



Create Shared Agreements

Authored by Christine Jackson & Leah Peña Teeters

Activity Rationale and Aims

Aims

01. To establish together a set of shared agreements to guide participation and collaboration

Rationale

Establishing shared agreements for collaborative work supports teams to come together to discuss proactively how to best work together. The group can share ideas about how to collaborate and interact with each other. If and when challenging moments arise, shared agreements that were previously negotiated can help the team to navigate their interactions in ways that honor the perspectives of all collaborators.

Activity Summary

This activity results in collective agreements with regard to how the group will engage with each other. These established group agreements will help guide collaboration throughout the duration of the project, and will be regularly revisited for revision, expansion, and use.



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In Person Steps

As a whole group:

1. Facilitator introduces the concept of shared agreements and why they are important.
 - a. *Beginning with developing shared agreements creates clarity around values and expectations, and sets the stage for a collaborative environment that is grounded in respect and equity. Shared agreements also support the team to navigate challenges and disagreements.*
2. Invite the group members to reflect independently on the group agreements they would like to propose. As they generate agreements, ask them to write them down on sticky notes. Facilitators should also participate in this part of the activity with all other group members.
3. Ask each person to share out their sticky notes and put them on the board/wall. As someone reads one that is connected to another person's idea, have them go up and add their sticky note in clusters.
4. After all sticky notes have been added, review the clusters, identify key themes, and write the themes above each cluster.
5. Add these to a condensed list on a separate paper/board.
6. Review the condensed list and discuss examples of what the agreement looks like in practice.
7. Revisit agreements at the start of the next meeting so that team members can have a chance to reflect over time and then revisit the agreements.
8. Make a plan to revisit the agreements regularly (ideally in every meeting). Determine a frequency that makes sense for your group and collectively decide how you want to revisit the agreements. Some ideas on how to revisit the agreements regularly are:
 - a. At the start of each meeting, have each team member read one agreement until the whole list is read.
 - b. Have one person assigned to read all the agreements and have that person rotate each meeting.
 - c. Ask for one team member to volunteer to read one agreement at the start of each meeting.

Modifications and Virtual Adaptations

- If adapting this activity for a virtual environment, use a shared document, Jamboard, or other collaborative technology to add and share agreements.



Facilitator Preparation

IN PERSON MATERIALS

- Powerpoint or large paper
- Sticky notes
- Butcher paper or extra large sticky notes
- Markers

HANDOUTS

- Finalized group agreements

DIGITAL HANDOUTS

- A shared document or Jamboard for the agreements and any additional group notes

Facilitation Tips

- It may be helpful for the facilitator to consider some example agreements prior to the meeting, such as:
 - Encourage multilingualism
 - Make space for everyone to participate
 - Be present and minimize distractions
- The facilitator and group members should practice validating, encouraging, admiring, and appreciating what each person brings to the group.
- Allow adequate time for people to reflect on the group agreements before asking for modifications, additions, or changes.
- Make sure every person has the opportunity to speak and to be heard. It is especially important to model this in the first meeting for all future meetings.
- It is necessary to reach consensus on the group agreements. All dissenting opinions should be heard, considered, validated, and worked through collectively. This activity can be extended for as much time as needed to reach consensus.
- At the beginning of each meeting moving forward, include a link or visual posting to the group agreements in the meeting agenda so they can be read, revised, or expanded upon as needed.
- It may be helpful to implement this activity alongside a consideration of the guidelines outlined in the tool [“Guidelines to Support the Cultivation of Trust.”](#)



Example from the field

In an on-going collaboration between researchers, practitioners, and students, the group developed shared agreements at the start of the collaboration. These agreements were returned to at the start of regular meetings and revised and expanded as the collaboration progressed. One of the shared agreements was “lean-in, lean-out.” This agreement encouraged all collaborators to share the air and speak up when they were being less vocal (lean-in) and make space for others (lean-out) when they noticed that they were being more vocal.

In the context of a multi-day design intensive, one collaborator was very vocal and engaged in the conversation and

direction of design. While the collaborator’s enthusiasm was appreciated, it prevented other members from sharing their views and opinions. The facilitator noticed this pattern emerging in the meeting and invited the group to pause after a break to review the agreements. They read them all, and paused to discuss “lean in/lean out” in a bit more depth. This break served the purpose of re-centering the group around their shared agreements, after which the student was more intentional about pausing to speak until others had also contributed. This example illustrates how returning to shared agreements in the moment and in the midst of the work can be a powerful way to keep the values centered and the work on track.

Commitments to Equity and Wellness

Creating and revisiting shared agreements allows us to hold ourselves accountable and proactively seek to establish shared processes and commitments of collaboration. Generating shared agreements can help teams mitigate challenging situations, as well as to navigate them if and when they arise. Adhering to and revisiting shared agreements brings forward group’s intentions and keeps work person-centered.



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Additional Reading

Postmes, T., Spears, R., & Cihangir, S. (2001). Quality of decision making and group norms. *Journal of Personality and Social Psychology, 80*(6), 918–930.



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