Establishing Team Norms
ACTIVITY GUIDE WITH WORKSHEET

What You Need to Complete This Activity

- **A facilitator:** Anyone on the team can play this role by following the directions in the Activity Guide and Worksheet.

- **A worksheet note taker:** Anyone on the team may fulfill this role by capturing the team members' ideas throughout the discussion.

- **A copy of the worksheet** for each team member.

- **For teams meeting in person:** Five large sheets of papers for team members to write on.

- **For teams meeting virtually:** A word document or virtual whiteboard that all team members can view on the meeting platform.

Your team will need about 1 hour to complete this activity, followed by some time to share and distribute the norms to the team for feedback.

Activity Goal

Upon completing this activity and worksheet, your team will have an initial list of team norms or rules. Norms are a set of guidelines that a team establishes to shape the interaction of its members with one another. The team will work together to identify norms that reflect behaviors that foster a respectful and productive team culture for all members.

Who Should Participate and When?

This activity is best done by the entire team. Conducting the activity early in the team's formation is valuable. It is important that as many team members as possible—including researchers and stakeholders—be present and participate. It may also be useful to complete the Team-Building Activity Guide With Worksheet first so that team members can get to know each other.

Why This Matters

Establishing team norms can help team members get along and interact respectfully, which can promote success toward the team's goals. Agreeing upon team norms early in the study process recognizes team members' preferences for how to interact and gets team members' buy-in to the team's processes. Fostering mutual respect and buy-in can help engage and retain team members throughout the life of the study.

Step-by-Step Directions

1 **Agree to complete this activity and worksheet as a group, and schedule a time to work together.**

2 **If the team has not worked together before, introductions will allow each person to share why they are involved in the project.**

3 **Assign the roles of facilitator and note taker.** The facilitator and note taker should meet briefly to confirm what each will do during the meeting.

4 **The facilitator should start the activity by stating the team's interest in establishing team norms, reviewing the activity goal, and announcing the total time allotted for the activity.**

5 **The facilitator introduces the worksheet and states the time allotted for each step.** Step 1 is a team brainstorm and will take about 30 minutes. In Step 2, the full team will decide on team norms, which will take about 30 minutes.

Additional Guidance for the Facilitator

- It is possible that team members may not completely agree on which norms are best to adopt. It may be helpful to remind the team that differences and even disagreements can be productive, helping the team learn from each other and work together to develop more effective solutions. For guidance, see the Building Synergy Through Productive Disagreement webpage.

- In some cases, a personal conflict between team members may arise. In these rare cases, it may be necessary to meet with these team members outside of this activity to better understand and address the reasons behind the personal conflict (e.g., biases, different communication styles). For guidance, see the Negotiating Conflict webpage.

Worksheet
Section 1 • Group Brainstorm (30 minutes)

For teams meeting in person: The facilitator first explains the purpose of the activity; that is, to develop team norms or rules to guide how the team members will interact with one another. Then, the facilitator posts five large sheets of paper around the room, each sheet containing one of the questions below; shares the examples below to explain each question; and asks each team member to write their answers on each sheet of paper. The facilitator confirms that everyone has contributed and then asks team members to walk around the room to review the sheets of paper. The facilitator leads a discussion about common norms expressed for each question.

For teams meeting virtually: One at a time, the facilitator shares a question and several examples and invites team members to share their answers. Depending on the meeting platform, team members can either enter their answers into the chat for the note taker to cut and paste into a Word document that is then shared in Step 2 or team members can verbally share their answers as the note taker records their contributions on a virtual whiteboard screen. The facilitator leads a discussion about commonly endorsed answers to each question.

1. **What *overarching* norms are important to you when working on a team?**
   For example, all team members are equal; every team member's opinion will be thoughtfully considered; all team members agree that the team's established norms will guide their behavior on the team; team members agree to assess their own behavior as it pertains to the established norms; or team members agree to receive constructive feedback.

2. **What *communication* norms are important to you when working on a team?**
   For example, team members will speak *their* truth, will speak respectfully to each other, will not talk down to each other, will not interrupt, or will recognize and thank each other for their contributions.

3. **What *decision-making* norms are important to you when working on a team?**
   For example, team members will make decisions by consensus, but the majority will rule if a timely consensus can't be reached, or researchers and stakeholders will share decision-making authority.

4. **What *conflict resolution* norms are important to you when working on a team?**
   For example, conflicts will be resolved directly among team members; team members commit to view conflict as constructive and helpful, with the potential to lead to beneficial learning and change; or team members commit to listening to and seriously considering feedback without getting defensive, even when that feedback is hard to hear.

5. **What norms are important to you during meetings?**
   For example, team members will listen without interrupting; hold no side or competing conversations; attend meetings on time; end meetings on time; or work from an agenda.

   Note taker records a list of common norms either on a new sheet of paper if the team is meeting in person or through the chat or a shared virtual whiteboard.

Worksheet
Section 2 • Team Selects and Adopts Norms for Interaction (30 minutes)

Facilitator leads a team discussion with these questions:

1. **Based on what we learned about our team's preferred norms, which norms do the full team, or a majority of team members, share?**

2. **Are there any suggested norms individuals feel strongly about that weren't endorsed by a majority of the team?**

   a. Can the rest of the team agree to these norms?

   b. What compromises can be made?

Note taker captures key points of the team discussion and records norms the team has decided on, using either a shared Word document or a virtual whiteboard per Section 1. Facilitator shares final team norms back with the team, for example, by follow-up email, to guide team interactions going forward.