

Creation of methodological guidelines

The methodological guidelines set out rules for the processing of processes, including a description of the organization, terms, responsibilities, responsibilities and powers in the individual work activities and relationships. The Methodology Directive should be part of the organization's routine activities and should be managed by individual consultants in each job position.

The methodological guidelines developed by an experienced employee when setting up an organization are a constantly changing set of rules, procedures and processes that have to be incorporated into the valid legislation under which the organization operates. It may happen that during the period of existence of the organization there will be some amendments to the individual laws, therefore these amendments should be incorporated in the valid directives at the time of their effectiveness. Well-developed methodological guidelines will make it easier for both external and internal control of process management to be facilitated by consultants, supervisors and headquarters ... for which the methodological guidelines are a sign of credibility and quality. The organization, through its directives, is interested in making the advice good, quality and effective. Practice is confirmed by the fact that when well-developed methodological guidelines are submitted to the counseling control, control is carried out much faster and smoother. The correct justification for the procedure chosen by the Directive can also prevent possible sanctions ... And how should such a directive look and what should it contain?

1. Legislation

Legislation sets out general rules only. These rules are implemented by the organization in its methodological guidelines, and in this way incorporates statutory regulations into specific conditions specific to the organizational unit.

2. Role of the methodological directive

Develop individual activities and processes of the organizational unit so that management relationships operate smoothly and have been named and given specific responsibility by the consultant.

Modify all organization activities in relation to legislation and define typical activities that are specific to the organizational unit.

Specify and define processes and procedures according to valid quality policies for each organizational unit.

3. Principles for creating and adjusting guidelines

The directive must be logical, clear, concise, the text must be clear and unambiguous.

The directive must address, name and characterize all the procedures defined, without undue repetition.

The Directive must contain the marking, the date of entry into force and the period of its validity.

The directive must be regularly updated according to legislative changes.

The directive should include a reference to the current software, literature, and other sources used.

The Directive requires a specific person responsible for its creation and updating.

When creating a directive, all legal, pedagogical and qualitative rules must be respected.

4. Names and numbering of the directive

Methodological guidelines can be called different names, and it is only up to the organizational unit what designation they choose. The organizational unit can choose between the following names:

- Directive
- Methodological guidelines
- Methodological manual
- Methodology
- ...

Whether an organizational unit chooses any name, it must be remembered that it is a binding standard in which the organizational unit determines the methods and procedures that must be followed during the counseling. If the organizational unit decides on the individual designation of its internal documents, it should continue with this label. Newly issued directives should be numbered in ascending order and should include the period and area to which they refer.

5. The requirements of the methodological directive

The development of methodological guidelines represents a rather extensive and time-consuming work. Therefore, cooperation with the supervisor is very appropriate. Each organizational unit has its own specificities, which must be considered when elaborating the methodological guidelines.

It is important to keep in mind the fact that there are quality standards in the organizational unit that have their own auditable regime. If so, then the organizational unit is obliged to follow these standards even when issuing and updating methodological guidelines.

5.1 Title of the Methodological Guideline

The organizational unit's methodological documents should maintain a uniform graphic layout, Header or headers. This information is necessary in order to avoid any challenge to the Directive, its validity or its effectiveness. At the same time, it also serves to identify the material that the directive describes.

The basic information that the header should contain:

- Name and seat of the organizational unit
- The title of the document and the unambiguous numerical designation

- Own title of the directive - identifying and resolving own content
- Approval

The information that is further suggested in the heading of the methodological guidelines is:

- Revision
- Efficiency
- Distributor
- Issued
- Attachments

Introductory provisions of the methodological directive

It usually contains references to the legal and professional regulations to which the directive is issued. It is appropriate that the Directive contains a citation of the relevant regulations. If quotes are contained in a methodological directive, individual counselors may not look for legal regulations.

Final provisions

- Liability for certain departments and counselors
- Validity and effectiveness
- Revocation - Lists the Directives which are repealed or amended by the adoption of this Directive; if only part is changed, this fact must be mentioned here
- Special assignment - here is defined who is required to check compliance with the Directive
- Provisions on annexes

5.2 Five methodological guidelines

It's as important as headers, but it's often considered superfluous

Basic data that the Fall should contain:

- Date and place of issue
- Changed pages
- The number of pages and a specific page number - they are among the indispensable data. E.g. the annexes to the Directive may contain extensive diagrams, without page number data, the parties may be easily confused.

5.3. Content of the Methodological Guide

The organizational unit sets out in its methodological guideline only those parts of the directive which are up to date and for which it has a specific content. We can say that the methodological directive can be divided into two groups:

I.

- Consultancy documentation system
- competencies and signatures
- timetables and plans
- archiving documents

II.

- methodical working materials - sheets
- training documentation
- auxiliary methodical materials and literature ...

6. Mistakes committed by the organizational unit when compiling methodological guidelines

Among the most common ones is that the organizational unit has no methodological guidelines at all, or has them, but not in the current state, they were created at the establishment of the organizational unit and were not updated over the whole period of existence.

formal shortcomings

- There is no unified nomenclature, and interpretation of concepts, obsolete concepts.
- Directives are not systematically and logically and clearly arranged.
- The guidelines should be brief, clear and concise; the requirement is not always respected.
- The Directive does not include entry into force, it is not the particular person responsible for creating and updating directives.
- The directive contains many abbreviations that are not properly explained in it, it also describes areas that are not present in the organizational unit
- The Directive does not cover the areas the organizational unit performs, Document archiving.
- The Directive is not regularly changed in the context of amendments to legal regulations.

7. Recommendations

Beyond the basics, it is advisable to incorporate other areas in the methodological guidelines. It depends on the size of each individual organizational unit. We can include in the methodological guideline, for example:

- internal unit regulations
- use of corporate motor vehicles (if not included in the travel directive)
- guidance on OSH and GDPR
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Each organizational unit must have its methodological guidelines in place to guide the process of counseling and its quality.

Guidelines for self-employed person

Self-employed persons, when conducting simple advice, should also have their methodological guidelines drawn up.

The methodological directive can be elaborated very briefly through points and the annexes to the individual points of the directive can be used.