

10 Tips for Using Guidelines

Using guidelines during a learning or work event can be extremely helpful (and sometimes paramount to a successful session!). Below are a few things to keep in mind for ensuring they are relevant, needed, and meaningful.

1. **Use Guidelines for especially difficult groups or topic, multi-day events, or when you think issue around power may arise.** Generally, shorter events don't have Guidelines.
2. **Use Operational Guidelines that everyone understands will always be used for regular meetings.** It would be healthy to create these with the group initially, and then check in with as needed. They can be read aloud and changed as needed.
3. **Always invite the group to suggest most of the guidelines.** It's good to start off with one or two that are important to you, but then the rest should come from the group.
4. **Always make sure that every individual agrees to the list generated.** I sometimes ask people to raise their hands or nod their head, if I know these guidelines are critical or were not easy to write. This should be done quickly, but then you really know everyone has agreed and you can hold them accountable.
5. **Post the guidelines somewhere visible to all.** It is important that you be able to gesture to them as you read them, and that people can remind themselves of what they promised as needed.
6. **Take time agreeing on "the cellphone issue".** Everyone has different ideas about this and this issue can carry emotional "energy", so it is best to really open it up to make sure there is true agreement.
7. **For a multi-day event, check in at the beginning of each day** to see what needs to be added or changes, and to make sure everyone is still in agreement.
8. **On the first day of a multi-day event or even on a 1-day event, check in** with the list (quickly) after lunch. Sometimes things change or something happens that people realize they need a guideline around.
9. **If someone is not following the guidelines, it is best to first check in with them privately.** Sometimes people forget or misunderstand guidelines, and just need to be reminded. Sometimes they don't really believe they are "serious," in which case you will need to clarify this.
10. I always include a guideline about personal needs: **"Attend to your personal needs."** This gives people "permission" to stand when needed, get a coffee or go to the bathroom without having to ask.