panel and speaks, in the present tense, about what is happening at that stage in his or her life. During the walk, an example statement from childhood might be, "I am 7 years old, and Mom just came into my room to say that she and Dad are getting a divorce. I am feeling ..."

The walker prepares for his or her walk by thinking about the key periods and transitional events in his or her life. Five minutes is sufficient preparation. Notes are not used during the walk. The events that are meant to be spoken will surface at the appropriate age — the participant will know what to say.

How to introduce the Life Walk to your small group

"The Life Walk is a timed exercise that gives you the opportunity to share important events or transitional times from birth up to [specify an ending time]. A series of tiles are laid out on the floor representing ages of your life. Since the tiles are only shown in five-year increments, you stand somewhere between them to represent ages that are not shown.

"Each of you will be given ___ minutes (eg, 8) to walk your life from birth to ____. There is no "right way" to do this. Nor is it required that you finish. Some people will only relive events for the first 15-20 years of their life in the ___-minute period. Others finish a ___-year Life Walk in less than five minutes.

"We'll give each of you a few minutes to sit quietly, listen to the music and perhaps compose your thoughts of what you might say. However, you won't use any notes during your walk. From our experience, as you stand on the different tiles, 'file folders' in your mind will open up on key events ... which you will then relive during the walk.

"As you walk your life, we ask you to describe events or relationships in the first person, present tense. For example, (this is where the facilitator needs to stand up on the tiles and demonstrate):

- I am 8 years old. Mom and Dad ask me to come and see them in the living room. They are telling me that they are getting divorced and I will be living half-time with Dad and half-time with Mom. I am scared and confused and I don't know what to make of this.
- I am 15 years old and president of the student body. I am living a double life; during the day I am a "model student." But at night I am a juvenile delinquent hanging out with kids from the south side of town. We make Molotov cocktails and throw them at cars. Somehow I am lucky; all of my friends get caught, but I always manage to sneak away.
- I am 23 years old and on a blind date that my roommate set up. My date is the most beautiful girl I have ever seen. We date for four months, then she breaks it off and I am devastated. I don't know what to make of it until my friend tells me she is turned off by my use of drugs. I go cold turkey off marijuana and seek her out for a second chance. We are married five months later.

Develop topics: Design a topic

EO chapter	South Florida
Shared by	Cesar Quintero
Name of exercise	Develop topics (from MTP programme)
Type of exercise (icebreaker, team-building, closing, etc)	Deep dive
Time required for this exercise	
Objective of the exercise	Develop topics for your alternate deep dive format
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	

Description of the exercise

Forum topics and exercises are areas of shared interest or issues common to a majority of the members. Topics apply to multiple members in the Forum; an issue is specific to a member and is the basis for a deep dive. Unlike a specific issue that one member needs to explore, multiple members have "skin" in topics. Sometimes they emerge during the group's 5% Reflections. As the 5% Reflections continue, a pattern develops, revealing that several members are referring to the same thing with only slight variations among them.

Topics are sometimes a part of regular meetings or are often used in a retreat setting, where more time is available.

In either situation, they are an important part of Forum and very often are the basis for advancing the Forum to a high level of self-disclosure and growth for all members.

Develop topics:

Design a topic worksheet

Step-by-step instructions

ACTIVITY: DESIGN A TOPIC

- **Breakout:** This exercise involves three groups of four members seated around a flip chart.
- **Objective:** Practice designing a Forum topic.
- **Total Time:** 30 minutes.
- **Task (20 minutes):** Select a Moderator, timekeeper and scribe.
- Design a topic, using the form below to assist you.
- Be prepared to present your topic design to the total group.
- Feedback (9 minutes): Each group has 3 minutes to present to the total group.
- Develop topics/exercises - The 10 competencies of Forum moderating.

DESIGN A TOPIC WORKSHEET

1. Identify a stimulating Forum topic for group discussion.

2. Create a dynamic communication starter to set the tone and the mood.

3. Develop a series of discussion questions to stimulate the group and to guide and focus the discussion.

4. Determine how you plan to summarize and close the discussion.

5. Assign time guidelines for each section. Plan on 60 minutes.

Develop topics: Topical discussion

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Deep dives
Time required for this exercise	
Objective of the exercise	Develop topics for your alternate "deep dive" format
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p>Description of the exercise</p> <p>5% Deep dives work best for topics that are meaningful and unresolved. They tend to deal with questions of "why." Below are a few other ideas with moderator actions on how to create some other discussions in Forum for deep dives of "how," "what," and "when."</p> <p><i>Continued on next page ...</i></p>	

Develop topics: Topical discussion - *continued*

Step-by-step instructions

TOPICAL DISCUSSION

Great topical discussions come in two forms: scheduled and impromptu. They both are facilitated the same way; it's a matter of whether the group knows the topic ahead of time so we might gather additional resources to share with the group in advance, or it just comes out of a "deep dive" or from a subject matter expert. In this tool, we put the topic in the "centre of the table" we openly discuss and idea-generate toward the topic (not a person). Some Forums call this a roundtable discussion.

Moderator actions:

- Assign someone to introduce the topic.
- Set a timer for 20 minutes.
- Make sure that everyone has a chance to be heard.
- Assure that the conversation stays on topic and we don't fall in to any rabbit holes.
- Stop when the conversation ends.

Example topics:

- Health care and the effect on my business.
- Budget vs. actual and how to guess correctly.
- The best business book.
- Employee handbooks.

When to use:

When a member says "How do I do this ... " or "I wish I had more information on..."

How to facilitate:

- Allow 20-30 minutes in the agenda.
- Introduce the topic to the Forum.
- Let the conversation roll.

Brainstorm:

- Idea generation with a smart group of people can be very valuable for a Forum. The main rule of brainstorming is that there are no bad ideas.

Moderator actions:

- All but the asking member participate.
- There are no bad ideas, no one gets to say "I already tried that."
- The goal is to fill as many flip chart papers or white boards as possible.
- One member writes as fast as they possibly can.
- Don't raise your hand, just pile on ideas!

Example topics:

- Best place to advertise.
- Ways to motivate my sales staff.

15. Content deep dive agendas

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Deep dives
Time required for this exercise	
Objective of the exercise	
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p>Description of the exercise</p> <p>Deep dives work best for topics that are meaningful and unresolved. They tend to deal with questions of "Why". Below are a few other ideas with moderator actions on how to create some other discussions in Forum for deep dives of "how," "what," and "when."</p>	
<p>Step-by-step instructions</p> <p>Topical discussion</p> <p>Great topical discussions come in two forms: scheduled and impromptu. They both are facilitated the same way, it's a matter of whether the group knows the topic ahead of time so we might gather additional resources to share with the group in advance or it just comes out of a deep dive or subject matter expert. In this tool, we put the topic in the "centre of the table" and we can openly discuss and idea-generate towards the topic (not a person). Some Forums call this a roundtable discussion.</p> <p>Moderator actions:</p> <ul style="list-style-type: none"> • Assign someone to introduce the topic. • Set a timer for 20 minutes. • Make sure that everyone has a chance to be heard. • Assure that the conversation stays on topic and we don't fall in to any rabbit holes. • Stop when the conversation ends. <p>Example topics:</p> <ul style="list-style-type: none"> • Health care and the effect on my business. • Budget vs. actual and how to guess correctly. • The best business book I ever read. • Employee handbooks. <p>When to use:</p> <ul style="list-style-type: none"> • When a member says "How do I do this ... " or "I wish I had more information on ... " <p>How to facilitate:</p> <ul style="list-style-type: none"> • Allow 20-30 minutes in the agenda. • Introduce the topic to the Forum. • Let the conversation roll. <p>Brainstorm:</p> <p>Idea generation with a smart group of people can be very valuable for a Forum. The main rule of brainstorming is that there are no bad ideas.</p>	

Content deep dive agendas

Moderator actions:

- All but the asking member participate
- There are no bad ideas, no one gets to say "I already tried that."
- The goal is to fill as many flip chart papers or white boards as possible
- One member writes as fast as they possibly can
- Don't raise your hand, just pile on ideas!

Example topics:

- Best place to advertise
- Ways to motivate my sales staff

When to use:

- When a member says "I need some ideas on this ..."

How to facilitate:

- Allow 7-10 minutes
- Introduce the topic to the Forum
- Grab a flip chart and marker
- Start with one idea and run!

Outside sources:

- To discuss things when you can't get the expert in the room, you can utilize outside sources such as books, magazine articles, TED Talks, etc.

Moderator actions:

- Same setup as topical discussion
- Arrange your agenda appropriately
- Prep the members
- Bring in any additional materials for the group

Example topics:

- Let's read and discuss the book *Double, Double* by Cameron Herold
- Everyone bring two minutes on the best business book you have ever read
- Check out this great TED Talk that describes me perfectly

When to use:

- When a member says "I think this topic is interesting to the group and we can all learn from it."

How to facilitate:

- Send out books, articles, TED Talks, etc. ahead of time if possible
- Allow 15-20 minutes in the agenda
- Do you have enough time to watch a full TED Talk in this amount of time or must it be done in advance?

Subject matter expert (internal or external)

We could use some information on a topic that is in the wheelhouse of one of our Forum mates (Internal) or an expert you bring in (external).

Moderator actions:

- Arrange your agenda appropriately
- Prep the members
- Bring in any additional materials for the group

Example topics:

- A Forum finds that most of the members are without a will or living trust
- Three Forum members have expressed an interest in an acquisition strategy for their companies
- A Forum member is an expert in social media and shares the best practices with Forum

When to use:

When a member says "I wish I had more knowledge about this and no one has had direct experience in this situation."

How to facilitate:

- Allow 30 minutes
- SME gets 5-10 minutes to talk about the topic
- Allow 10 minutes for Q&A
- Allow about 5 minutes for the Forum to debrief with a topical discussion

16. Strategies for generating great deep dives

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Deep dives
Time required for this exercise	
Objective of the exercise	To create a vision for the Forum moving forward.
Outcome of the exercise	Getting to know each Forum member better in order to create a vision for the Forum.
Tools needed	Whiteboard/flip chart, markers, "Creating your Forum vision" worksheet, timer
Handouts and pre-work if any	"Creating your Forum vision" worksheet

16. Strategies for generating great deep dives

Step-by-step instructions

1. Level 1 deep dives: It all starts with 5% Reflections:
 - a. 5% relevant sharing
 - b. Capture process
 - c. End with: What current problem or opportunity would be of most value to present today?
 - d. Rating process (Covey Quadrant: Urgent vs. Important, or 1 to 10)
2. Parking lot
 - a. Assign a parking lot czar
 - b. Keeps track by Matrix or Covey Quadrant
 - c. Have deep dives scheduled at least three months in advance
3. Level 2 deep dives: Three year goals as planned deep dives
Take a moment to identify where you want to be in three years, and come up with at least three goals that you need to achieve to get there. Keep in mind your why/purpose.

Painted vision October 2019: _____

Business goals, personal goals, time frame

From the list of goals, which ones would you most like to present to your Forum to solicit their assistance in helping you achieve them? Why?

4. Level 3 deep dives: Self curiosity/realization - Group shared value/depth
 - a. Challenge yourself to find current situations in your life that have real significance for you and that which take you out of your comfort zone. Something you are not willing to share with yourself and avoid any time it comes up.
 - b. It requires courage to share with the group the topics that are closest to you. These are areas where the Forum has the potential to be of most value to you, and for you to serve the Forum at the highest level by sharing most openly about yourself.
 - c. You could start with any challenging issues that keep you up at night.
 - d. Or, if you want, you could share exciting and overwhelming opportunities that you can't share in public.

List at least one:

1. _____
2. _____
3. _____

Ask yourself for each question:

- a. Where do you feel more uncertain, confused or afraid?
- b. How might your own actions be contributing to the challenge you face?
- c. What would failing in this issue mean for you and those around you?
- d. What is your biggest personal challenge in facing this situation? What feelings do you have about the situation?
- e. What is the outcome you hope for? What is your level of confidence right now that you can achieve this outcome (on a scale of 0-100)?

17. 13 Forum guidelines

EO chapter	South Florida
Shared by	Cesar Quintero
Type of exercise (icebreaker, team-building, closing, etc)	Forum Starter
Time required for this exercise	5 minutes
Objective of the exercise	To align all members at the beginning of Forum to commit to following these guidelines
Outcome of the exercise	
Tools needed	
Handouts and pre-work if any	
<p>Description of the exercise</p> <p>Read the guidelines out loud and have people commit to them for the retreat or Forum meeting. Alternate version: Have people comment on each with examples on how they have lived these commitments or a shout-out to another member who has lived these.</p>	
<p>Step-by-step instructions</p> <ul style="list-style-type: none"> • I will respect confidentiality • I will be present in the moment • I will stay around when times get tough • I will be on time and stay until the end • I will speak my truth • I will ask for what I want • I will take care of myself • I will listen with curiosity and openness • I will own my judgments • I will own my feelings • I will not blame, shame, fix others • I will ask permission before offering feedback • I forgive myself and others for mistakes 	