Template for alignment of expectations

Why?

An alignment of expectations is a tool that can be used in the beginning of a project process and can be reviewed during a project. It's a good way of starting a conversation on how you work, how you want to communicate and to see if your goals are aligned.

It can be used to set a common set of group expectations and help align the groups thoughts, wishes and workload for the project.

How?

You can go through the entire template, or you can choose the parts that make sense for you, your project and where you are in the process. However, we recommend you go through as much as possible to ensure a good process and to reflect on all perspectives. You can choose to go through each theme separately or take 10-15 minutes where each member of the group writes down notes for all themes and then go through each theme together in the group. It is important that everyone is heard and to find compromises if there are disagreements. You can always return to the agreement and review your decisions if the process turns out differently.
Each theme has different reflection questions, that can help you consider what you expect and would like to agree on within your project and group. These are just helpful questions, and you can add other topics and questions as well if needed.

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Theme	Agreements
Project expectations • What are our goals for the project? • What are our success criteria for the project? (both quantitative and qualitative)	
Personal profile and prerequisites Take a round and go through all points for everyone. • Knowledge, skills or other contributions to the project • Engagement, time, and prioritization of the project • Strength and weaknesses • Working style (how and when do you work best) • Working under pressure • Need for control and structure • Keeping agreements (being on time, deadlines etc.) • Personal relations (to be aware of)	
Group and cultural community • How do we ensure space for everyone? • Openness and honesty • Decision making – how? • Conflict resolution • Giving and receiving feedback • Asking for help and setting boundaries • Internal evaluation (ongoing?) • Individual and shared responsibilities • Handling personal or private matters	
Project management and meetings • Process management (who and how) • Organising of meetings and work processes	

• Meetings – where, how often, how long? • Steering and leading of meetings • Group roles and delegating tasks • Minutes	
Project- and cooperation plan • Calendar (set milestones) • Planning (level of detail and areas of planning)	
Communication • Dialogue and discussion forms (how do we talk/tone of voice) • Platforms – where do we communicate and how (e-mail, Messenger, Zoom etc.)	

With inspiration from

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