Education

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Professional Learning Protocols:

Establishing Norms

**Goal:**This protocol is most effective at the beginning stages of team work, when establishing committees, when embarking on a project, and/or during any organizational transition. This process is also quite useful when revisiting and/or re-establishing ground rules and expectations for professional, respectful interactions and collaboration.

**Time required:** Varies; 30-60 minutes for each of 3 sessions.

**Materials:**Copies of the form(s) attached;chart paper (sticky kind is best) and markers for each sub-group

**Participants:** Invite a representative (or more) from each stakeholder group - in some cases, this might involve the entire stakeholder group

**Session 1**

**Step 1:** Discuss the importance of team norms **(“Norms are a set of agreements about how members will work with each other and how the team will work overall. These agreed-upon behaviors allow the team to increase its collective performance,” according to a Harvard Business Review article)**. Invite participants to reflect upon and share (as needed or desired) their experiences working within effective teams, on successful projects, in productive environments. Record and display the characteristics shared by participants in an anchor chart for ongoing reference throughout this process.

**Step 2:** Together, brainstorm a list of 5-6 Guiding Questions for the team to consider. To start, use the prompt, “How will we work together in order to maximize our success and strengthen our culture? What questions should we consider to build our behavioral agreements together?” (This can also be done individually and/or in smaller groups, with each person/group sharing their suggestions and a recorder posting them for all to see.)

**Step 3:** Repeat the process for the Agreements, answering the Guiding Questions posed above. Open the discussion to obtain clarity, to answer questions, to extract deeper meanings, and to allow for wordsmithing for precision. Allow participants to offer suggestions, pose questions, and engage in dialogue for a set period of time (example: 10 minutes of probing/clarifying questions with interactive discussion, followed by 5 minutes of reflection and suggested revisions).

**Step 4:** Let the participants know that these suggested Agreements will be posted (and/or electronically circulated) for all to consider until Session 2.

**\*Between Session 1 and Session 2**

Over the course of the next week or two, give stakeholders an opportunity to truly wrap their heads around the suggested Agreements, exchange preliminary thoughts, and prepare to engage in rich dialogue in Session 2. Invite participants to write their ideas on sticky-notes and post them on the chart paper, and/or use an interactive form online that participants can share their thoughts and questions with the team.

**Session 2**

**Step 5:**Bring participants together to share, in a free-flowing dialogue, any questions, concerns, ideas, personal anecdotes, hopes, and dreams that arise. If needed, pose discussion-starters such as, "Which of these norms is most important to you? Why?” and the original question, “How will we work together in order to maximize our success and strengthen our culture?” Set a time limit on this conversation and stick to it - this step is simply to get the creative juices flowing.

**Step 6:** Utilize a consensus-building process to identify the 2-3 Agreements (for each Guiding Question) that most aptly provide the necessary guidance for the team to work together.

**Step 7:**As the facilitator/leader, establish the understanding that the result of the consensus-building process has authentic power - it is the will of the team - and it now serves as the keystone for the Norms.

**\*Between Session 2 and Session 3**

Over the course of the next week or two, give stakeholders an opportunity to suggest specific behaviors that will define, describe, and reinforce the Agreements. Invite participants to write their ideas on sticky-notes and post them on the chart paper, and/or use an interactive form online that participants can share their thoughts and questions with the team.

**Session 3**

**Step 8:** Bring participants together to brainstorm, share, discuss, debate, and explore the specific behaviors that will support each of the Agreements. If needed, pose discussion-starters such as, “How will we act, precisely, to bring this Agreement to life?” and “What would this Agreement look like in action?” Set a time limit on this conversation and stick to it, recording additional thoughts and wordsmithing as necessary.

**Step 9:** Utilize a consensus-building process to identify the 2-3 Agreements (for each Guiding Question) that most aptly provide the necessary guidance for the team to work together.

**Step 10:**As the facilitator/leader, establish the understanding that the result of the consensus-building process has authentic power - it is the will of the team - and it now serves as the keystone for the Norms.

**Step 11:** Follow a formal process of setting the expectation that all participants will commit to this vision (even if the revised list does not contain any elements that a given individual participant voted for). \*You don’t need to sign and seal this document in blood; that’s just an expression that someone is bound to express. These norms can now serve as the basis of the team’s professional and personal interactions, can be held as expectations for professional conduct, and are reminders of all stakeholders’ commitment to collaborative success.

**\*Suggestion:** Revisit the norms often, perhaps even identifying a “norm of focus” for a specific meeting and/or set period of time, and engage in a discussion about how effectively the norm is producing the desired effect and/or how effectively the team is adhering to the norm. Adjust as needed.

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Professional Learning Protocols:

Worksheet: Operational Norms

**Goal:**Use this template to brainstorm and collect a set of agreements to guide how we will work together in all places, at all times, for all purposes…professionally and respectfully. Continue to list and describe behaviors that will support these norms. \*See sample in shaded box below:

**Guiding Question:** How will we resolve conflict?

**Agreements:** We will focus on the problem, not the person.

**Supportive Behaviors:** We will communicate our positions, opinions, and/or frustrations directly with each other (i.e. We will go to the source). We will endeavor to listen to and understand each other’s point of view. We will keep the “bigger picture” in mind as we discuss options. We will seek opportunities to compromise.

**Guiding Question:** How will we**…**

**Agreements:** We will**…**

**Supportive Behaviors:** We will**…**

We will…

We will…

**Guiding Question:** How will we**…**

**Agreements:** We will**…**

**Supportive Behaviors:** We will**…**

We will…

We will…

**Guiding Question:** How will we**…**

**Agreements:** We will**…**

**Supportive Behaviors:** We will**…**

We will…

We will…

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Professional Learning Protocols:

Worksheet: Meeting Norms

**Goal:**Use this template to brainstorm and collect a set of agreements to guide how we will work together in meetings and/or team work sessions…professionally and respectfully. Continue to list and describe behaviors that will support these norms. \*See sample in shaded box below:

**Guiding Question:** How will we build trust in each other?

**Agreements:** We will follow-through, matching our actions with our words.

**Supportive Behaviors:** We will adhere to established timelines. We will follow the actions plans we establish together. We will do what we say we’re going to do.

**Guiding Question:** How will we**…**

**Agreements:** We will**…**

**Supportive Behaviors:** We will**…**

We will…

We will…

**Guiding Question:** How will we**…**

**Agreements:** We will**…**

**Supportive Behaviors:** We will**…**

We will…

We will…

**Guiding Question:** How will we**…**

**Agreements:** We will**…**

**Supportive Behaviors:** We will**…**

We will…

We will…