**Work(place) Evolution**

*Hybrid Work & Communication Toolkit*

**Team Norms Discussion**

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# Completing the Team Norms Checklist

## **How to approach the Checklist**

The purpose of the Checklist is to reinforce your team norms relating to hybrid working. It invites your team to generate explicit Team Norms to set, socialize, and update over time.

As with all the other materials in this toolkit, there is no right or wrong way to use the Team Norms Checklist. We encourage you to draw directly from your team’s existing norms and culture. If your team conducted the Team Norms Discussion, there will be a lot of rich material you can draw from to build your Checklist. You can also see if there are any items in the template that your team had not considered or could complement what you put together.

You may also need to consider how the norms you have discussed apply to your team and to people you collaborate with beyond your team. You may wish to create separate Checklists, or sections within your Checklist, that address norms around other groups that you work with.

For example, consider these two types of teams and how their Checklists might be unique:

* A service-oriented team: The people on this team share a set of specific skills and competencies, but their day-to-day work is in service to other projects or teams. The people on this team may have an internal team culture, team meetings, and reasons to collaborate internally, but the bulk of their day-to-day interactions are with people outside their team. How might they want to differentiate between internal team norms and norms they want to establish or model when working with other teams?
* A leadership team: The people on this team may have to tackle joint projects and collaborate with each other, but they each manage their own teams, each with unique cultures and norms. The managers on this team may want to establish a set of norms with their direct reports that affects their day-to-day interactions internal to their small team, but they may also want a separate set of overarching norms that apply across all the managers and their respective teams.

What makes your team unique and how might you need to or want to structure your Checklist to support and reinforce norms across the different people you work with?

If you have questions, concerns, or feedback about this Toolkit or about any of the information and materials we have provided, please contact [FoM.OrgDev@ubc.ca](mailto:FoM.OrgDev@ubc.ca?subject=Question%20about%20the%20Hybrid%20Work%20&%20Communication%20Guide).

## **Contents**

There are two versions of the Checklist you can choose to build from and an additional ideas bank that you can draw ideas from:

## **1. Pre-Populated Checklist**

*A comprehensive list of pre-populated considerations for your team. This version is designed to capture many of the key questions and concerns teams have about how to be effective in a hybrid work environment. This Checklist may be sufficient as an off-the-shelf tool for many teams.*

## **2. Blank DIY Checklist**

*This is a completely blank template which you can use to enter your own Checklist items.*

## **3. Ideas Bank**

*This is a list of other checklist items that you could consider if the ones in the first template are insufficient or irrelevant.*

## **How to construct your Checklist**

### **As a group:**

Look back at the notes and ideas you generated during the Team Norms Discussion. Take those ideas and group them into categories (e.g. Meeting hygiene, Activities when onsite, Activities when working remotely, etc.) and build your own Team Norms Checklist. You can draw on the ‘ideas bank’ to see if there are any other considerations that did not come up in your Team Norms Discussion that you want to add.

### **Consolidate and revisit:**

You, or a volunteer from your team, can take away the notes you captured during your Team Norms Discussion and synthesize them into a Checklist. Schedule time in your next team meeting or a specific block of time to review the Checklist they put together and make any changes that may be necessary. You can draw on the ‘ideas bank’ to see if there are any other considerations that did not come up in your Team Norms Discussion that you want to add.

### **Homework:**

Ask each person from your team to take the Checklist away to complete on their own as ‘homework’. Schedule time in your next team meeting or a specific block of time to compare each of your Checklists to come up with a single Checklist for your whole team. You can draw on the ‘ideas bank’ to see if there are any other considerations that did not come up in your Team Norms Discussion that you want to add.

# **Team Norms Checklist [Pre-Populated]**

**Meetings**

* + No meetings before: \_\_\_am or after: \_\_\_pm
  + No meetings on: \_\_\_days or during lunch [e.g. 12:00-1:00 pm]: yes / no
  + Our standing team meeting will be on: \_\_\_day at \_:\_ am / pm
  + Our standing team meeting will be: hybrid / online / in-person and located: \_\_\_\_\_
  + We will build time for rest and wellness between meetings by: \_\_\_\_\_ (e.g. start meetings 5 or 10 minutes after the hour, or end meetings 5 or 10 minutes before the hour)
  + Our preferred hybrid/remote meeting video settings are: \_\_\_\_\_ (camera off / on)
  + We will strive to start and end all meetings on time to mitigate meeting fatigue and prioritize wellness: yes / no
  + All meetings must have a clear objective and agenda: yes / no This will be communicated by: \_\_\_\_\_ (e.g. Including this information in the meeting invitation and calendar invite)

**Working Location and Activities**

* + Our ‘anchor day(s)’ for being in the office will be: \_\_days (e.g. Mondays and Wednesdays)
  + We will prioritize the following activities for in-office days: \_\_\_\_\_ (e.g. no meetings; eat lunch together; go for a walk; socializing as a team)
  + We will prioritize these activities for remote work days: \_\_\_\_\_ (e.g. focus time; meetings)
  + We will enable informal team and culture building and socializing by: \_\_\_\_\_ (e.g. monthly
  + We will stay connected when working remotely by: \_\_\_\_\_ (e.g. creating a separate MS Teams channel for informal conversation; holding regular informal check-ins to connect)

**Communication Tools**

* + Our primary tool to communicate is: MS Teams / Slack / Other: \_\_\_\_\_
  + We prefer emails or phone calls rather than [Zoom] in instances such as: \_\_\_\_\_
  + We will communicate that we’re in ‘Focus Mode’ by: Blocking Calendars / Status / Other
  + We will respect our colleagues’ focus time / Avoid messaging when team member is 'busy' by: \_\_\_\_\_ (e.g. paying attention to busy/free indicators on MS Teams; checking their calendar to see when they might have some free time before requesting a meeting)
  + We will share our work location / hours by: \_\_\_\_\_ (e.g. using our MS Teams status; using a shared team calendar)
  + In general, our preferred use of the following communication tools is for:
    - Email: \_\_\_\_\_ (e.g. meeting requests; non-urgent questions; calling in sick)
    - MS Teams chat message: \_\_\_\_\_ (e.g. quick / urgent questions; casual conversation)
    - Zoom / MS Teams video call: \_\_\_\_\_ (e.g. work / brainstorming meetings)
    - Phone/Text: \_\_\_\_\_ (e.g. very urgent questions)

**What else?**

* + Are there any tasks that are redundant or behaviors that we should stop doing?: \_\_\_\_\_
  + If we have additional questions or feedback about this plan, we will: \_\_\_\_\_

**Application**

* + These norms were completed on: DD/MM/YY and we’ll revisit them on: DD/MM/YY

# **Team Norms Checklist** [DIY]

**Meetings**

* + [ *Add Meetings question here* ] : [ *answer* ]
  + [ *Add Meetings question here* ] : [ *answer* ]
  + [ *Add Meetings question here* ] : [ *answer* ]
  + [ *Add Meetings question here* ] : [ *answer* ]
  + [ *Add Meetings question here* ] : [ *answer* ]

**Workspace**

* + [ *Add Workspace question here* ] : [ *answer* ]
  + [ *Add Workspace question here* ] : [ *answer* ]
  + [ *Add Workspace question here* ] : [ *answer* ]
  + [ *Add Workspace question here* ] : [ *answer* ]
  + [ *Add Workspace question here* ] : [ *answer* ]

**Communication Tools**

* + [ *Add Communication question here* ] : [ *answer* ]
  + [ *Add Communication question here* ] : [ *answer* ]
  + [ *Add Communication question here* ] : [ *answer* ]
  + [ *Add Communication question here* ] : [ *answer* ]
  + [ *Add Communication question here* ] : [ *answer* ]

**Other**

* + [ *Add Other question here* ] : [ *answer* ]
  + [ *Add Other question here* ] : [ *answer* ]
  + [ *Add Other question here* ] : [ *answer* ]
  + [ *Add Other question here* ] : [ *answer* ]
  + [ *Add Other question here* ] : [ *answer* ]

# **Ideas Bank**

**Meetings**

* + Everyone on our team works Mon – Fri: yes / no
  + We will adjust our calendar settings to “visible” for transparency & scheduling: yes / no
  + These are the days / weeks we’ll set as “recharge” or “quiet” weeks, with fewer/no meetings: \_\_\_\_\_

**Team Building / Team Culture**

* + We’ll showcase our work and share appreciation for our team by: \_\_\_\_\_ (e.g. making time at team meetings; during our annual team retreat)
  + We’ll celebrate events (birthdays, new semesters, etc.) by: \_\_\_\_\_ (e.g. getting a card; going out for a team lunch; meeting after work for drinks)
  + We’ll celebrate the arrival of new team members by: \_\_\_\_\_ (e.g. making an effort to be in the office to welcome them; going out for a team lunch; meeting after work for drinks)
  + We’ll say farewell to departing team members by: \_\_\_\_\_ (e.g. getting a card / gift / flowers; going out for a team lunch; meeting after work for drinks)

**Communication Tools**

* + After [ primary tool ] our secondary tool to communicate is: \_\_\_\_\_
  + We will use [ secondary tool ] specifically to communicate in this way: \_\_\_\_\_
  + We will test using [ new tool ] to communicate, but will reevaluate on: [ date ]

**Application**

* + Which norms are critical for us to be aligned on?: \_\_\_\_\_ (e.g. activities we focus our time on when at the office together)
  + Which norms can we set based on our individual preferences: \_\_\_\_\_ (e.g. how we choose to set focus time)
  + How might these norms shift over quieter periods like holidays and between semesters?: \_\_\_\_\_