

Confidentiality

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Chris has been the GM of a club for several years. It is a club embroiled in political upheaval and constant infighting causing a great deal of angst amongst the staff. Chris needed to replace a high-level administrative person who voluntarily left the club after decades of service. Chris hired Pat who was initially expert at the position and worked 14-hour days to become specifically expert on the club's issues. Pat worked very hard under impossible conditions, earned the respect of the staff, and the club leadership. However, Pat could be abrupt and was, sometimes, difficult to understand. Pat might be considered hard headed and a bit stubborn, the situational stress did not help the situation. Chris and Pat had a strong business relationship.

Chris left that club for another. During a conversation with new manager Paul, it was let slip that there was a search for a new person, and that Pat, unbeknownst to Pat, would be replaced. Paul immediately realized the slip and asked that the information be kept in confidence.

Chris has a dilemma: tell Pat and betray the confidence of a peer or leave Pat in a disadvantageous position.

We posed this question to managers across the country and received some very interesting responses. Thirty-five Percent would tell Pat of the impending doom and Sixty-five percent would hold the confidence.

We received a host of responses which, as shown above, covered both sides, with a lot of middle ground.

Some responses fell on the side of friendship, such as "If Pat were a close friend, I think I would make him aware without directly implicating that the information came from the new GM." Or, more to the point, "I would tell him – my obligation / loyalty to my friend and former colleague is the greater good than maintaining the new manager's confidence."

One response was one of personal responsibility, "Chris owes Pat a warning of his pending termination. He knowingly brought Pat into a difficult and stressful club, and he got out. The club does not sound like the kind of place that cares too much about the staff, why protect them? You come to find out the longer you work in clubs that clubs don't care. Staff come and go, managers are transient and replaceable. Boards live on and they have become more dysfunctional through bad economies, bad governance and micromanagementitis (new word I

just created). Chris' role is to protect his staff, current and former. No one is looking out for them. The cards are stacked against them. He (or she) cannot betray them."

Others breached the gap between friendship and business with a response such as, "Assuming Pat has not been given fair opportunity to correct his shortfalls, I would advise the new GM that either he inform Pat of the search or I would. I believe there is an ethical issue here. I have a strong working relationship with a former employee who deserves to know that he doesn't fit in with the new management plan. Also, he has 'earned the respect of the existing staff and club leadership', and they are doing him a tremendous disservice by not informing him. The only thing that maybe could alter this response is if I was informed that Pat would be getting an awesome package on his way out that would enable him to be kept whole while searching for his next position. And that's a big maybe."

Another tactic was one of inform if asked, yet protect the club-networking relationship, "Integrity is a strong trait of mine and it helps keep me centered. In this situation I would take the middle road and inform Pat, only if she inquired, as it is none of my business. I would not reach out to her as it would be an overt breach. I would also do what I could to assist Pat any way I could in her transition. Over the years I've learned never to 'burn a bridge'. This is especially true in the close-knit network of Private Clubdom." Another more specific approach is, "I would respectfully ask the new manager to inform Pat that he is being replaced."

Most responses were on the side of maintaining the peer confidence, "Chris should want to keep good relations with the new manager. Maintaining the requested confidentiality is a professional obligation as well." There was also consideration of the fact that once we leave a club, we need to leave the club, "I would maintain the confidence as requested by my peer. Once Chris departed his former club, he left his right to weigh in at that club."

However, there was common thread that Chris should not inform Pat, yet, maybe the intention was to have Pat informed, "I would not inform Pat of the impending termination. If informed it betrays the confidentiality of the matter; would serve to possibly cause Pat to be disruptive and argumentative; and allows Pat to possibly work out a separation agreement/settlement if he leaves without incident. I am not so certain it was by accident the new manager let 'slip' Pat was being replaced. Knowing the bond between Chris and Pat, it is reasonable to suspect that he believed Chris would inform Pat thus easing the difficulty for the new manager to terminate."

While maintaining the integrity of peer confidentiality, one manager had several suggests:

"I would make it known to Pat one of many ways:

1. Based on our good relationship, I would drop hints urging her to start looking for another job. Best, if I know of a job elsewhere that would fit Pat, I would send her the info and urge her to look into it. Why? Because with new management, change is inevitable etc etc .
2. If it helps Pat to know in advance for whatever reason, I would mention that 'rumor has it...' As the former manager of that Club, I have continued relationship and communications with members and staff alike...'Pat, it just doesn't sound good...I could

be wrong as I'm reading between the lines.' All without jeopardizing the source. Yes, I would protect the source...what comes around, goes around!

3. I would have to put my relationship with Pat and my relationship with my colleague on a two-sided scale and pick which one I want to protect more."

Further, "Caring about Pat, I would friendly stress to Pat that she needs to manage the way she is perceived in the eyes of others to protect her work, her position and her relation with the new GM. 'Hey Pat, you now have a different manager who views things differently...have a convo with him...try to understand what he wants...there's a new sheriff in town and we have to do things his way, etc.' This could have a positive effect all around."

Some responses were to the point, "Leave Pat in a disadvantageous position" Or, "For me this is easy- I keep the confidence of the new manager. Business is business, and personal needs to stay a distant second. And no trouble sleeping at night either, btw."

The above scenario is a real-life issue that has an ending which is relatively happy. As our managers began to respond to the issue, our real-life Chris was given a heads-up on some of the suggested solutions and decided to implement a combination. Chris spoke to Paul and simply gave some background on Pat, explaining what a nightmare the situation was when Pat arrived and how hard Pat worked to make a tough situation better. And, yes, Pat can be hard-headed, but the key to getting Pat to relax was to show empathy and understanding. Paul was unmoved by the information and continued to recruit for the position. Chris spoke with Pat in order to gain Pat's perspective on the situation. Pat related, as expected, that things were not good and getting worse. Taking advantage of Pat's awareness, Chris suggested that Pat might consider alternatives. In the end, Pat gave notice and worked out a very accommodating time-period, always maintaining work integrity. Paul, given ample time by Pat, was able to recruit for the position, find someone suitable, and get that person on board shortly after Pat's departure.

By utilizing our CMAA network of managers, Chris was able to gain perspective in solving a significant dilemma in which peer relationships were maintained, as well as loyalty to a friend. And, all ends well.

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