

# New Forum: Setting your Forum up for success

## Forum Member Playbook

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#### Acknowledgments

Thank you to the team of volunteers who have updated this workbook. Special thanks to members of the EO Forum Committee, the Forum Content and Forum Training communities.

Over the years many people have contributed to the ideas and concepts contained in this workbook and the training programme in general. These people have given of their time freely in order that we might all enjoy a better Forum experience. Your Forum experience is richer for the knowledge they have shared.



# Meeting #1: Building your Forum

Materials/  
preparation

- Forum Training Manual (2019 version or newer)
- Lifeline (if presenting)

Time (H:MM)	Activity	
0:00 - 0:15	Welcome, ground rules and introductions	
0:15 - 0:45	Forum overview: <ul style="list-style-type: none"> <li>• EO</li> <li>• Forum overview and fundamentals</li> <li>• Forum alignment</li> <li>• Forum roles</li> </ul>	<ul style="list-style-type: none"> <li>• FTM p. 4</li> <li>• FTM p. 5</li> <li>• Tools p. 12</li> <li>• FTM p. 15; Tools p. 13</li> </ul>
0:45 - 1:50	Our Forum's constitution and Forum confidentiality	<ul style="list-style-type: none"> <li>• FTM p. 24</li> <li>• Constitution template</li> <li>• Sample constitutions</li> <li>• Confidentiality commitment</li> </ul>
1:50 - 2:00	Break	
2:00 – 2:30	Forum meeting scheduling and retreat discussion	Annual meeting scheduling grid
2:30 – 3:40	Lifelines (3)	FTM p. 13; Lifeline
3:40 – 3:50	<ul style="list-style-type: none"> <li>• Discuss next meeting</li> <li>• Homework: 5% Reflection sheet, Forum name, Forum vision and values</li> </ul>	<ul style="list-style-type: none"> <li>• FTM p. 7 (top), 15 (bottom), 17-18</li> <li>• 5% Reflection sheets</li> <li>• Forum name</li> <li>• Vision and values worksheet</li> </ul>
3:50 – 4:00	Housekeeping and meeting close	

Notes

## Meeting #2: Building and Participating

Materials/  
preparation

- 5% Reflection (filled out)
- Forum name suggestions
- Forum vision and values filled out for discussion
- Lifeline (if presenting)

Time (H:MM)	Activity	
0:00 - 0:05	Confidentiality, Forum pillars and one word open	
0:05 - 0:30	<ul style="list-style-type: none"> <li>• Finalize constitution</li> <li>• Forum vision and values</li> </ul>	<ul style="list-style-type: none"> <li>• FTM p. 24</li> <li>• Constitution template</li> <li>• Sample constitutions</li> </ul>
0:30 - 0:50	Finalize meeting dates and retreat details	
0:50 - 1:50	5% Reflection	FTM p. 15 (bottom), 17-18
1:50 - 2:00	Break	
2:00 - 2:10	Parking lot	FTM p. 19
2:10 - 2:50	Open-coached Deep Dive	FTM p. 16, 19-23
2:50 - 3:50	Lifelines (3)	FTM p. 13; Lifeline
3:50 - 4:00	<ul style="list-style-type: none"> <li>• Clearing exercise</li> <li>• Housekeeping and one word close</li> </ul>	

Notes

## Meeting #3: Transitioning

### Materials/ preparation

- 5% Reflection (filled out)
- Deep Dive materials
  - Coaching worksheet (two copies)
  - Diver worksheet (two copies)
  - iScribe worksheet (four copies)
- Lifeline (if presenting)

### Forum moderator leads with guidance from seed moderator

Time (H:MM)	Activity	Reference
0:00 - 0:05	Confidentiality and one word open	
0:05 - 0:30	Finalize Forum details AND/OR ice breaker	
0:30 - 1:30	5% Reflection	FTM p. 15 (bottom), 17-18
1:30 - 1:40	Parking lot review & Deep Dive selection	FTM p. 19
1:40 – 1:50	Break	
1:50 – 2:35	Deep Dive	FTM p. 16, 19-23
2:35 – 3:50	Lifelines OR open-coached Deep Dive OR topical session	FTM p. 13; Lifeline
3:50 – 4:00	Housekeeping and one word close	

### Notes

## Meeting #4: Fully functioning and appreciating

Materials/  
preparation

- 5% Reflection (filled out)
- Deep Dive materials
  - Coaching worksheet (two copies)
  - Diver worksheet (two copies)
  - iScribe worksheet (four copies)
- Lifeline (if presenting)

Time (H:MM)	Activity	Reference
0:00 - 0:05	<ul style="list-style-type: none"> <li>• Confidentiality and one word opening</li> <li>• Clearing</li> </ul>	
0:05 - 0:10	<ul style="list-style-type: none"> <li>• Ice breaker</li> </ul>	
0:10 - 1:10	<ul style="list-style-type: none"> <li>• 5% Reflection</li> </ul>	FTM p. 15 (bottom), 17-18
1:10 - 1:20	<ul style="list-style-type: none"> <li>• Parking lot review and Deep Dive selection</li> </ul>	FTM p. 19
1:20 – 2:05	<ul style="list-style-type: none"> <li>• Deep Dive</li> </ul>	FTM p. 16, 19-23
2:05 – 2:15	<ul style="list-style-type: none"> <li>• Break</li> </ul>	
2:15 – 3:00	<ul style="list-style-type: none"> <li>• Lifelines OR open-coached Deep Dive OR topical session</li> </ul>	FTM p. 13; Lifeline
3:00 – 3:50	<ul style="list-style-type: none"> <li>• Forum process discussion</li> <li>• Constructive feedback and appreciation share</li> </ul>	
3:50 – 4:00	<ul style="list-style-type: none"> <li>• Clearing</li> <li>• Housekeeping and one word close</li> </ul>	

Notes

## Check-in Meetings: Follow up and feedback

Materials/  
preparation

- 5% Reflection (filled out)
- Deep Dive materials
  - Coaching worksheet (two copies)
  - Diver worksheet (two copies)
  - iScribe worksheet (four copies)

### Forum Moderator Leads

Time (H:MM)	Activity	Reference
0:00 - 0:05	Confidentiality and one word open	
0:05 - 0:10	Ice breaker	
0:10 - 1:10	5% Reflection	FTM p. 15 (bottom), 17-18
1:10 - 1:20	Parking lot review & Deep Dive selection	FTM p. 19
1:20 – 2:05	Deep Dive	FTM p. 16, 19-23
2:05 – 2:15	Break	
2:15 – 3:00	Open-coached Deep Dive OR topical session	FTM p. 13; Lifeline
3:00 – 3:50	<ul style="list-style-type: none"> <li>• Forum process discussion</li> <li>• Forum health, constructive feedback and appreciation share</li> </ul>	
3:50 – 4:00	<ul style="list-style-type: none"> <li>• Clearing</li> <li>• Housekeeping and one word close</li> </ul>	

### Notes

# Meeting Template

Materials/  
preparation

- 5% Reflection (filled out)
- Deep Dive materials
  - Coaching worksheet (two copies)
  - Diver worksheet (two copies)
  - iScribe worksheet (four copies)

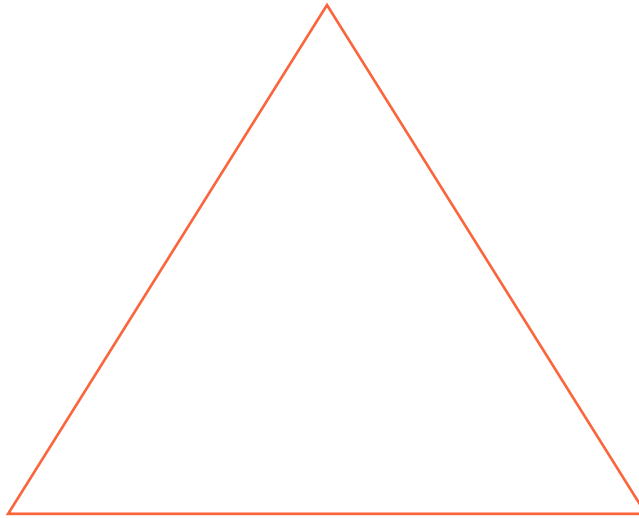
Time (H:MM)	Activity	Reference
0:00 - 0:05	<ul style="list-style-type: none"> <li>• Confidentiality reminder</li> <li>• One word open</li> </ul>	
0:05 - 0:10	<ul style="list-style-type: none"> <li>• Ice breaker</li> </ul>	
0:10 - 1:10	<ul style="list-style-type: none"> <li>• 5% Reflection</li> </ul>	FTM p. 15 (bottom), 17-18
1:10 - 1:20	<ul style="list-style-type: none"> <li>• Parking lot review</li> <li>• Select next Deep Dive(s) and today's open-coached Deep Dive</li> </ul>	FTM p. 19
1:20 – 2:05	<ul style="list-style-type: none"> <li>• Deep Dive</li> </ul>	FTM p. 16, 19-23
2:05 – 2:15	<ul style="list-style-type: none"> <li>• Break</li> </ul>	
2:15 – 3:00	<ul style="list-style-type: none"> <li>• Deep Dive OR</li> <li>• Open-coached Deep Dive OR</li> <li>• Topical session</li> </ul>	FTM p. 16, 19-23
3:00 – 3:50	<ul style="list-style-type: none"> <li>• Deep Dive OR</li> <li>• Open-coached Deep Dive OR</li> <li>• Topical session OR</li> <li>• Strategic Member resource learning session (EO sponsor or another expert)</li> </ul>	
3:50 – 4:00	<ul style="list-style-type: none"> <li>• Housekeeping</li> <li>• One word close</li> </ul>	

## Notes

# Tools

## Alignment Triangle Exercise

Actively participating in a group where I can be myself - normal and relaxed.



Tips, tool, techniques, strategies and processes that I can use immediately to transform my business.

Developing self-awareness as a leader in various aspects of my life; gaining perspective on how my own behaviors positively or negatively impact situations.

# Annual Forum roles

Assigning annual Forum roles serve several purposes.

- 1 Get all members actively involved in the running of the Forum.
- 2 Alleviate the moderator's burden.
- 3 Keep the Forum running smoothly.
- 4 Avoid things "slipping through the cracks".

**Process**

1. Determine the roles you would like to assign. Try to have as many roles as members in your Forum.
2. Ask each Forum member to volunteer for a role. Alternatively, the moderator can assign roles.

Role	Name	Description / Tasks



# Constitution template and examples

## Constitution guidelines

- Each Forum writes its own constitution
- The constitution should be reviewed and updated each year
- Establish alignment of group mission
- Define expectations of member participation
- Enable maximum benefit and value of Forum to all members

Here is some sample content that you might find in a Forum constitution.

<b>Mission and vision</b>	To share, learn, and grow personally and professionally as individuals and as a Forum.
<b>Confidentiality</b>	Any breach of confidentiality will result in immediate expulsion from the Forum. After a Forum discussion (impact, apology, etc.), the offending member may be readmitted only by unanimous vote.
<b>Fiscal year</b>	1 July to 30 June
<b>Number of Meetings and Retreats</b>	Eleven meetings and one retreat are held each year. One of the meetings may be social and is counted for attendance purposes.
<b>Attendance</b>	A member who misses two meetings or a retreat within a fiscal year is automatically removed from the Forum unless unanimously voted back in.
<b>Tardiness</b>	A member who is late for one meeting is docked for one-half an absence and fined US\$___ per minute, up to US\$___.
<b>Forum Mindset (Gestalt)</b>	Forum members will follow the Forum mindset (Gestalt) and speak only from experience at our Forum meetings.
<b>The member experience</b>	Each member of Forum is responsible for his or her own Forum experience.
<b>Cell phones and electronics</b>	No cell phones are allowed during Forum meetings or retreats, except during designated times or as pre-approved by the Forum. Violation results in a US\$___ fine.
<b>Group size</b>	Our forum will have 8 - 10 members.
<b>Members joining Forum</b>	Members joining the Forum must meet majority consent of the existing members.
<b>Members resigning from group</b>	Members resigning from Forum are expected to make an exit deep dive. A member who chooses not to make an exit deep dive forfeits his or her unspent balance of Forum dues.
<b>Emergency meetings</b>	Emergency meetings are available to a member in need. Attendance is not mandatory.
<b>Term</b>	Moderator, secretary and financial officer have one-year terms coinciding with the fiscal year.
<b>Food/alcohol</b>	No consumption of alcoholic beverages is permitted during meetings or prior to meetings. Drinking during retreats is only permitted during designated times. While food may be available, it should not distract from our Forum experience. Respecting divers is expected.
<b>Business dealings</b>	All business transactions more than US\$_____ are strongly discouraged among Forum members and must be disclosed to the Forum.
<b>Romantic relationships</b>	No romantic relationships are permitted among Forum members.

## EO Forum confidentiality commitment

I understand that in order to achieve the level of trust necessary to ensure the interchange we all seek in Forum, all information shared by the membership must be held in absolute confidence. I understand that any discussion of Forum business outside of the meeting by two or more Forum members can only be held in person or by secure means. This excludes public settings, such as a restaurant or airplane, where there is a high probability of being overheard.

I understand no Forum business can be discussed with anyone outside the Forum, including spouses, significant others, other EO members or non-EO members.

### Never – Nobody – Nothing

Should a break in confidentiality be suspected, the Forum moderator must be notified immediately. The moderator will investigate the allegation and report to the Forum at the next scheduled meeting, or at a specially called meeting, as the moderator determines.

If the moderator is the accused, the Forum will choose an interim moderator until the issue is resolved.

I understand that breaking this contract will result in being asked to resign from the Forum.

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

**Forum name:**

**Member signature:**

**Printed name:**

**Date:**

## Defining your Forum values / vision

### Our Forum's values

Values are non-negotiable rules of the road that we all follow. Use as a filter when adding new members and as a basis of removal for members in violation of those values.

#### Discussion and exercise:

Who has a business with core values? How were they created? How are they used? Are they living in the company—or collecting dust on a shelf? Share and discuss briefly.

Core values help us understand how to show up to Forum, how to interact with each other and general expectations. Now, let's work to create our own core values for total inclusion in our Forum experience.

- Think of the best Forum member/team member you've ever known. What made him/her a great Forum-mate/teammate? Write down the most important attributes that made that person great.

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- Think of the worst Forum member/team member you've ever known. Write down negative characteristics that you want to avoid in your Forum.

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- Work with your trainer to flip negative characteristics to their opposite. Narrow the list and determine your top 3-5 Forum values.

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- Our Forum's values

1.	2.
3.	4.
5.	6.

- We recommend that you embed your Forum's values into the header or footer of your Forum agenda and review them often. They should become part of your regular vocabulary and interactions.

- Review your Forum values each year—along with the constitution—at your retreat and/or when you choose moderators.

## Our Forum's visionOur Forum's vision

Our Forum's vision is a picture of where we want to be in the future. We will use a 2-5 year horizon for this process. Do any of you have a company with a vision statement? How did you create it? How does it work for you and your employees?

Let's work to craft our own vision statement so that we know where we're going.

Take a few minutes to answer these questions for yourself:

1. Why do you want to be a part of this Forum?

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2. What are you hoping to get out of your Forum experience over the next few years?

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3. What do you want your business to look like in the next few years? What are your longer-term business goals?

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4. What do you want your life to look like in the next few years? What are your longer-term personal goals?

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5. What does your Forum look like in the next few years?

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6. Look at your answers to the questions above and pull out the key words and feelings to be used in a vision statement.

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Your trainer will lead you in a discussion to pull out key words and common themes. One member of your Forum should volunteer to craft a vision statement based on your discussion that captures the essence of what your Forum wants out of this experience. Ratify your statement at your next meeting.

### Forum member assigned:

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Just like your Forum values, your Forum vision should be embedded in your monthly agenda until it becomes part of the fabric of your Forum. To ensure your vision is living and working for you, revisit your vision statement at a retreat and/or when you change moderators.