

# WPO Norms and First Meetings

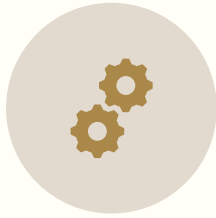
Foundations

Feb 2026

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# Other Names for 'Norms'

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**Standard Operating Procedures (SOP)**



**Group Charter**



**Constitution**



**Meeting Agreements  
/ Working  
Agreements**



**Operating Guidelines**



**Rules of Engagement**

# Importance of Norms

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# Importance of Norms

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**Purpose:** Gain agreement on the ideal behaviours to support high impact meetings.

1. Support a healthy chapter culture.
  2. Help Members and Chairs appreciate their responsibilities.
  3. Provide a reference point if things go sideways.
- **Best Practice:** Set it up at the outset and revisit chapter Norms at least annually.

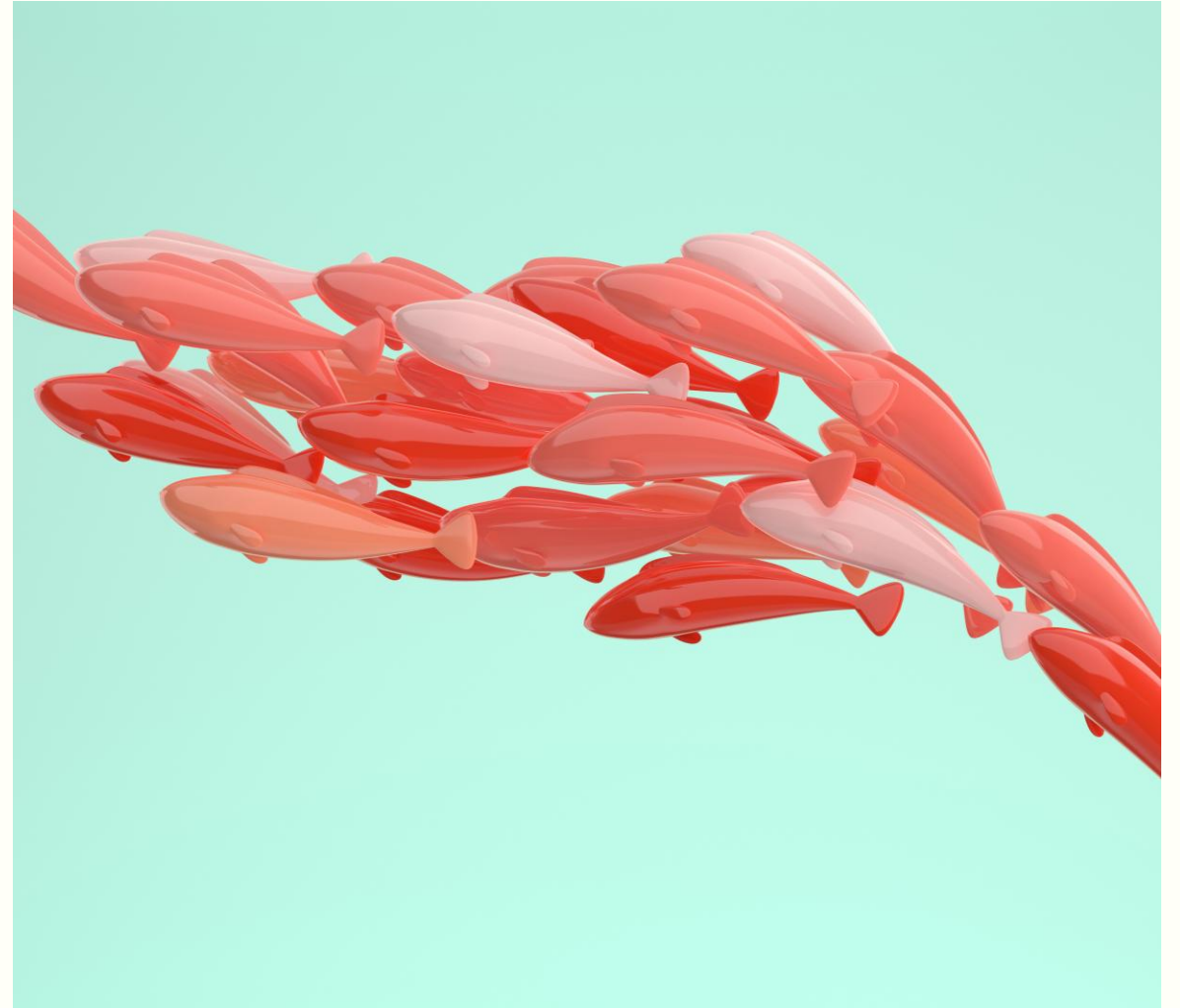
# Norms in Action

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Think of a successful meeting, when everything went smoothly and the members were highly satisfied. What behaviors helped make it successful?

**Pop 1-3 key words in chat**

What norm is most often challenged in your chapter?



# **Poll: Top Norms (your current documented norms )**

**Be fully present – no cell phone use etc..**

**One person speaks at a time**

**Respect the timer**

**Attendance requirements**

**Members help attract and introduce new members**

**Members plan social activities**

**We honour PeerView™ (experience share / no advice)**

**Members prepare their Update in advance**

**We demonstrate WPO values**

**We collaborate with other chapters in our region**

# Establishing Norms

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- Co-created agreements driven by you.
- Highly influenced by Chair modelling.
- Very important to establish healthy patterns in first 1-6 meetings.
- Spectrum of formality – highly variable across chapters.

# Spectrum of Formality

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**Too Few Norms**

(Possible Chaos)



**Clear Simple Norms**

(Sweet Spot)



**Too Many Rules**

(Ignored / Overwhelming)



# How to Establish Norms

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## 1. Menu

- Provide a list of options
- Explore which 3-5 of these feel most important for the chapter
- Discuss, visual vote, anonymous vote etc..

**OR**

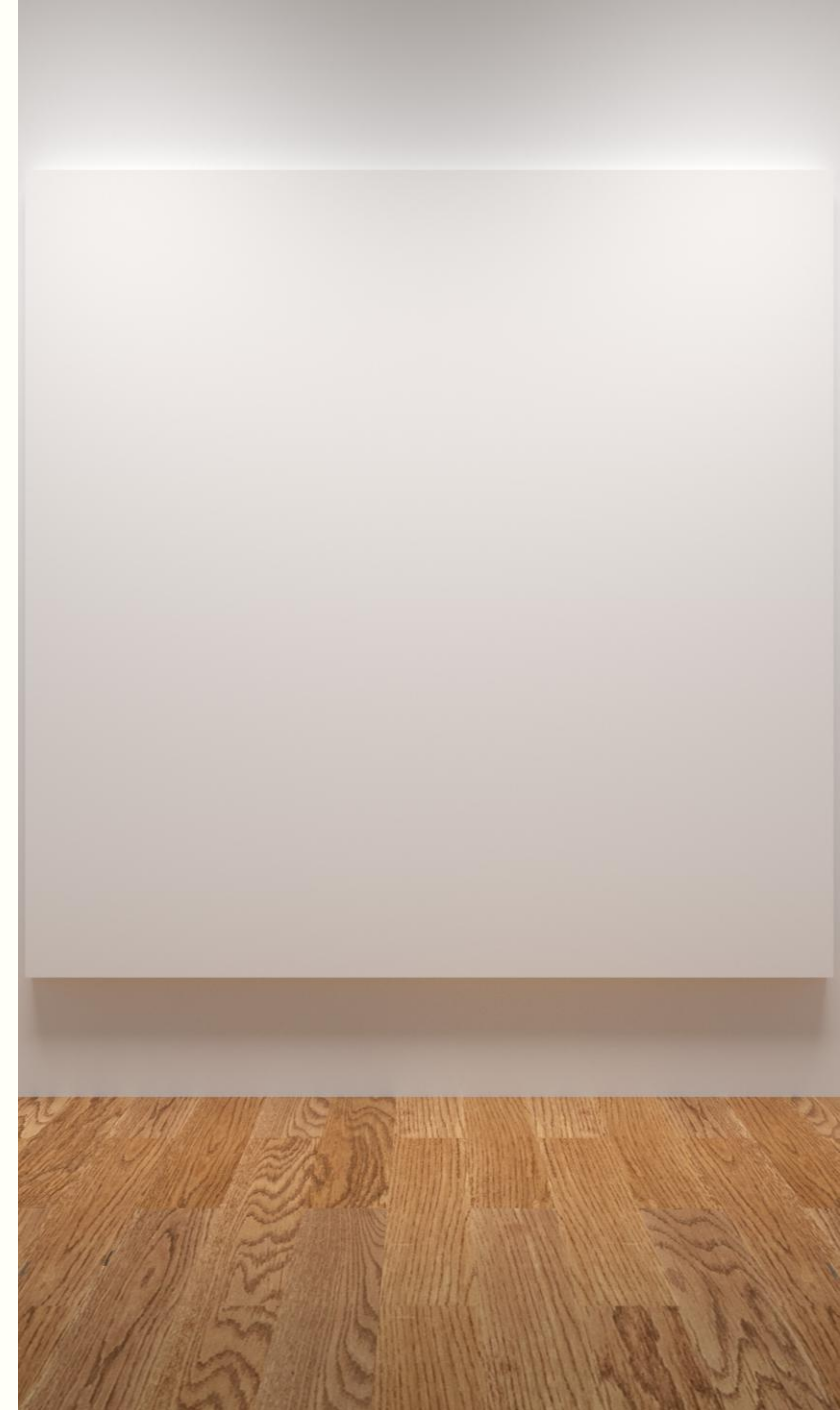
## 2. Positive / Negative Experience

- Ask members to reflect on past group experiences – what have they valued and what has been frustrating

**OR**

## 3. Blank Canvas

- Ask “What behaviors will help this chapter work well and make these meetings valuable for everyone?”



# WPO Guide

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WPO has guidelines for all chapters and chapters should plan to establish written and agreed to norms beyond those listed below. The following are Meeting Norms from WPO:

## REQUIRED:

- **Confidentiality:** Confidentiality is a non-negotiable of WPO meetings. We encourage all Chairs to discuss the nuances of confidentiality with their chapters regularly. For full confidentiality policies of the WPO, please reference the WPO Membership Policies document.
- **Use of alcohol:** Alcohol is not allowed during meetings and should be limited to times after the meeting, NEVER before or during the meeting.
- **WPO PeerView™:** Chapter agrees to honor the WPO PeerView™ method for the majority of our meetings.

## SUGGESTED:

- **Suggested attendance requirements:** Some chapters may set a limit on the number of meetings a member can miss without extenuating circumstances, reinforcing consistent participation and trust within the group.
- **Observe time frame on agenda:** Every effort should be made to adhere to the agenda's timeline. If a change is needed, the group should give consent to the change.
- **Setting agenda and expectation for next meeting:** Agenda setting should happen in the last few minutes of the meeting. Any needed special arrangements should be discussed with the full group. Planning for meetings two to three sessions out will ensure productive use of time.
- **No side conversations:** Avoiding side discussions during the meeting is essential for maintaining focus and building trust.
- **Use of cell phones:** All phones are to be turned off prior to the meeting.
- **Social time and food:** Social time before or after the meeting is encouraged to help speed up the bonding process. The Chapter Chair should also be aware of any "cliques" forming and make every effort to avoid negative impact of individual friendships formed.

# Sample Norms

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- 1. We have the highest standard for confidentiality.
- 2. We agree to honor the WPO PeerView™ for the majority of our monthly meetings (80/20 rule).
- 3. No alcohol at meetings
- We aim to attend 9 out of 12 meetings, + retreat, special events and the annual Forum.
- We agree to help recruit other members to ensure a vibrant & engaged group
- We agree that social events will be planned by members.

# Sample – 5 Pillars SOP (Standard Operating Procedures)

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**1. Candor, Transparency, and Authenticity:** Encourage open and honest communication among members. Respect confidentiality and refrain from disclosing sensitive information shared during meetings. Foster an environment where members feel comfortable expressing their views without fear of judgment.

**2. Level of Focus:** Stay focused on the agenda and relevant topics during discussions. Remove distractions (cell phones, tablets, etc.) Avoid tangential conversations that detract from the primary objectives of the meeting. Allocate time efficiently to address key issues and explore potential solutions.

**3. Inclusion:** Ensure all members have an opportunity to contribute to the discussion. Respect diverse perspectives and experiences within the group. Encourage active participation from all members regardless of seniority or tenure.

**4. Accountability:** Hold oneself accountable for personal contributions to the group. Commit to preparedness by reviewing relevant materials and reflecting on discussion topics before each meeting. Hold each other accountable for following through on action items and commitments made during meetings.

**5. Engagement:** Actively engage in discussion by listening attentively and offering constructive input. Respectfully challenge ideas and assumptions to stimulate critical thinking and innovation. Foster a collaborative environment that encourages brainstorming and creative problem-solving.

# WPO CORE VALUES

Values are operational tools. They help you set norms clearly, manage meetings confidently, and handle tough moments without personalizing conflict.

1. **COMMUNITY-MINDED:** Karen organizes social activities on behalf of the chapter
2. **INSATIABLY CURIOUS:** Shannon asks a question she genuinely does not know the answer to.
3. **SUPPORTIVE:** Kerry offers to connect to share expertise and resources for a deeper dive.
4. **TENACIOUS:** Tracie shares her challenging & high-risk experience buying a building.
5. **THOUGHTFUL:** We paused a meeting to check in with a member when the topic got very emotional.

# Courtesy Bias

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Public Agreement,  
Private Complaints



- Members publicly say:  
“Sure, that works.”
- But privately say:  
“The Chair shares  
too much.” OR  
“The meeting  
format isn’t working  
for me.”

# Toolkit – Pulse Check

At least once a year, ask members anonymously:

- What could we do more of?
- What could we do less of?

OR.....

Scale (1–5)

1. Overall, how valuable are our chapter meetings for you?
2. How well are we living our chapter norms?
3. What is one thing that would improve the quality of our meetings?



# Confidentiality – Non Negotiable

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**Purpose:** Support members to trust each other to share openly and vulnerably.

## Sample Guidelines + Best Practices

- Inside and outside meetings – the dome of confidence holds (“in the vault”).
- No sharing with anyone outside of the chapter including partner or spouse.
- No sharing good news, even though it can be very tempting.
- If it’s in the media, you can talk about only what is being shared publicly.
- No carry-over to social time after meetings.
- No sidebars unless issue holder is present.
- Clear the room of evidence – post its, notes, etc...
- The confidence extends even beyond a chair or member’s departure from a chapter.
- NO recording



# Confidentiality

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When confidentiality is breached...

Goal = repair and rebuild trust

- **Speak with member first**
- **Address member who shared info**
- **Encourage both members to speak to each other**
- **Bring back to the group if appropriate**



# Communication of Norms

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- ❑ Chair as model
- ❑ Share with members shortly after drafting / store for easy access
- ❑ Reinforce positive alignment at meetings / gently challenge breaches
- ❑ 1-1's as needed
- ❑ Revisit as needed (new members / breach of norms / annual re-set)

# Meeting Tracker Sample (red=absent, yellow=late, green=present)



	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	PV session	Note Taker	15 min	Retreat	Forum	Summit	Food	Notes	
imiec	red	green																			
ls	green	virtual																			Feb
ttner																					
gston																					Feb
s																					
	red	green																			
son																					
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olson	red	green																			
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e		red																			

# Importance of First Meetings (1-4 months)

## 1. Connection

Facilitate familiarity, build trust, and foster relationships.

## 2. Culture

Welcome diversity, establish positive culture, encourage candor.

## 3. Craft

Build norms, intro PeerView™, establish meeting rhythms & logistics



# First Meetings

## BUILDING TRUST IN THE FIRST CHAPTER MEETING



*Strong chapters are built intentionally in the first few meetings.*

# Designing First Meeting(s)

## Key Agenda Components (3-hour)

1. Welcome (tone and purpose)
2. Member intro's + business story
3. Gentle practice of PeerView™  
Member Update Form
- 4. Norms conversation**
5. Schedule and logistics
6. Reflection and close

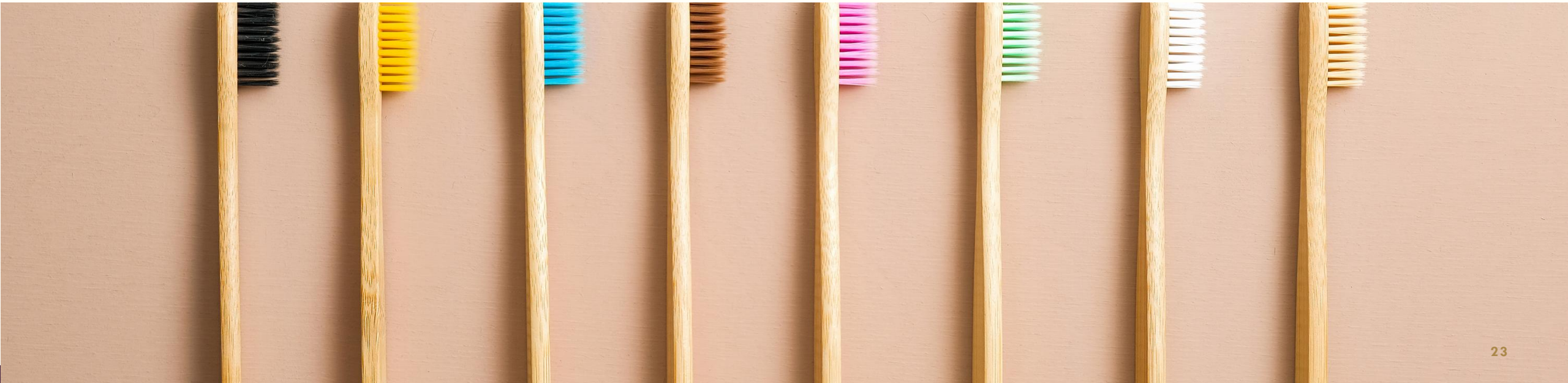


# Chapter Care

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## Kick off or end meetings with:

- WPO announcements (Forum, Harvard, Newsletter items)
- Retreats
- Speakers and special events
- Asks and offers etc...
- Scheduling 15 Min Focus / Ask me Anything sessions



# Resources

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- **Sample Chapter Norms from Chairs**
- **Sample: Golden Rules of Confidentiality**
- **Meeting Tracker Tools** (track attendance /late arrivers, PeerView sessions, 15 min Focus / Ask me Anything / Notes etc...)
- **WPO PeerView™ Toolkit**
- **Chair Success Path**
- **Quick Reference Guide**

# Toolkit – WPO PeerView™ Steps

## PEERVIEW™

### 1. BUILD TRUST

Timed, succinct update with emphasis on significance and emotion related to key updates.

MEMBER  
UPDATE

### 3. INFORM

Insight into the key issue and desired outcomes. Sets members up to support the presenter.

PRESENTATION

### 5. LEARN AND GROW

Fosters learning and drives next steps. All members can benefit.

EXPERIENCE  
SHARE

### 7. FOCUS ON FUTURE

SMART mini goals for monthly accountability and continuity.

ACCOUNTABILITY

### 2. NARROW FOCUS

Process of choosing the highest priority issue for the group to collectively work on.

ISSUE  
SELECTION

### 4. DIVE DEEPER

Provokes deeper thought and stimulates ideas. It can also hint at experience share.

QUESTIONS

### 6. EMBED LEARNING

Reflection on learnings, feelings, and next action steps. All members can participate.

REFLECTION

## 6. Reflection (5 min)

### EMBED LEARNING

Reflect on learnings and next action steps. All members can participate.

## 7. Accountability (10 min)

### FOCUS ON FUTURE

All members share SMART mini goals for monthly accountability and continuity.

## 4. Great Questions (15 – 45 min)

### DEEP DIVE

Provoke deeper thought and stimulate ideas.

*INQUIRY VS ADVICE*

## 5. Experience Share (15 – 45 min)

### LEARN AND GROW

Foster learning and drive next steps. Benefits all members.

*EXPERIENCE VS ADVICE*

## 2. Issue Selection (5 min)

### NARROW FOCUS

Choose the highest priority issue for the group to collectively PeerView.

## 3. Issue Presentation (7 – 10 min)

### INFORM

Gain insight into the key issue and desired outcomes. Set members up to support the Presenter.

## 1. Member Update (30 – 75 min)

### BUILD TRUST

Timed (3 min) succinct updates with emphasis on significance. Draws out meaningful issues. Foundation of an effective PeerView meeting.

# Toolkit - Sample Agenda (for 15 members)

Topic	Timing	Purpose / Tools
Welcome & Chapter Care	10 min	Share relevant info: Events (EEF, Retreat, Socials), Resources (Harvard Spark), Sponsor Info etc.
1 Member Updates	45 – 60 min	Hear from each member using the <b>PeerView Member Update Form</b> . Listen for issues and opportunities. Ideally, 3 minutes per member.
2 Issue Identification and Selection	5 min	Selection or voting process to choose a member's issue for the group to work on. Use <b>Eisenhower Matrix – Urgent / Important</b>
Break	10 – 15 min	Snacks. The presenting member needs to use this time to start preparing for their presentation.
3 Issue Presentation	5 – 7 min	One member presents their topic using the <b>PeerView Presentation Guide</b> . Chair to summarize and clarify as needed.
4 Question Round	30 – 45 min	In a circle, each member can ask questions to gain understanding of the issue. No advice giving. Use the <b>Great Questions Guide</b> .
5 Experience Share	30 min	In a circle, each member can share a relevant experience. Refer to <b>Spark Kit – Dynamic Duo</b>
6 Reflect and Close	5 - 15min	The issue holder gets an opportunity to reflect and commit to next steps for accountability. Members can share their learnings as well, if time allows. See <b>PART II of Presentation Guide</b> .
7 Monthly Commitments	10 min	Each member shares an update on past commitment, and indicates what they are committed to for the following month. (See bottom of <b>Member Update Form</b> )

= approx 3.25 hours (ish) Meetings can range from 3 – 4 hours depending on Chapter size