Examples of Operational Guidelines

1. At the beginning of each meeting, the training team facilitator and team members will:

♦ Clearly state and agree on the purpose of the meeting

♦ Review progress and achievements from previous meetings as reflected in the written summary prepared by the training facilitator

2. Agree to focus on problem-solving dialogue, while avoiding potentially damaging debates (refer to companion guidelines)

3. Recognize that conflict and diversity are assets to be maximized, not problems needing to be avoided and suppressed, and develop conflict resolution procedures.

4. Agree on procedures that ensure that every voice is heard and that the problem-solving dialogue is focused, detailed, and productive. For example:

♦ Avoid long speeches by asking each person to identify and describe briefly just one problem, need, improvement strategy, or obstacle

♦ Use round robin strategies to ensure that everyone has the opportunity to offer perspectives on, and ask questions about, this problem, need, strategy, or obstacle

♦ Develop a logic model, including the specific need or problem; its causes; desirable solutions; and anticipated results and benefits

♦ Reach preliminary consensus on the likely facilitators, constraints, obstacles, and barriers for improvements (e.g., co-workers lack certain competencies)

♦ Identify barrier-busting and problem-solving mechanisms (e.g., design and deliver training that develops co-workers' competencies)

5. Agree on "a parking lot" for ideas that are not immediately relevant and useful; and revisit the parking lot during the debriefing process (see guideline below).

6. Do not "lump together" too many needs, problems, and priorities so that you end up with an unmanageable problem.

7. Because the team may have to make some hard choices, develop a prioritizing process that is acceptable to all members. For example, agree on a method for selecting the five most important identified areas of improvement (e.g., voting with "stickies" and "dots"); and then put the remaining issues in the "issue and idea parking lot."

8. Chunk" out action steps as often as possible in CONCRETE ways that demonstrate to the team and others that progress is being made. Do this as early in the process as possible to help get some momentum going for the team.

9. Develop an orientation/mentoring process for members joining late in the process and for members who miss a meeting. For example, develop a "buddy" system where 2-3 members take someone new to lunch a week or so before the meeting, provide them with copies of materials, and try to bring them up to speed as much as possible to avoid taking valuable time in the meetings going back to square one.

10. At the midpoint of each meeting, the team facilitator will do process, progress, and product checks, helping to ensure that the problem-solving dialogue and interactions are healthy and productive.

11. At the end of each meeting, the team facilitator and team members will debrief, summarizing progress, achievements, and barriers; celebrating successes; and identifying next steps.

17