

Making change by changing how we work together

Participation and confidentiality

Introduction

The relational nature of CORE's matchmaking and grant-making processes raise interesting questions related to confidentiality and conflict of interest.

We recognize that some of the information organizational leaders share as they seek capacity-building support may be sensitive. When shared with consultants and coaches, this information often is held confidentially. Similarly, information shared by consultants about past experiences and references may be sensitive. In the marketplace, information gathered while hiring a consultant is generally held with the level of confidentiality expected for other personnel matters.

The boundaries around confidentiality are a little different in the CORE project. We deliberately share information with a larger team in order to improve the fit and outcomes of capacity building projects. However, we still pledge to respect the sensitivity of the information shared, and to be explicit and transparent about where, how, and why we share information.

Participation guidelines

This section is designed to guide potential Connectors and applicants in choosing how and when to participate so as to minimize the potential for conflicts of interest, whether actual or perceived. Our intention is to allow for full and free participation of all applicants and Connectors and to avoid situations in which a Connector's prior knowledge of or influence with an applicant affects the outcomes of CORE's matchmaking or grant-making processes.

CORE is most interested in two types of relationships between Connectors and applicants:

- **“Too close”** for simultaneous participation—In this case, the Connector is paid by, on the board of, or in a decision-making volunteer role with an organization applicant or consulting applicant. In this case, for the current round, CORE expects only one of the parties to participate. In other words, either the Connector or applicant must withdraw. Withdrawal from any particular round won't preclude participation in a future round, provided the relationship has altered or the parties alternate who participates.
- **“Just fine”** for simultaneous participation, provided certain types of disclosure are provided—In this case, the Connector is a volunteer with an organization applicant or consulting applicant, but in a role without decision-making authority, or in the past has been paid by or on the board of that applicant. In this case, for the current round, CORE expects the Connector to request not to be paired with that consultant or organization for a Learning Conversation. CORE will make an explicit request for this information; we ask only that Connectors be clear and direct in their responses.

In all other cases we can foresee, simultaneous participation of a Connector “related to” an applicant may require tact and good will, but won't result in the potential for skewing the results of the CORE process. As with all of CORE's work, these guidelines are a work in progress. Let us know if you see something missing so we can refine our work together.

Confidentiality expectations

All sharing of information within the CORE process is intended to advance its purpose—to connect the right people and resources for the right projects to expand capacity to build a better world. Specifically:

1. Information gathered in applications, face-to-face Learning Conversations and reference checks will be shared with the CORE Steering Committee and roughly 20 members of the Connector Team as needed to facilitate finding a good match. These teams of consultants, organizational leaders, funders, community leaders and volunteers agree to set aside other interests to work together in service of the best interests of CORE’s applicant organizations.
2. During discussion of a particular organization or consultant, CORE participants (including applicants and team members) will share information in a respectful manner with the intent of building on existing strengths. Team members will share information only when doing so is expected to contribute to the success of CORE “matches.” Elevated awareness of the impact of our assumptions and judgments is expected. Gossip, overgeneralization, and use of biased or indiscriminate language are not appropriate and will be discouraged.
3. CORE team members will not initiate outside conversation with applicants about sensitive topics covered in their application materials, Learning Conversations or reference checks. All participants (including applicants and team members) agree not to discuss in public information reasonably considered sensitive without consent of all subjects of the sensitive information.
4. After consulting engagements are complete, CORE will survey/interview participants to learn from the experience. This information will be shared in some form with all interested parties, including members of CORE’s Founders’ Circle and Builders’ Circle and potential future funders. Specific organizational and individual identities will be protected in written and verbal reports wherever it is possible to do so without compromising the learning and capacity building objectives of the project.
5. Exceptions to these guidelines may be made in cases where safety or legality is at issue.

Our commitment

All participants in the CORE process will be trained in these guidelines. Anyone unwilling to commit to following these guidelines will be removed from participation.

Participant commitment

As a participant in CORE, I agree to honor the spirit and expectations of the participation and confidentiality guidelines set forth in this document.

If I have any questions or concerns at any time about my conduct or the conduct of others with regard to CORE’s participation or confidentiality guidelines, I promise to contact Rebecca Krantz immediately by calling **608.213.7207** or emailing krantz@manystonesconsulting.com.

Signature

Printed name

Date

