



Team Protocols for Open Workspace: GSA's 7 Steps

7 steps for determining protocols for open plan and shared office space

People working in open plan environments, and/or sharing offices and cubicles should jointly agree on workspace protocols and codes of conduct (above and beyond any whole office space use guidelines or requirements).

Many aspects of office life lend themselves to agreeing on protocols as people start to visualize what it will be like moving from a situation in which they 'own' a desk and a certain space around it, to one in which they may be working in an open environment without a specifically assigned workspace.

1. Recognize the factors that cause irritation, loss of goodwill, and anxiety when working in an open plan office.

Open plan offices require people to decide and implement protocols for amiable space sharing. Listed below are some issues that should be agreed upon.

Confidentiality

- Handling sensitive information in the open areas
- Degree of privacy

Space usage

- Storage space usage
- Common use areas (pantries, work rooms)
- Use of wall spaces
- Use of empty offices/cubicles
- Booking the space (using it when booked, cancelling it if not going to use it, not turning up and just sitting in space someone may have booked)
- Knowing when someone doesn't want to be interrupted

Noise

- Radios, headphones
- Phone rings
- Conversations

Smells

- Scents and perfumes
- Food - smells, cooking, spills

Shared equipment

- Supplies (provision and use of)
- Printer and copier use (e.g. cover sheets on documents or not)

Cleanliness

- Clean desks
- Cleaning/sanitizing equipment e.g. phones, chairs

Connections

- Staying connected with colleagues
- Staying connected with customers

2. Assess how teams will use the space

Is the space going to be hotel space, free addressing, assigned seating, (in offices or cubicles) or a mix of all types of arrangement? Will protocols have to cover all types of usage?

Will work teams be sitting together in ‘neighborhoods’? If so does it make sense to have neighborhood protocols or whole floor protocols?

3. For each floor or neighborhood convene a small group representing the population to draw up protocols

In an ideal world everybody would have a hand in drawing up community guidelines. In reality it is easier if a small group (4 to 5 people) take on the task of drawing up protocols that are then discussed and refined by everyone who will be working to them.

The group should represent the population and be selected by nomination, vote, or volunteering. Local protocols should not be decided by a senior manager or issued as a mandate.

4. Develop protocol content

Write each protocol in the simplest possible way. A protocol is a description of a performance or behavior you want people to exhibit because they understand it. e.g.

Supplies: If supplies run out it can take 24 hours to fulfill an order. Please let Susan know if you see stationery supplies beginning to run low.

As you develop the protocols ask yourselves the following questions in relation to each one:

- Is it fair and equitable?
- Does it cover an area where there are likely to be conflicts and disagreements? (If not do you need it?)
- Is it clear and well bounded? (You don't want people to wriggle through gaps.) Will someone joining the group know how to behave when they read the protocol?
- Does it adequately address the motivations, strengths, and weaknesses of the target group? (For example can you justify asking people not to wear perfume because some people are sensitive to chemicals in it?)
- Does it account for any constraints that may make it unworkable?
- Does it self operate given the goodwill of the target group or does it require management attention to monitor and enforce? (Self operation is better).

- Does it add value to workspace use or is it unnecessary over-engineering?
- Does it provide for local interpretation if needed (but within the overall parameters)?
- Does it risk being compared favorably or unfavorably to other area's protocols?
- Is it controllable if needed, easy to monitor and implement, and motivating to work towards?
- Is it flexible and adaptable to meet new circumstances?
- Is it based on developing responsibility, cooperation and collaboration rather than on selfishness, competitiveness and punishment?

NOTE: *You will also need to establish protocols and ways of working together as you telework. See the telework information sheet on this topic.*

5. Review content with whole target audience and make any amendments

When you have drafted the content for each of your protocols circulate them to everyone who is the intended user for their comments, suggestions, and modifications.

Conduct a ‘walk-through’ of the protocols in use, or have a rehearsal day when everyone uses them to get a good understanding of whether they will be workable in practice.

Make any amendments based on the feedback.

6. Agree how they will be tracked and monitored and determine how you will handle non-compliance

The protocols are there to smooth the path of working together in a consistent, compatible, well understood way.

If people do not comply what are you going to do about it?

Make sure you know how you will handle non-compliance. (Check that your protocols are reasonable and don't encourage non-compliance because they are petty or unnecessarily prescriptive).

7. Implement the protocols for a trial period

It is very unlikely that you will get the protocols right from the start. When you introduce them do it for a 90 day period.

After 90 days do a formal review of their effectiveness.

Make any appropriate adjustments.