

Roundtable Leader Training

Workbook



FORUM RESOURCES NETWORK

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Introductions

Name	Business	Family	Roundtable

Expectations

Name	Top Two Challenges in Your Roundtable Today
	1. 2.
	1. 2.
	1. 2.
	1. 2.
	1. 2.
	1. 2.
	1. 2.
	1. 2.
	1. 2.
	1. 2.
	1. 2.

What is a Roundtable for You?

- 1. What are your Roundtable's values?**
- 2. What is your vision for your Roundtable?**
- 3. How do you feel your vision aligns with that of the other members in your group?**

Confidentiality: The Backbone of Roundtables

Supporting Rules of Confidentiality

- ✓ No pillow talk.
- ✓ No dissension.
- ✓ Walls have ears.
- ✓ Emails & faxes may not be safe.
- ✓ Members who are served a summons or subpoena by a court are obligated by law to tell the truth.

Two Types of Roundtable Confidentiality

- 1 Standard Confidentiality:** No conversations with anyone outside the Roundtable. No conversations with any member of the Roundtable **unless the presenter is present.**
- 2 High Confidentiality:** High confidentiality is available at the request of the presenter for extra sensitive issues. Members cannot discuss the issue ever again unless it is brought up by the presenter.

What are the Remedies for a Breach of Confidentiality?

- ✓ A member who breaches confidentiality is asked to resign from the Roundtable.
- ✓ If the members choose unanimously, they may elect to keep the member if the breach was considered accidental and if they can continue to trust the member.

Roundtable Confidentiality Contract

I understand that in order to achieve the level of trust necessary to insure the interchange we all seek in our Roundtable, all information shared by the membership of this Roundtable must be held in absolute confidence.

I understand no Roundtable business can be discussed with anyone who is not a member of my Roundtable.

I understand that any discussion of any Roundtable business outside the meeting by two or more Roundtable members can only be held in person in a setting of absolute privacy, and the presenter must be present. A Roundtable Member may also request "High Confidentiality," which is reserved for extra-sensitive issues. Members cannot discuss the issue ever again unless it is brought up by the presenter.

Most importantly, I understand that I have a major moral and ethical responsibility to my Roundtable members who have entrusted me with their most personal feelings, problems and issues. To break this trust is to destroy all that Roundtable can and should mean to its members.

We have read the above contract and by signing below agree to abide by the agreement.

Roundtable Member	Date
Roundtable Member	Date
Roundtable Member	Date
Roundtable Member	Date
Roundtable Member	Date
Roundtable Member	Date
Roundtable Member	Date
Roundtable Member	Date
Roundtable Member	Date
Roundtable Member	Date

Confidentiality Case Studies

Case #1 -- You Mean I Can't Even Tell My Wife?

At the second meeting of your new Roundtable, John says "I'm so glad I can trust everyone in this Roundtable to keep everything confidential. What I shared with you about my situation is something that has been bothering me for a long time and I had no one to talk to about it but you." At this point Sam says, "Well, I can tell you that I haven't told a soul about your presentation but it wasn't easy. My wife asked but I simply told her it's confidential." Without hesitation George, a new member of the Roundtable, says "What do you mean? I tell my wife everything. She's my best friend and confidant and we have no secrets from each other."

What went wrong?

What would you do?

~~~~~

### Case #2 -- But No One Said a Word!

One day Jane goes to her office and learns that her business partner found out about her plans to oust him from the business, something that Jane had only shared in the Roundtable. Jane is furious and calls an emergency Roundtable meeting to find out who has breached confidentiality. Everyone is at the meeting and everyone is very concerned for Joe. Each member also insists that he or she has not breached Jane's plans to anyone. Jane was in complete disbelief and lost all faith in her Roundtable. Everyone was completely soured by the experience, yet no one knew what to do. A week later Jane's partner said, "My wife overheard everything when she was at lunch at Clyde's last week." Jane remembered that some of her Roundtable members had gone to lunch at Clyde's around the same time as Jane's presentation.

***What went wrong?***

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*How would you handle this?*

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Case #3 -- That Wasn't in the meeting!



Jorge and Luis are in a roundtable together. Outside of a roundtable meeting, Luis calls Jorge to ask his opinion on a gift for his girlfriend, Susanna. Later that week Jorge attends a cocktail party where he runs into Luis and his friend Tony. In front of Tony, Jorge asks Luis if his girlfriend liked the necklace Luis bought her. Luis is shocked, and the situation is very uncomfortable for everyone. At the Roundtable meeting the next day, Luis is very upset that Jorge has breached confidentiality.

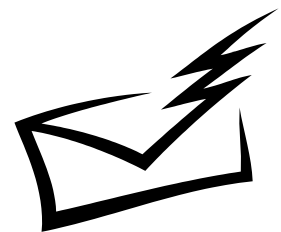
What went wrong?

How would you handle this?

~~~~~

**Case #4 -- Technology Bytes**

Linda has been dealing with a difficult family issue, which she has brought up at her Roundtable meeting. She often sent emails to the other Roundtable members asking for support and suggestions. At a Roundtable meeting, she thanks the members for all their support and responsiveness. She adds a special thanks to Jim, who has been particularly helpful. Upon hearing this, Jim looks very agitated and says, "I've not responded to any of the emails. That email address is our home account and our whole family shares it."



*What went wrong?*

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***How would you handle this?***

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### **Case #5 -- If They Don't Know Who or What...**

Joanne goes home after a Roundtable meeting and she is very disturbed by Susan's presentation. She tells her husband about the presentation, but she does not tell him that it was Susan who had presented. That same night, Barbara's husband asks her what happened at the Roundtable meeting. Barbara cautiously says, "I can't tell you that, but I'll just tell you that Susan presented a serious issue." At the next Chapter meeting you overhear Joanne and Barbara's husbands talking, and realize that they have figured out exactly what was presented and by whom at the last Roundtable meeting.

***What went wrong?***

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***How would you handle this?***

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## Gestalt Language Protocol – The Heartbeat of Roundtables

### The Fundamental Principle of Gestalt: Share Your Experience

- ☐ *I will speak from my own experience rather than give advice.* This allows the presenter to accept the message and provides an opportunity for all members to learn from any presentation. This can include sharing my experience in the moment, such as sharing my emotions (sad, mad, glad, ashamed or afraid).
- ☐ *I will speak in specifics telling my exact stories rather than generalizing.*
- ☐ *I will avoid using the words “you,” “you should,” “I would,” and “one.” Instead I will focus on saying “I” when sharing my experiences.*
- ☐ *I will apply reflective listening to ensure that I heard what I thought I heard.*

### Do You Need Q&A?

The primary purpose of asking questions after a presentation is to determine which specific experience to share. Good coaching and thorough presenting minimize the need for these questions.

### Gestalt Theory: Asking Questions

- ✓ Generally speaking, questions help the problem-solving process but are less useful in helping the experience-sharing process.
- ✓ Questions increase the demand on the presenter, thereby increasing the risk of defensiveness.
- ✓ When defensiveness occurs in the presenter, his capacity to listen drops as he puts emotional energy into defending himself.



## Gestalt Language Protocol – The Heartbeat of Roundtables

### Clarifying Questions: A Problem-Solving Approach

Clarifying questions give the group more information about the presenter's situation but do not benefit the presenter.

Clarifying questions are usually prompted by a problem-solving approach. When a group asks several clarifying questions during the Q & A period, several negative things can happen:

- ❶ The group's problem-solving engine gets engaged, distracting the members from the harder work of identifying and sharing relevant, significant experiences.
- ❷ The presenter is significantly outnumbered by the group and can be left feeling overwhelmed and defensive, rather than unburdened, relieved and supported.
- ❸ Clarifying questions serve the group – not the presenter. They decrease the time the group has to offer value to the presenter through sharing their own experiences.
- ❹ Clarifying questions are often embedded with advice or judgment. These can contribute to the presenter feeling defensive.

### Thought-Provoking Questions: An Experience-Sharing Approach

Thought-provoking questions have the potential to help the presenter see his/her situation from a different angle not previously considered.

Thought-provoking questions prompt the presenter to think on a deeper level about their dilemma.

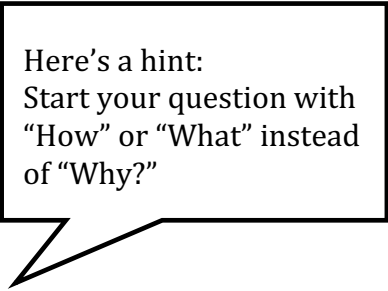


Resist the urge to “fix” the presenter's dilemma! If you have a solution, ask yourself: *“What personal experience made me think of that?”*

## Gestalt Language Protocol – The Heartbeat of Roundtables

### Best Practices Regarding Questions

- ☐ Always have a well-coached presenter. This minimizes the need for clarifying questions.
- ☐ Disengage from a problem-solving mental process. This will decrease your need to ask clarifying questions.
- ☐ Do not pose questions in an attacking manner.
- ☐ If the group has difficulty asking thought-provoking questions, limit or eliminate the Q & A following the presentation.



Here's a hint:  
Start your question with  
"How" or "What" instead  
of "Why?"

### Gestalt Theory: The Presentation as “Experience Sharing”

- ✓ Presentations provide an opportunity for members to learn about one another and grow as a Roundtable.
- ✓ Every experience shared is a case study providing all members with an opportunity to learn from each other.
- ✓ When a member responds to a presentation with advice or opinion, the result can be destructive to the presenter and to the overall safety of the Roundtable.
- ✓ Advice or opinion is often judgmental and assumes that the person giving the advice is correct and that the presenter is wrong.
- ✓ Advice or opinion assumes that the members have the answer. Experience assumes that the presenter has his own answer.

## Gestalt Language Protocol Case Study

**Instructions:** Read the following case study of a member presentation. On the next page, determine which of the questions during Q&A and experience sharing follow the Gestalt Language Protocol and which do not.

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**Topic:** Family

**Purpose:** Experience with how to re-establish a damaged relationship with my son?

**Presentation:**

*I. Background*

My relationship with my son was nonexistent when he was a child. I was working and traveling all the time so that I can provide for the family. I thought I was doing the best I can do to provide my kids with a good education and a financially secure future. As you guys know my schedule also led to a deterioration of my relationship with my wife which ultimately led to divorce. I believe that while my relationship with my son has never been very strong, the divorce has hurt my son to the point where he and I have not spoken in 6 months.

*II. Current Situations*

The current situation is that he has not returned any of my calls and he only communicates with me by email. Every time I ask to see him, he's too busy. In a couple of months he is moving across the country to go to college.

*III. Options*

I've considered just showing up at his door and forcing a conversation. I've considered just ignoring the situation until he decides he wants his dad in his life. I've even considered not paying for his college but that's clearly not the answer. I'm just not sure what to do.

*IV. Future Implications*

If I just show up, what will I do if he just tells me to go away? I'm really afraid that if I don't do something now, it maybe too late as finds his own life.

## Gestalt Language Protocol Case Study

### Q&A:

| Member Question                                                                 | Gestalt? |
|---------------------------------------------------------------------------------|----------|
| 1. How is your relationship with his mother?                                    |          |
| 2. How is his relationship with his mother?                                     |          |
| 3. When is the last time you spoke with your son in person and on the phone?    |          |
| 4. Has he ever specifically expressed his problem with you?                     |          |
| 5. Have you sought any counseling for yourself?                                 |          |
| 6. Have you considered family counseling?                                       |          |
| 7. How is his relationship with your girlfriend?                                |          |
| 8. Why did you wait six months before you decided to present this to us?        |          |
| 9. Don't you think you owe him an apology?                                      |          |
| 10. Does he have any idea how much you care and how much this is affecting you? |          |
| 11. What about taking him on a trip?                                            |          |
| 12. What common interests do the two of you have?                               |          |
| 13. What do you think he wants from you?                                        |          |

## Gestalt Language Protocol Case Study

### Experiences:

| Member Response                                                                                                                                                                                                                                                                                                                                                                                                                                       | Gestalt? |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| 1. I think you should go over there and give him a big hug and tell him that you love him.                                                                                                                                                                                                                                                                                                                                                            |          |
| 2. I would talk to the boy's mother and tell her "I'm cutting off all money" until she helps you; you never know what she's saying to him.                                                                                                                                                                                                                                                                                                            |          |
| 3. Kids are kids and teenagers are just irresponsible. I wouldn't worry about it.                                                                                                                                                                                                                                                                                                                                                                     |          |
| 4. My son and I didn't talk for about a year after my divorce. After lots of reading, I realized that he may feel responsible for the divorce and perhaps ashamed. So I set up a meeting with him and my ex-wife and told him that he had nothing to do with it, in-fact we may have been divorced sooner had we not been concerned for him. When he heard it from both of us he felt a great sense of relief and we started on our path to recovery. |          |
| 5. My dad and I didn't talk from the time I graduated college until I had my kids. Our relationship had been strained for a variety of reasons but what I think got us back on track was that I apologized for my part. I couldn't imagine my kids growing up without their grandfather so I swallowed my pride and I took responsibility and apologized to him. We're still working on it but at least we're making progress.                        |          |
| 6. Pass                                                                                                                                                                                                                                                                                                                                                                                                                                               |          |
| 7. Sorry, I have no experience to share on this one but please call me anytime. Thank you for sharing something so intimate with us.                                                                                                                                                                                                                                                                                                                  |          |
| 8. I'll tell you what to do after the meeting.                                                                                                                                                                                                                                                                                                                                                                                                        |          |



## The Roundtable Leader

- 1) **Lead by example.** If you take the lead in risking and sharing deep personal experiences, your Roundtable members will follow. Trust is contagious.

*"Leadership is practiced not so much in words as in attitude and in actions." – Harold S. Geneen*

- 2) **Share your concerns immediately.** If you don't say anything, you are agreeing with how things are going. Be sure you criticize the behavior, not the person.

*"One of the tests of leadership is the ability to recognize a problem before it becomes an emergency." – Arnold Glasgow*

- 3) **Address your concerns directly to the Roundtable member in question.**

### Levels of Roundtable Development

| Stage        | Description                                                                                           | Level of Depth                                                     | Nature   |
|--------------|-------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------|----------|
| Independence | "Stranger at the bus stop"<br>Presenter often has the answer.                                         | Surface, superficial,<br>not very vulnerable                       | Courtesy |
| Involvement  | "Discussed with trusted<br>people in our lives"<br>Presenter has some idea<br>but is very challenged. | Meaningful,<br>challenging, somewhat<br>vulnerable                 | Conflict |
| Intimacy     | "Interdependence" – highly<br>reliant upon group for<br>support.                                      | Very open, meaningful,<br>challenging, emotional<br>and vulnerable | Cohesion |

**What factors cause a Roundtable to change levels?**



## Roundtable Member Survey

Please complete this survey by yourself. In order for this survey to be effective, respond to each question honestly.

**Your Name** (optional): \_\_\_\_\_ **Today's Date:** \_\_\_\_\_  
 Have you had Roundtable member training? \_\_\_\_\_ Leader training? \_\_\_\_\_

### **Part I.**

On a scale of 1-10, 10 being best, please rate each of the following items:

- \_\_\_\_\_ Member promptness to meetings and retreats
- \_\_\_\_\_ Member attendance
- \_\_\_\_\_ Meeting and retreat scheduling
- \_\_\_\_\_ Group policies on tardiness and attendance
- \_\_\_\_\_ Group enforcement of these policies
- \_\_\_\_\_ Roundtable retreats
- \_\_\_\_\_ Roundtable constitution
- \_\_\_\_\_ Roundtable mission
- \_\_\_\_\_ Meeting structure
- \_\_\_\_\_ Satisfaction with monthly member updates
- \_\_\_\_\_ Presentation preparation & coaching
- \_\_\_\_\_ Presentation structure & process
- \_\_\_\_\_ Quantity of presentations
- \_\_\_\_\_ Mix of personal & business presentations
- \_\_\_\_\_ Presentation depth, significance/ member openness
- \_\_\_\_\_ Group adherence to Gestalt Language Protocol
- \_\_\_\_\_ Feeling of safety from being judged
- \_\_\_\_\_ Process for adding new members
- \_\_\_\_\_ Confidentiality
- \_\_\_\_\_ Leader effectiveness
- \_\_\_\_\_ Ability to have healthy conflict
- \_\_\_\_\_ Is the Roundtable meeting my needs?

### **Part II.**

1. What would you like to accomplish during the retreat?
  
  
  
  
  
  
  
  
  
  
2. Do you know of any unspoken/ unaddressed conflicts?
  
  
  
  
  
  
  
  
  
  
3. Are there any conflicts of interest such as business dealings among Roundtable members?
  
  
  
  
  
  
  
  
  
  
4. What changes could be made to improve your Roundtable experience?

## Roundtable Roles, Responsibilities & Activities

| <b>Roles, Responsibilities &amp; Activities</b>                                                                                                                                     | <b>Who Serves This Function?</b> | <b>Term</b> | <b>Selection Process</b> |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|-------------|--------------------------|
| Prepare and bring meeting agenda; ask for volunteers for other roles; lead group through scheduling process and parking lot process; lead by example; interface with VA CEOs Admin. |                                  |             |                          |
| Keep notes of absence, tardiness, group roster and constitution. Handle meeting logistics and keep minutes of housekeeping section of the meeting                                   |                                  |             |                          |
| Prepare by meeting with a coach in advance and preparing presentation worksheet                                                                                                     |                                  |             |                          |
| Meet with presenter before meeting; lead group through communication starter during presentation                                                                                    |                                  |             |                          |
| Give warnings as time elapses and notices when time is up                                                                                                                           |                                  |             |                          |
| Give notice and assistance when the Gestalt Language Protocol is violated.                                                                                                          |                                  |             |                          |
| Take notes of the experiences shared during the presentation and provide them to the presenter.                                                                                     |                                  |             |                          |
| Host monthly meetings and organize logistics                                                                                                                                        |                                  |             |                          |
| Other roles that are not described here.....                                                                                                                                        |                                  |             |                          |
| Other roles that are not described here.....                                                                                                                                        |                                  |             |                          |
| Follow group's constitution and comply with rules particularly confidentiality, Gestalt Protocol, attendance, and commitment. Each member is to present, at least, once per year.   |                                  |             |                          |

**What action(s), as a Leader, will I take this year to effect change?**

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## Active Listening

“Are you really listening, or are you just waiting for your turn to talk?” – Robert Montgomery

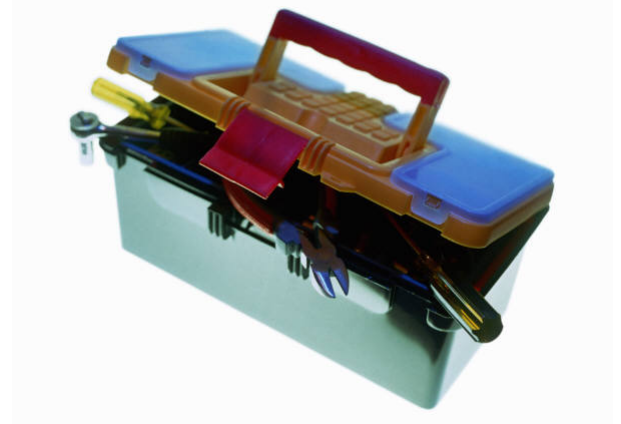
### Active Listening is:

- Listening beyond the words to hear the feelings.
- Repeating what you thought you heard to ensure you heard it correctly.
- Paying attention to body language, facial expressions and tone.

“Listening is a magnetic and strange thing, a creative force. The friends who listen to us are the ones we move toward. When we are listened to, it creates us, makes us unfold and expand.”  
- Karl A. Menninger

### Active Listening Tools

- Silence
  - 10 minutes to prepare updates
  - 3 minutes during presentation, before sharing experiences
- Taking Notes



### *What listening habits does your Roundtable exhibit?*

- 1.
- 2.
- 3.
- 4.
- 5.

## Meeting Management

Effective Roundtable meetings are well-managed as follows. Rate your Roundtable on each item on a scale of 1 to 5 (1 being worst, 5 being best):

|                              |                                                                                                                                                 |  |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|--|
| <b>Preparation</b>           | Presenter(s) & Coach(es) are selected and prepared prior to each meeting unless there's an emergency presentation.                              |  |
| <b>Commitment</b>            | Members are present; arrive on time, present at least once per year.                                                                            |  |
| <b>Location</b>              | Provides a comfortable, quiet uninterrupted setting.                                                                                            |  |
| <b>Agenda</b>                | Is provided by the Roundtable Leader at the beginning of each meeting. Each meeting is comprised of updates, presentation(s), and housekeeping. |  |
| <b>Roles Assigned</b>        | Timer, Scribe, and Process Observer are in place and do their jobs.                                                                             |  |
| <b>Facilitation</b>          | Leader ensures all members participate and no one dominates.                                                                                    |  |
| <b>Member Responsibility</b> | Members listen actively, turn off PDAs, return from breaks, etc.                                                                                |  |
| <b>Follow-up</b>             | Members do what they promise to the Roundtable.                                                                                                 |  |
| <b>Policy Enforcement</b>    | Late members pay the set fine without protest; missed meetings are tracked; consequences are uniformly applied.                                 |  |
| <b>Do we need more?</b>      |                                                                                                                                                 |  |
|                              |                                                                                                                                                 |  |

## Meeting Agenda (4 Hours)

**0:00**

### **Confidentiality & Gestalt reminders**

Inclusion exercise/check-in

Clearing the Air

Assign roles (Timer, Process Observer)

Prepare Updates

Share Updates – (5 min each)

Build Parking Lot

Review agenda to consider emergency presentations

Break

**1:20**

### **Review presentation format**

- Confidentiality reminder & level
- Communication starter (30 sec/person)
- Presenter purpose (1 min)
- Presenter presents (15 min max)
- Q&A (20 min max)
- Presenter to restate purpose
- Silence (3 min)
- Experience Sharing (3 min/person)
- Presenter's closing remarks (3 min)
- One word close

### **One or Two Presentations/Explorations\***

**3:45**

### **Housekeeping**

- Administrator to inform group of attendance and tardiness standings
- Scheduling
- Retreat Planning
- Street tips
- Confirm Presenter & Coach for next meeting
- Meeting review – Each person to respond to “What worked, and what didn’t about today’s meeting?” or “Does anyone have anything they want to say?” or a closure exercise.

**4:00**

### **Adjourn**

\* Some groups meet for 5 hours and have dinner after each meeting.

\*\* Many meetings only have one presentation. In the absence of a second presentation, you may substitute Roundtable exercises such as communication starter questions.

## Healing Conflict & Difficult Conversations

**Background:** M. Scott Peck's book A Different Drum describes the four stages of community building:

- I. **Pseudo Community** – we exchange pleasantries and pretend things are good but really they are not beneath the surface, there are little discomforts. Once we address those discomforts, we move to stage II.
- II. **Chaos** – at this stage people have real strong feelings towards one another and until they have expressed them by “telling their truth” or “emptying” we remain in Chaos. Only once we’ve expressed those feelings can we move to the next stage, “Real Community.”
- III. **Emptiness** – Shed biases, prejudices, need for power/control or self-superiority, which are only mechanisms for self-validation or ego protection.
- IV. **Real Community** – members of a community have complete empathy with one another.

### Step I – Clearing the Air

Step 1 is designed to be almost pre-emptive. It provides a process that allows regular communication and declaration of challenges amongst team members. Ideally these little concerns are addressed before they become big issues. While some people are very comfortable with “speaking their mind,” that is rarely true of all members of a team and its not always communicated in a way that is productive and safe.

It's important to have some grounding and safety mechanisms in place prior to embarking upon this process. To set the stage let's consider an example where John is upset that Sam is late to the meeting. Whose problem is it? It is possible and likely that it's Sam's problem and the team's problem, including John. But as far as John's concerned, it is his problem for the following reasons:

1. He is upset about the situation.
2. By not speaking up, he has to harbor his anger.
3. By not speaking up, Sam is not given the chance to know how his behavior affects John, nor does he have a chance to explain what happened or to even change his behavior in the future.
4. Too often people, in this case John, complain to third parties, which unfairly poisons their perception of Sam and builds a culture of indirect communication and mistrust.

#### **Process:**

- I. To clear the air in a group, one member starts by looking each person in the eyes and declaring:

- a. "I'm clean with you." Or
- b. "I'm not clean with you because...." I.e., "Sam I'm not clean with you because when you were late, I felt upset and unworthy."
- c. There is no response by the other parties at this time. Each member may respond when it is his/her turn or in the residue round after each person had a turn.

The idea is that if I look you in the eyes and make a declaration, I'm telling the truth. If Bob is not clean with someone and it's a simple matter, Bob can simply say the reason for not being clean. I.e. "Joe, I'm not clean with you. I owe you an apology for not returning your call." If it's a more complicated matter, we park it until has gone all around the table.

II. Once Bob is done; we go to the next member who does the same thing as above. The process continues until everyone has gone.

III. Residue Round - After all members have gone, do one last round to check if there is any residue. A member who went in the early rounds may not be clean about something stated in a later round. This last check insures everyone is clean.

## Step II – Resolving Bigger Issues

**Background:** Often big issues arise out of misunderstanding, miscommunication and/or commingling facts and emotions. This process allows for a way to navigate tough issues.

### Process:

- I. Ask person with whom you have a concern if or when maybe a good time to talk.
- II. When it is time to talk follow these steps:
  - a. Person (A) states his/her **facts, judgments, feelings, part** and **wants**. I.e. "**My facts** are you were late 10 minutes this morning and you were late 40 minutes to the meeting before. **My judgments** are that you don't respect our time. **My feelings** are mad and sad. **My part** is that I take it personally when someone is late. **I want** you to commit to our process, to apologize and to pay the fine."
  - b. Person (B) **repeats** above in order to be sure it's been heard accurately (regardless of whether or not person B agrees). Person (B) then asks, is there more? If so, the process continues with step a. above. Once person (A) is done, person (B) can address his/her issues in the same manner.

## Step III – Appreciation



Background: Often when we have a conflict with someone, we focus on and harbor the resentment and forget the positives. Appreciation allows us an opportunity to focus on the positives and express them.

Process:

- I. Each person to take 5 minutes to write an appreciation to each other person in the room.
- II. Hand out the appreciation notes.
- III. Each person to read aloud his/her appreciations.

## **Clearing the Air**

### **SENDER**

- I. Ask permission to clear the air.
- II. State your **facts** – be specific and brief
- III. State your **judgments** – these are the stories you make up
- IV. State **feelings** – Just emotion words like sad, mad, ashamed, excited ...
- V. State **part** – What is your contribution to the situation?
- VI. State **want** – What do you want from the receiver?

### **RECEIVER**

- I. Reflect or mirror what you heard without responding or explaining or defending – simply listen to understand.
- II. Ask if what you heard is correct.
- III. Ask if there's anything else.

Confirm that both parties are clean.

## Making the Most of Your Updates

### Updates provide Roundtables with:

- ✓ A mechanism to reconnect with members' lives
- ✓ A list of potential presentations

### My Roundtable's Updates Are (check all that apply):

- ☐ Prepared in advance using a common form such as the ones that follow or;
- ☐ Prepared in silence at the beginning of each meeting
- ☐ Timed and concise.
- ☐ Address the most significant issues and describe the related emotion that a member has experienced since the group last met
- ☐ About listening to the member speaking and not interrupting or engaging in dialogue
- ☐ Debriefed for one minute after each member gives an update for determining future presentations (parking lot)
- ☐ Led by the Leader to set an example in modeling openness and vulnerability
- ☐ NOT a travel journal



### Want to Shake Up Your Updates?

Have members pair off and share updates. Then have each person report on his/her partner's update.

## Update Form A

| (Choose <u>one</u><br>from each row<br>below)                                                                        | Best | Worst | Dread | Look Forward |
|----------------------------------------------------------------------------------------------------------------------|------|-------|-------|--------------|
| <b>Business</b><br>or<br><b>Finance</b><br>or<br><b>Purpose</b><br>or<br><b>Faith</b>                                |      |       |       |              |
| <b>Family</b><br>or<br><b>Relationship</b><br>(w/spouse,<br>kids, siblings,<br>or parents)<br>or<br><b>Love life</b> |      |       |       |              |
| <b>Personal Health</b><br>or<br><b>Mental Health</b><br>or<br><b>Physical Health</b>                                 |      |       |       |              |

## Value-Based Updates

Preparing value-based updates requires each member to determine his/her core values prior to completing this form as follows:

1. Each member lists all of his/her values on the reverse side of this sheet.  
(i.e.: love, honesty, family, faith, health, adventure, independence, growth, etc.)
2. Each member determines his/her top three values.
3. Plug the values into the value column below.

| Values          | Past 30 days |       | Future     |              |
|-----------------|--------------|-------|------------|--------------|
|                 | Best         | Worst | Dread Most | Look Forward |
| <b>Value #1</b> |              |       |            |              |
| <b>Value #2</b> |              |       |            |              |
| <b>Value #3</b> |              |       |            |              |

## Monthly Update (Feelings)

Use the following form to share what you've experienced in the last 30 days.  
Allow 5 minutes per person to share.

| Type of Experience                                                                                                                       | Event               | Importance<br>How is it important or relevant? | Impact<br>How does it impact me? | Feeling<br>What is the emotion that it evokes in me? |
|------------------------------------------------------------------------------------------------------------------------------------------|---------------------|------------------------------------------------|----------------------------------|------------------------------------------------------|
| Business                                                                                                                                 | High –<br><br>Low – |                                                |                                  |                                                      |
| Personal                                                                                                                                 | High –<br><br>Low – |                                                |                                  |                                                      |
| Family                                                                                                                                   | High –<br><br>Low – |                                                |                                  |                                                      |
| Future High<br><br>What's exciting on the horizon?<br>Goal/hope/<br>Dream you're pursuing?<br>(Business, personal, family or all three.) |                     |                                                |                                  |                                                      |

## The Parking Lot

| Name | Issue | Priority |
|------|-------|----------|
|      |       |          |
|      |       |          |
|      |       |          |
|      |       |          |
|      |       |          |
|      |       |          |
|      |       |          |
|      |       |          |
|      |       |          |
|      |       |          |
|      |       |          |
|      |       |          |
|      |       |          |
|      |       |          |

## The Parking Lot

*Effective leadership is putting first things first. – Stephen Covey*

**How do we determine which issues are the important ones?**

|                     |                    |
|---------------------|--------------------|
| <i>Quadrant I</i>   | <i>Quadrant II</i> |
| <i>Quadrant III</i> | <i>Quadrant IV</i> |



## Roundtable Meeting Assessment Form

### How to Use This Form:

1. At the end of the Roundtable meeting, the Leader collects the form and tabulates the results.
2. Before the next meeting, the Leader circulates the results of the last meeting. This can be sent with the agenda for the upcoming meeting.
3. If there are particular high or low ratings, these are discussed at the meeting.
4. Every six months, a more detailed review of the results may be put on the agenda.

|                                                         |                                                                                                                                       |   |   |   |   |   |   |   |   |   |    |
|---------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|---|---|---|---|---|---|---|---|---|----|
| Name:                                                   |                                                                                                                                       |   |   |   |   |   |   |   |   |   |    |
| Your rating, (Circle)                                   | <div style="display: flex; justify-content: space-between; padding: 0 10px;"> <span>Did not work</span> <span>Excellent</span> </div> |   |   |   |   |   |   |   |   |   |    |
| I. Preparedness – by Leader                             | 0                                                                                                                                     | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| II. Preparedness – by Members                           | 0                                                                                                                                     | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| III. Agenda & Presentations                             | 0                                                                                                                                     | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| IV. Following Roundtable Meeting Protocol and Processes | 0                                                                                                                                     | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| V. Participation & Sharing by Members                   | 0                                                                                                                                     | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| VI. Confidentiality Comfort Level                       | 0                                                                                                                                     | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| VII. Overall experience & Take Home Value               | 0                                                                                                                                     | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |

## **Explanation of Criteria**

### **i. Preparedness – by Leader**

- One on one offline with members, between meetings
- Agenda & info in advance with enough time notice
- Sensitivity of The Leader to pick up presentations from updates
- Leader's follow up of previous presentations, if required

### **ii. Preparedness – by Members**

- Knowledge of protocols & processes
- Preparing updates before arrival
- Attendance & timely arrival

### **iii. Agenda & Presentations**

- Quality of agenda content
- Quantity of Content
- Preparedness of presenter / resource
- Quality of presentations

### **iv. Following Roundtable Meeting Protocol and Processes**

- Using Gestalt Language Protocol
- Performance of:
  - Moderation/Leader
  - Process checker
  - Time keeper
  - Other responsibility holders
- Maintaining authority in the process

### **v. Participation & Sharing by Members**

- Did each share?
- Quality of presentation
- Were non-speaking members participating
- Participating & sharing by myself

### **vi. Confidentiality Comfort Level-** (How confident are you that what is said in the Roundtable will remain within the Roundtable?)

Could include:

- Reiteration of Confidentiality imperative in meetings
- Wayward comments or quips between members
- Casual discussions of the issues outside meeting
- Any major breach requiring Group attention

### **vii. Overall Experience & Take-Home Value**

## Crisis Management

|                        |                                                                                                                                                                                                                                                                                                                                                            |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>The Controller</b>  | John has to control every discussion, and always gets the first and the last word on any subject. <i>What do you do?</i>                                                                                                                                                                                                                                   |
| <b>Loose Ship</b>      | You are the Leader-Elect. The current Leader is unprepared, no agenda has been distributed in months and the meetings are becoming a waste of time. Complicating matters is that the Leader is going through a very horrible divorce and is very sensitive. <i>How do you deal with the situation?</i>                                                     |
| <b>No Crying</b>       | Two outspoken members have expressed their desire for your Roundtable to be a business group. Another member begins to cry during her update. You can clearly sense the tension in the room. <i>What do you do?</i>                                                                                                                                        |
| <b>Loose Lips?</b>     | A member storms into the meeting accusing another member of breaching confidentiality. The member being accused is not present. <i>What do you do?</i>                                                                                                                                                                                                     |
| <b>Poor Attendance</b> | The group has been reluctant to agree on any norms. Many members miss meetings and retreats and it's rare that everyone attends at the same time. Members have stated that it's okay since they're all very, very busy. <i>What do you do?</i>                                                                                                             |
| <b>Retreat Dilemma</b> | Your Roundtable retreat is coming up in two weeks and everyone has made their travel arrangements. All the activities have been painstakingly organized. You find out that one of the members has received a serious diagnosis and cannot travel. <i>What do you do?</i>                                                                                   |
| <b>Mental Illness</b>  | Several members of the group have gone to counseling over the years. One of those members, Ray, still seems very unstable. Ray's updates are focused on one issue and he's always very willing to present on that issue. Some members have begun to wonder if his problems are beyond the realm of The roundtable. <i>How do you handle the situation?</i> |
| <b>Indicted CEO</b>    | You are in a Roundtable with another CEO when the news breaks about his corporate wrongdoing. As the Leader, you want to support a member in need, but you don't want the group to be involved in the legal proceedings. <i>What do you do?</i>                                                                                                            |

## Presentation Coaching

### Coaching Worksheet

|                              |                                                                                                                                                         |
|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Topic</b>                 | Business, Personal, Family                                                                                                                              |
| <b>Purpose</b>               | I would like the group's experience with...                                                                                                             |
| <b>Boundaries</b>            | I don't want to get into....                                                                                                                            |
| <b>Obstacles</b>             | Things that get in the way are....                                                                                                                      |
| <b>Feelings</b>              | sad, mad, excited, ashamed, afraid                                                                                                                      |
| <b>Cause for feelings</b>    |                                                                                                                                                         |
| <b>Communication Starter</b> | Tell us about a time that you were ( <u>insert feeling from above</u> ) ( <u>take the cause for the feeling and make up the rest of the question</u> )? |

### Glossary of Terms

|                              |                                                                                                                                                                                                                                                |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Topic</b>                 | Business, Personal, Family (Identify all that apply)                                                                                                                                                                                           |
| <b>Purpose</b>               | This is the central question that the presenter will present. The process works best when it's focused on only one issue.                                                                                                                      |
| <b>Boundaries</b>            | Areas that the presenter does not want to discuss either because the presenter has already decided against them or because they can easily take the group on a tangent.                                                                        |
| <b>Obstacles</b>             | These are things that are outside of the Presenter's control that prevent him/her from achieving the purpose.                                                                                                                                  |
| <b>Feelings</b>              | These are the emotions that this issue evokes for the presenter.                                                                                                                                                                               |
| <b>Cause for feelings</b>    | What creates these feelings for the presenter?                                                                                                                                                                                                 |
| <b>Communication Starter</b> | The purpose of the communication starter (CS) is to help members connect with the same core emotion that the presenter is feeling. The CS is a question that is answered by the members prior to the presenter beginning his/her presentation. |

## Coaching Worksheet (Example)

|                       |                                                                                                                                       |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| Topic                 | Business, Family                                                                                                                      |
| Purpose               | Sam would like the group's experience to help him determine how to deal with two family members in the business who do not get along. |
| Boundaries            | He won't fire his brother-in-law as it would create lots of hard feelings with his wife.                                              |
| Obstacles             | He cannot fire his sister because she owns 51% of the company.                                                                        |
| Feelings              | Fear                                                                                                                                  |
| Cause for feelings    | The future of the company is at risk because key players are not getting along.                                                       |
| Communication Starter | Tell us about a time that you were afraid for the future of your company because two key players were not getting along?              |

### Sample Questions to help the presenter determine the purpose and focus:

- ☐ What is the one thing you'd like to get from the group? (*Hint: it's not advice!*)
- ☐ Realizing that this can be a complicated issue, you may want to present on 3 or 4 things. However, this process works really well if we pick only one of them.
- ☐ Which piece of this issue is the biggest or the one that keeps you up at night?
- ☐ (This has to be a very specific item and it cannot be generic. "Help with my problem," or to "solve my problem," or "to make a tough decision" are all generic and can be applied to almost any presentation).

## The Presentation Process

1. **Confidentiality Reminder and Level**
2. **Communication Starter** – Warm up question led by the coach. (30 seconds/person)
3. **Presenter's Purpose** – The coach writes the following on a flip chart: the purpose of the presentation, boundaries, obstacles, and feelings. (1 minute)
4. **Presenter presents** – Presenter describes the situation and is not interrupted. Interruptions break the presenter's train of thought and the emotional unburdening process. (No more than 15 minutes.)

A presentation consists of:

- ☐ Background – *Relevant history*
- ☐ Current situation – *Situation which has prompted the presenter to present*
- ☐ Options – *Options presenter has considered*
- ☐ Future Implications – *What are the potential outcomes?*

5. **Q&A** -- The Leader controls the order of member participation by making a list of individuals in the order in which they raise their hands, acknowledging each with a nod at the moment they are added to the list and periodically letting the group know who's on the list. (No more than 20 minutes)

Types of questions:

- ☐ Questions to help the member determine which specific experience to share.
- ☐ A thought-provoking question.

6. **Presenter to restate purpose.**  
Experiences can be around the core feeling (if required).
7. **Silence** – This is time for members to think about their experience and write them down. (3 minutes)
8. **Experience Sharing** – Members with applicable, relevant experience share with the group. (No advice, 3 minutes/person)
9. **Presenter's Closing Remarks** – The presenter remarks on "How did the experience feel for me as a presenter?" (3 minutes)
10. **One word close** – Start with the presenter.

## Presentation Preparation Worksheets

### Presenter Outline

|                            |                                                      |
|----------------------------|------------------------------------------------------|
| <b>Background</b>          | <b>(Relevant history)</b>                            |
| <b>Current Situation</b>   | <b>(Situation which has prompted you to present)</b> |
| <b>Options</b>             | <b>(Options you've considered)</b>                   |
| <b>Future Implications</b> | <b>(What are the potential outcomes?)</b>            |

## Planning Successful Retreats

Successful Roundtable Retreats are an essential part of a Roundtable's growth and development. Planning successful retreats requires work and preparation. Consider the following:

|                            |                                                                                                                                                                                                                                                                                                      |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Location</b>            | Ideally the entire Roundtable shares a cottage, a beach house or a venue that provides intimacy and privacy. The ideal location allows members to travel together, sleep together and play together. Sleeping in 10 hotel rooms is not ideal.                                                        |
| <b>Timing</b>              | Retreats are a great opportunity to re-energize the Roundtable. All members should agree upon length of the retreat. A good rule of thumb is 2 to 3 days.                                                                                                                                            |
| <b>Money</b>               | The retreat budget should be agreed upon and collected in advance – sensitivity to different financial situations is important.                                                                                                                                                                      |
| <b>Content</b>             | The retreat content is an important part of the group's development. There are a myriad of exercises to help Roundtables reach that next level. About half the time should be spent doing Roundtable work. The content can provide a good opportunity to take risks and get out of the comfort zone. |
| <b>Activities</b>          | Successful retreats incorporate fun team-based activities. Golf is not a good idea as it divides the group.                                                                                                                                                                                          |
| <b>Scheduling</b>          | Planning a retreat requires advance scheduling. Six months is ideal.                                                                                                                                                                                                                                 |
| <b>Planning Team</b>       | Retreats require planning of agenda, location, facility, activities, and meals. Having other members involved in the planning takes the burden off the the Leader and ensures buy-in by the members. It's a good idea to have a retreat chair.                                                       |
| <b>Outside Facilitator</b> | Many roundtables bring in an outside facilitator every year. This can help the Roundtable sharpen its skills and develop more meaningful bonds.                                                                                                                                                      |
| <b>Group Survey</b>        | Surveying the Roundtable is a great way to clear the air and improve the group's performance. A good time to survey a Roundtable is prior to the retreat. The survey results provide great insight into the retreat planning.                                                                        |
| <b>Fun</b>                 | Fun is an essential component of any retreat. Work alone does not get Roundtable members to learn and grow together.                                                                                                                                                                                 |
| <b>Food</b>                | Dietary restrictions and healthy options are important considerations. A heavy meal can cause drowsiness. Proper planning and ordering are important.                                                                                                                                                |
| <b>Frequency</b>           | Some Roundtables have 2 retreats per year. One per year is the minimum recommended.                                                                                                                                                                                                                  |
| <b>Alcohol</b>             | Discuss alcohol use in advance. Excessive alcohol use can impede the meeting portion of the retreat.                                                                                                                                                                                                 |



## Roundtable Constitution

|                                                   |  |
|---------------------------------------------------|--|
| <b>Mission</b>                                    |  |
| <b>Confidentiality</b>                            |  |
| <b>Gestalt Language Protocol</b>                  |  |
| <b>Commitment to Attendance &amp; Punctuality</b> |  |
| <b>Number of Meetings &amp; Retreats</b>          |  |
| <b>Rescheduling Policy</b>                        |  |
| <b>Fiscal Year</b>                                |  |
| <b>The Member Experience</b>                      |  |
| <b>Cell Phones &amp; Electronic Devices</b>       |  |
| <b>Group Size</b>                                 |  |
| <b>Members Joining Group</b>                      |  |
| <b>Members Resigning from Group</b>               |  |
| <b>Emergency Meetings</b>                         |  |
| <b>Term</b>                                       |  |
| <b>Food/Alcohol</b>                               |  |
| <b>Conflicts of Interest</b>                      |  |
| <b>Meeting Venue</b>                              |  |

## Roundtable Retreat Agenda

### Day 1

|                  |                                                  |
|------------------|--------------------------------------------------|
| 3:00PM - 4:30PM  | _____                                            |
| 4:30PM – 5:00PM  | _____                                            |
| 5:00PM – 7:00PM  | Level III Exercise (must be prepared in advance) |
| 7:00PM – 8:00PM  | <i>Dinner</i>                                    |
| 9:00PM – 11:00PM | _____                                            |

### Day 2

|                   |           |
|-------------------|-----------|
| 8:00AM – 8:30AM   | Breakfast |
| 8:30AM – 9:00AM   | _____     |
| 9:00AM – 10:30AM  | _____     |
| 10:30AM – 11:30AM | _____     |
| Noon              | Lunch     |
| 1:00 – 5:00pm     | Activity  |
|                   | _____     |
|                   | _____     |
|                   | _____     |
| 6:00 - 8:00pm     | Dinner    |

### Day 3

|                   |                                  |
|-------------------|----------------------------------|
| 8:00AM – 8:30AM   | Breakfast                        |
| 8:30AM – 9:00AM   | _____                            |
| 9:00AM – 10:30AM  | _____                            |
| 10:30AM – 11:30AM | What Worked? Retreat Evaluations |

## Retreat Exercises

### Idea Exchange!

What is your favorite Roundtable retreat exercise? Build a list from the group:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

### Build An Exercise

Use the information below to create an exercise for your Roundtable retreat.

**Purpose:** To close the gap between 2 new members and the longer term members of a Roundtable that now has 10 members.

**Timing:** To be done at the opening of the retreat, before dinner

**Length:** No more than 2 hours

**Props:** none!