FACILITATE A GROUP NORM-SETTING PROCESS

Norms. (Audible groan acknowledged.) For some team leaders, collaboratively crafting a list of norms is a must-do, and for others, doing a dramatic group reading of the Pledge of Allegiance would seem like a better use of time. Understandably, norm setting can feel fruitless if you talk for 30 minutes, bicker over adjectives, and end up with a list of obvious agreements such as “Start and end on time.” Yes, a punctuality agreement is important, but this isn’t what skillful team leaders (STLs) are after when they engage groups in norming.

When facilitated well, a group norming process will engage people in honest discourse about behaviors that help and hinder the team. Discussion results in a short list of agreements that everyone can commit to. When the process is facilitated poorly, people spend a significant chunk of team time brainstorming about how they should interact, as if they’re in an alternate universe where nothing goes wrong. They fall into a black hole of wordsmithing a norm where they debate prepositions for 10 minutes until someone gives in. By the end of the meeting, the team comes away with either a succinct list that isn’t a true representation of the voices in the room or a much-too-long set of agreements that no one will remember, let alone follow. Either way, the time-consuming process results in a meaningless list that has no influence over how people really work together in meetings. STLs intentionally choose and facilitate a norm-setting method that establishes expectations for how people will actually work together on a team.

There are many ways to facilitate an authentic group norm-setting process. In the next few pages, I offer three specific methods, outlined in Figure 7. Choose to use what best fits your team.

**STL moves:**

2.1 Co-construct norms through consensus.

2.2 Save time with starter norms.

2.3 Promote mindfulness with personal norms.

**Tools and templates:**

Figure 7: Norm-Setting Process Comparison Chart

Figure 8: STL Personal Norming Tool
What these moves promote:

*Clarity.* All team members know from the start what behaviors are expected of them during collaboration.

*Self-awareness.* People are called upon to notice the ways in which their behaviors help and hinder the team.

What to call norms:

If you have a team that has had a negative experience with setting norms, change the term. More favorable options include *group agreements, working agreements, rules of engagement, team expectations, social contracts,* and *team pacts.*

When to introduce norms:

When people come together, particularly for the first time, they want to launch into the important work they came together to do, not wordsmith a list of rules they must agree to. Create a need for norms after you have set an initial direction for your team. It might even be in the second or third meeting after you have had time to work together. Once group members figure out what they are trying to accomplish and why, they will be ready to set agreements for working to accomplish these goals.

Whom to create norms for:

You might think teams that know each other well and have worked together before can skip norming, but actually the opposite is more often true. When a group is forming, people are more careful and conscientious of how their words and actions affect others. But once people get comfortable and familiar with each other, the line of what’s acceptable can get blurry. (An extreme example: I was in a group where a colleague cut his fingernails at the meeting. Really.) Although you may not encounter that type of “anything goes” behavior, collegiality can hold a team back. Agreeing to ways in which people collaborate can help a team of friends maintain a level of professionalism needed to work well together and engage in impactful discourse.

STL recommendations for any norm-setting process:

*Write with action verbs.* English teachers know to steer clear of passive verbs. I know you are not writing a paper, but norms are much easier to uphold when they are written as directives that you can keep one another accountable for. Frame your agreements using action verbs. Replace passive verbs such as *be* with small specific actions that people can do. For instance, “Don’t be defensive” becomes “Hear what’s hard.” “Be solutions-oriented” becomes “Offer at least one solution.” “Be prepared” could become a more specific actionable norm such as “Prep your data.” Changing from passive to active verbs might seem nitpicky, but
people actually appreciate having actionable agreements as they provide clarity for what is expected.

*Extend your list with school-wide norms.* Work with school leaders to establish school-wide norms that educators on all teams are expected to uphold. This cuts back on the agreements you need to make as a team, leaving room on your list for what’s most important to your group. (For instance, starting and ending meetings on time should be a school-wide norm.)

### FIGURE 7 Norm-Setting Process Comparison Chart

<table>
<thead>
<tr>
<th>PROCESS</th>
<th>BENEFITS</th>
<th>CHALLENGES</th>
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| Co-construct norms through consensus. | • Everyone in the group is given an opportunity to speak.  
• The team feels ownership for norms.  
• Everyone has a shared understanding of the agreed-upon norms. | • The process is time-consuming. Depending on the size of the group, it may take up to 45 minutes.  
• Social influences (explored in Part II, Chapter 4) can affect how people participate. This can result in a watered-down list of agreements that holds little meaning for the group, presenting challenges once collaboration is underway. |
| Save time with starter norms. | • The process is efficient.  
• The process establishes group agreements without disrupting momentum for the work the team is doing.  
• People who have had negative experiences with group norm setting appreciate the approach.  
• Essential, customized norms are selected. | • There’s little to no input from team members, which can cause some people to feel a lack of ownership over the list of agreements. |
| Promote mindfulness with personal norms. | • People are deeply invested in their personal norm.  
• The process is efficient because the team does not need to spend time reaching consensus. All norms are accepted.  
• People become mindful of their own behaviors in a team. | • The process is short but requires homework in between meetings.  
• The process demands self-awareness and vulnerability. |
2.1 **Co-construct norms through consensus.**

If you want norms to stick, involve the people who are expected to follow them in the process of writing them. Build ownership by co-constructing norms. The goal of this approach is to generate many ideas for group agreements, narrow down the choices, and, through consensus, arrive at a few to adopt. Consensus (explored in detail in Move 8.16) does not mean coming to a unanimous decision, and it doesn’t mean majority rule wins. It’s about collecting information, formulating ideas, listening to and discussing options, and ultimately coming to decisions everyone on the team can live with, even if only temporarily (Massachusetts Institute of Technology, n.d.). Skillful team leaders (STLs) co-construct norms through consensus.

**How to co-construct norms through consensus:**

Follow this four-step protocol:

1. **Brainstorm challenging behaviors.** Invite colleagues to generate behaviors that they don’t want to see on their team—things that really irk them, pet peeves, and behaviors that hinder the function and impact of a team. Write one per sticky note.

2. **Do a quick sort.** Brainstorming leaves you with an endless list of possibilities. To derive meaning from the list and focus the group on the task at hand, quickly sort ideas into categories. Ask your team or small groups to silently cluster the “pet peeve” sticky notes into five piles by common theme. Put any note that doesn’t seem to have a place to the side. Discuss the piles made and title each pile.

3. **Reframe with positive language.** You are more likely to get people to keep norms if you write them as things they should do, as opposed to things they shouldn’t do. Turn your categories into positively worded agreements.

4. **Reach consensus.** Read through your list of positively worded norms and confirm that everyone in the group can “live” by these agreements.

**In action:**

Kyle:  Let’s begin by thinking about the behaviors that might get in the way of our collaboration. What peeves you? Pick something important, but don’t write about any specific person. [*Kyle passes out sticky notes.*] . . . Looks like everyone has independently written at least three pet peeve sticky notes by now. Let’s put them all out on the table, read through them silently, and begin to move them around to make piles according to common themes. Let’s group the following sticky notes together—“people off-task,” “side conversations,” “grading papers,” and “answering email”—and name the category *Distractions.* . . . Let’s set an actionable positive norm to address distracting behaviors:
“Fully engage throughout the meeting.” . . . Is there anyone who can’t live with this agreement? Okay. Let’s set the other agreements.

**STL recommendations:**

*Break up.* Large teams may need to split into small groups for brainstorming and quick sort. Bring them back together when narrowing down to five piles and reframing in positive language.

*Set parameters.* Brainstorming the negative can turn into a blame game unless there are guardrails in place for the conversation. Explain from the start that no one should describe specific people or incidents.

*Be careful of compromise.* Consensus is not compromise. Bargaining in ways such as “I’ll give up the confidentiality norm if you let us keep the evidence-based decision-making norm” leads to people advocating or disagreeing until someone who doesn’t want to debate any longer gives in. If you are stuck reaching agreement, keep both norms.

*Start with the ideal.* Often when teams set norms through consensus, they brainstorm a list of desirable behaviors. Although this positive slant helps people envision how they aspire to collaborate, it doesn’t always get real in the way that a norm-setting process needs to. This is why I recommend starting with the challenges. However, if you fear this approach will spiral your group into a negative tailspin, then brainstorm the ideal and move to categorizing and choosing up to five norms that you aspire to keep.

**Find the right words:**

Brainstorm challenging behaviors.

- What irks you in a team meeting?
- What hinders your engagement in a meeting?
- What hinders your ability to learn?

Quick sort.

- Arrange sticky notes into five or fewer categories.

- If you have more than five categories: Let’s set aside the challenges that should be addressed with school-wide norms, as well as any challenges that may be obvious things we want to avoid. Let’s keep the piles that address the behaviors that could really hinder our team and come up with norms for those.

Reframe with positive language.

- If we were to reframe that as a positive agreement, it might sound like . . .

Reach consensus.

- Is there anyone who cannot live with these group agreements?
Related reading:

Move 5.16, “Synthesize ideas.” When you have too long a list of norms, turn to this move to lift up and put together ideas.

Move 8.16, “Reach agreement on group decisions.” Find consensus-building moves here.

2.2 Save time with starter norms.

When time is limited but you still want to set behavioral expectations for your meetings, starter norms are the way to go. They are a quick method to establish initial ways of working together. It’s not a move for leaders who want to facilitate thoughtful discussion around behaviors that hinder a team, but it is an efficient means to set some ground rules upfront. Skillful team leaders (STLs) propose norms for people to follow.

How to save time with starter norms:

Follow this three-step protocol:

1. Curate. You likely have a sense of where the wheels could fall off with the team that you are about to lead. Before your team meets, decide on three to five agreements you want to adopt at the start. Think about agreements in such categories as productivity, confidentiality, decision making, participation and engagement, technology, conflict resolution, and implementation.

2. Check for understanding. Have you ever been in a circumstance in which you thought you agreed to one thing until someone else said, “I thought we agreed to something different”? Check that everyone has the same understanding of what they are agreeing to. Read aloud your starter norms, give a brief context as to what they mean if any need defining, and explain why you are proposing each one. Give people an opportunity to discuss what the norm will look like in practice.

3. Gain commitment through consensus. As with any norming method, you’ll want commitment from everyone on your team to uphold the agreements you set. Get people to agree to “live with” the list for now, and inform them that they will have multiple opportunities to revisit and change norms going forward.

In action:

Maya convenes a district-wide content team that will meet only a few times throughout the year.
Maya: We are lucky to come from different schools and hold different perspectives. Because of this I’d like to propose that we make it the norm to invite multiple perspectives. Putting this norm into practice means being mindful of when to advocate and when to actively seek others’ opinions. Can we commit to upholding this for now?

STL recommendations:

Talk less, listen more. Keep explanations short and dedicate more time to discussing understanding.

Go hybrid. For people who want to contribute to group agreements, propose three starter norms that you feel are essential for the team, and invite anyone who’s interested to propose up to two more if they feel the list is insufficient.

Find the right words:

- I’m proposing this first set of group agreements. After we’ve worked together for a little longer, we can revisit and revise. Which of these norms need clarification? Is there anyone here who can’t commit to this list for now?

2.3 Promote mindfulness with personal norms.

In my theater days, a director once told me that actors must avoid bringing their own mannerisms—or -isms, as he liked to call them—to the stage. These are the default patterns of behavior that we do without even being aware of them. For instance, an actress might play with her hair out of habit, even when the character she is playing wouldn’t do that. (Evidently, my acting “Elisa-ism” was touching my neck in scenes.) You don’t have to be an actor to have an -ism. We have been working in teams since a very young age, and these early experiences, together with ones from adulthood, have cemented some less-than-great habits. While others may learn to tolerate our quirks, some of our behaviors may be debilitating to a team and need to be normed. It’s not until we become aware of our -isms that we can consciously work to rid ourselves of them.

Traditional consensus-building models for writing team norms do not always produce agreements that break us of our habitualized patterns of behavior that hinder collaboration. Some skillful team leaders (STLs) lead a more reflective approach—personal norm setting.

How to promote mindfulness with personal norms:

Follow this three-step protocol:

1. Notice how you show up in meetings. Invite your colleagues to observe and reflect on their own helping and hindering behaviors when they participate
in team meetings. (If self-reflection is challenging, they can ask a trusted friend to give them feedback.)

2. **Name assets.** To keep the tone positive, capitalize on the good. Recognize the strengths that people bring. Invite colleagues to write one positive attribute about every member of the team, or to name their own superpower when working in groups (e.g., “I’m good at synthesizing ideas”). Either of these exercises might initially make people self-conscious, but once people begin sharing, the group will see how strong they can be if they take advantage of these assets.

3. **Set personal goals.** Instruct your colleagues to choose one behavior that they wish to change about themselves—something that they see hinders the function and/or impact of their team. (Figure 8 can be useful.) If needed, reframe the problematic behavior as a positive, actionable norm. Key point: This is not a consensus approach; all personal norms are accepted.

**In action:**

*The following are three examples of individuals coming to their own personal norms.*

**Neil:**

(Helpful behavior) I capture written notes in a meeting with appropriate detail.

(Hindering behavior) I have noticed that I tend to “wing it” in other team meetings, attending them unprepared.

(Personal norm) I commit to carving out a consistent time to review materials before these meetings.

**Callie:**

(Helpful behavior) I am evidence-based when analyzing data.

(Hindering behavior) I process out loud and tend to voice my ideas in meetings as soon as I have one. I’ve noticed this doesn’t leave much space for others to talk. I think I may need to hold back a bit.

(Personal norm) I commit to inviting others to talk.

**Paul:**

(Helpful behavior) I always follow through with tasks after a meeting.

(Hindering behavior) A colleague told me that he noticed I tend to get swept away by discussion ideas, which can distract our team from what we are trying to accomplish.

(Personal norm) I commit to contributing in ways that bring the team closer to the meeting’s intended outcomes.
FIGURE 8  STL Personal Norming Tool

Directions: Use the left-hand column to identify any behaviors you exhibit when collaborating on other teams. Then look to the right-hand column for ideas you might consider adopting as your personal norm for your work with this team.

<table>
<thead>
<tr>
<th>BEHAVIORS THAT HINDER FUNCTION AND IMPACT:</th>
<th>NORMS THAT IMPROVE FUNCTION AND IMPACT:</th>
</tr>
</thead>
<tbody>
<tr>
<td>I voice my thinking more than others on the team.</td>
<td>Invite others to speak.</td>
</tr>
<tr>
<td>I process externally, speaking up often.</td>
<td>Pause and listen.</td>
</tr>
<tr>
<td>I express my ideas more than others.</td>
<td>Participate intentionally—know when to step up and step down.</td>
</tr>
<tr>
<td>I voice my thinking less than others on the team.</td>
<td>Participate intentionally—know when to step up and step down.</td>
</tr>
<tr>
<td>I process internally, taking time to speak up.</td>
<td>Privately jot down my thinking and then share out one idea.</td>
</tr>
<tr>
<td>I rely more on others for ideas.</td>
<td></td>
</tr>
<tr>
<td>I lean toward my own perspective and ideas.</td>
<td>Solicit alternative viewpoints.</td>
</tr>
<tr>
<td>I have trouble listening to perspectives different from my own.</td>
<td>Encourage pushback on my ideas.</td>
</tr>
<tr>
<td>I tend to advocate for my ideas before hearing others.</td>
<td>Seek first to understand and then to be understood.</td>
</tr>
<tr>
<td></td>
<td>Hear what’s hard.</td>
</tr>
<tr>
<td></td>
<td>Listen to learn.</td>
</tr>
<tr>
<td>I take things personally.</td>
<td>Respond more than react.</td>
</tr>
<tr>
<td></td>
<td>Pause and ask, “What is another way to interpret this?”</td>
</tr>
<tr>
<td>I voice objections and struggle to move past them.</td>
<td>Strike positive.</td>
</tr>
<tr>
<td>I question people’s motives.</td>
<td>Find the good and praise it.</td>
</tr>
<tr>
<td></td>
<td>Assume positive intentions.</td>
</tr>
<tr>
<td>I rarely voice objections.</td>
<td>Solicit alternative viewpoints.</td>
</tr>
<tr>
<td>I hold back to steer away from conflict.</td>
<td>Encourage pushback on my ideas.</td>
</tr>
<tr>
<td>I get distracted or tune out.</td>
<td>Be present and focused.</td>
</tr>
<tr>
<td></td>
<td>Only use technology to support my learning and participation.</td>
</tr>
<tr>
<td>I inconsistently follow through.</td>
<td>Anticipate obstacles and plan with others how to overcome them.</td>
</tr>
<tr>
<td></td>
<td>Commit to action.</td>
</tr>
<tr>
<td>I do not consistently come prepared to meetings.</td>
<td>Be reliable.</td>
</tr>
<tr>
<td>I offer observations based on opinion more often than on evidence.</td>
<td>Annotate data documents with observations before participating.</td>
</tr>
<tr>
<td>I permit my bias to influence my inferences about data and/or view of what is possible.</td>
<td>Make evidence-based observations.</td>
</tr>
<tr>
<td></td>
<td>Use the words not yet when speaking about students’ deficits.</td>
</tr>
<tr>
<td>I frequently get the team off-track from the agenda.</td>
<td>Contribute in ways that move the team toward intended outcomes.</td>
</tr>
</tbody>
</table>
In action:

Anna: The next time you are in any meeting, take note of the ways in which your participation helps the group, and the ways in which it doesn’t. Jot down your observations and bring them to our next meeting. You could also ask a trusted colleague to give you feedback on how they see you as an asset to a team and behaviors that you might consider working on. . . . [Next meeting.] As we decide the ways in which we want to work together, let’s share one superpower—a special quality that each of us brings to a team. I’ll start. It feels weird to tell you all that I’m really good at keeping people on task, but I am. If our conversation starts to wander off the agenda to nowhere land, I’ll bring us back.

Teacher 1: I’ll go. I’m awesome at thinking like a kid. [The team laughs.] Whenever I’m with a group and we are looking at student work and no one can figure out what the student was thinking, somehow I can.

Teacher 2: I might have trouble naming my own, but I can say that [Teacher 3] is incredible at bringing a sense of calm to any crisis.

Teacher 3: Thanks. And I think you are great at envisioning what could be, and telling it in a way that others can see, too.

Anna: These strengths are important. Let’s all commit to using our “superpowers” at each meeting. . . . Now, what about the things we do that hinder collaboration? What do you want to change? For instance, I’ve been told that I talk . . . a lot. I think I’m just one of those people who processes aloud, but I realize that doesn’t leave a lot of space for others to talk. I am setting the personal norm to invite others to speak. To put that norm in action right now . . . Mara, I invite you to share your personal norm. [People laugh.]

Mara: Well, I might have been a bit hard on myself and came up with a bunch of things to work on, but then I talked to my supervisor and realized this personal norm could fit in with what we identified in my teacher evaluation goal. Essentially, I need to be more evidence-based. My personal norm is to stop making assumptions.

Anna: That is such an important area to work on. To make that positive and actionable, you could agree to Draw conclusions from evidence. Does that capture it?
**STL recommendations:**

*Do field research.* One New Year, a friend convinced me to take on a cleaning organization challenge, and the first assignment was to tackle my fridge. I thought to myself, “I know I’m not the cleanest person, but my fridge is fine.” Once I started cleaning it out, however, I was shocked at what I actually had in there (and, if I’m being honest, how gross my shelves really were). I bring this up because if I had been asked to simply sit and self-reflect on what areas needed work in my kitchen, I would not have named my refrigerator. It took the act of intentionally addressing it for me to see that this was a trouble spot.

The behaviors we exhibit in meetings can resemble that grime in the veggie drawer that we’ve stopped noticing. Successful norm building requires bringing awareness to our behavior. Rather than asking people to sit quietly and think about how they act in meetings, invite your colleagues to actually do some field research in which they notice and keep records of their behaviors when collaborating on teams.

*Partner up.* Invite team members to partner with one person at the table during the share-out. This can lower anxiety for people who are nervous about publicly naming their personal norms to the whole team.

*Let it be.* It might happen that someone on your team will set a personal norm that you and your colleagues feel isn’t *the* thing that person needs to work on. There are some people who are either less aware of their own hindering behaviors or aware but not yet ready to tackle those behaviors publicly. (It’s not easy to admit “I gossip about my colleagues and want to stop.”) Trust that the person selected a norm that is meaningful to them, and at a later date, you can invite people to revisit and revise their personal norms.

*Add on personal norms.* Ask people to adopt one personal norm in addition to a short list of essential norms that every team needs. For example, “We will start and end all meetings on time, agree to disagree without being disagreeable, and uphold our own personal norms.”

**Think like a teacher:**

Mindfulness has become regular practice in schools. When students become mindful of their behavior, they can actually begin to choose how they want to show up as learners. I remember working with a middle school student to help him curb his blurtling out in class. Although this behavior was obvious to me and the other students because it was disruptive to their learning, the child was often not aware that he was doing it. He and I came up with a secret hand signal that I could use to help bring awareness to his blurtling-out behavior without embarrassing him in front of the class. We set the intention for him to actively participate in ways that did not involve his voice, such as writing responses on a small whiteboard at his desk, and I agreed to walk by him frequently to see what he wrote and give him acknowledgement. None of these techniques
eliminated his disruptive behavior, but they did improve his self-awareness enough to reduce it, which helped him and others participate better in the learning. In essence, what this student and I did was set a personal norm for him and give him the means to successfully uphold it.

You do not need to support educators on your teams as much as I did with my student, but the act of setting personal norms can empower people to show up to meetings as their best selves.

**Find the right words:**

- **Between now and the next time we meet, be mindful of how you show up in other team meetings or collaborative settings.** Make note of what you do that helps the team and what behaviors might hinder the team’s collaboration. If helpful, ask a friend who will tell it to you straight what they see as the strengths you bring to team discourse and where they see you need to improve.

- **What behavior do you exhibit that helps your team get along [function] or achieve its goals [impact]?** Put another way, if someone came up to you at the end of a team meeting and said, “Wow, you are really good at X in our meetings,” what would X be?

- **If you have ever left a meeting disappointed in yourself and thought, “I really wish I didn’t Y in that meeting,” what would Y be?”**