Training Expectations and Agreements

How establishing clear expectations and agreements supports teams and leaders

Topics Leadership, team dynamics, meeting facilitation, learning environment

Summary This activity is designed to open a training day. The facilitator leads the group through a democratic process of generating a set of expectations of what content they would find most useful in the session or training, as well as what the process might look like. The group members also compose a set of agreements that set forth the ground rules for creating a successful learning environment and achieving their expectations.

Not only can the "expectations and agreements" serve your training, but participants learn a process they can use in the field.

Objectives

- To create an open, safe, and democratic learning environment
- To empower the learners by giving them a voice in the how the activities unfold
- To give participants an opportunity to learn about one another and what they have in common
- To create structure and etiquette for the activities that follow
- To create an organic document that can be looked back on at the end of an activity or training for reflection/learning assessment purposes
- To provide participants with a tool they can use when facilitating meetings/ trainings in the field

Duration 15–20 minutes

Materials Chart paper and pens
Handouts 1–3

Background Not only does the creation of a group set of expectations and agreements help structure leadership training activities, it also creates a safe space for participants to contribute their thoughts on what may be sensitive topics. It provides a document that the group can adapt over the course of the training and it gives participants a tool for reflection at the end of an activity or training.

Expectations and agreements are commonly used by adult educators in large and small group settings and in long and short trainings.

Procedure *Warm Up:*

The ideal timing for the activity is immediately after the facilitator introduces the main training themes and the format of the training, and after individual introductions have been made.

Present to the group the concept of creating two lists. The first is a set of "agreements" composed of ground rules that everyone agrees to follow. The second list has briefly stated "expectations" that participants have of the training based on what they know so far.

The Activity:

1. Begin with a list of "expectations." Generate a list of what participants expect from the training. Ask clarifying questions and record the responses as briefly as possible. Use additional sheets if necessary.

2. Move on to "agreements." Ask the group for contributions. Ask clarifying questions and restate the participants' contributions as briefly as possible while retaining the original message. Check to make sure everyone understands (and approves of) the list of agreements and list them on chart paper. Use additional sheets of chart paper until everyone has had an opportunity to share their agreements. If your group is having difficulty understanding or coming up with a list of agreements, you can prompt the group with questions like, "What can we as a group agree to do in order to meet our list of expectations? How can we act towards one another (for example, be honest, listen, be open-minded) to maximize the time we spend together?"

3. Ask for group consensus. Can everyone in the room agree with every item on the list? If not, open the items in question up to discussion. Lead the conversation to a conclusion where the original agreement is clarified and consensus is reached, or it has been altered in such a way that everyone is content with it.

4. Encourage participants to use "expectations and agreements" when they facilitate trainings and meetings. Handouts 1–3, provided for future reference, can help with that process.

Wrap Up:

Let participants know that the finalized lists will be revisited at times throughout the training or session. New agreements can be added as the session or training progresses, if that serves the learning environment. Post the lists in plain sight so that participants can review the agreements and expectations easily throughout the session or training.

HANDOUT 1
Opening groups by setting expectations and agreements

Expectations

Developing group expectations allows group members to share the reasons they have come together. It is very informative to both the group and the facilitator. Gathering expectations gives the group a sense of ownership; it also gives the facilitator a better idea of what the group would like to experience during their time together.

How to generate expectations:

- Explain what expectations are to the group and provide them with a couple of examples
- Ask the group members to take a few minutes and silently think about what they would like to get out of the experience
- Prompt the group to share their expectations
- Lead the brainstorm by modeling strong facilitation skills and recording expectations on paper
- Read through the expectations and check for understanding from the entire group

Agreements

Members of a group need to decide how they would like to work together and what their norms will be. It is not the job of the facilitator to set the ground rules; instead, the participants should generate agreements and be held accountable for their decisions.

How to Generate Agreements:

- Set up a brainstorming session at the beginning of the meeting
- Ask the group to tell you ways they agree to work together—you may want to give them a couple of examples like “We will start and end on time”
- Lead the brainstorm by modeling strong facilitation skills and recording their expectations on paper
- Review each agreement and make sure all group members understand what it means
- Ask if the group will be willing to amend the agreements as the need arises
- Ask the group to commit to the list of agreements
- Use the agreements throughout your time together to help the group accomplish its objectives and to stay on task; feel free to review the agreements if necessary

HANDOUT 2
Expectations

Developing group expectations allows a group to share with each other and with the training staff the reasons why they chose to come together. Not only does it enhance the overall involvement for participants, but it also helps those leading sessions know and understand the needs of the participants.

My expectations for this training:

The group's expectations for this training:

HANDOUT 3
Agreements

Participants must also create a set of agreements in order to work together and achieve the expectations of the group. The group develops its own set of working standards by brainstorming.

Agreements that I would like to propose:

Our group's agreements: