



Consultancy Protocol* (About 35 minutes each)

The consultancy protocol is an opportunity for an individual or team to think expansively about a concrete dilemma. Outside perspective is crucial to the protocol working effectively. The outside perspective helps uncover issues and new ways of viewing our challenges.

GUIDING FRAMEWORK

- Approach the conversation with loyalty to the community outcome.
- Empathy for the staff people responsible for managing the complexity.

PROTOCOL PROCESS

Pre Work:

- Assign facilitator/timekeeper
- Choose your dilemma and frame it as a question.

1. **Overview (3 min):** Presenter gives an overview of the dilemma and frames a dilemma question for the group to consider. Participants are silent.

Dilemma Question example: How do we support and ensure leadership buy in for racial equity, if we know we may need to try new ideas and be prepared for resistance?

2. **Clarifying Questions (4 min):** Participants ask clarifying questions of the presenter. Clarifying questions have brief, factual answers and are intended to help the group develop a deeper understanding of the dilemma.

An example of a clarifying question is “How many leaders are currently on your team?”

3. ***Probing Questions (6 min)***: Participants ask probing questions of the presenter. Probing questions help the presenter expand his/her thinking about the dilemma. However, probing questions should not be “advice in disguise”, such as “Have you ever considered...?” If you have a “right answer” in mind to your probing question, you are not truly posing a question. Please save discussion of your suggestions until the next session.

An example of a probing question is “What is your thinking on how to handle this issue?” There is no discussion by the group of the presenter’s responses.

4. ***Discussion (10 min)***: The presenter may restate the question, if necessary, and then physically steps back from the discussion. The group discusses the dilemma while the presenter is silent and takes notes.

Participants in discussion now approach the problem as if it is their own and brainstorm what their approach would be to this challenge. The discussing parties should resist the urge to speak directly to the presenter and instead address each other.

5. ***Reflection (3 min)***: The presenter reflects on what he/she has heard and what he/she is now thinking, sharing any points that particularly resonated and any potential next steps. It is not necessary to respond point by point to what was said during discussion.

6. ***Debrief (5 min)***: The facilitator leads a conversation about the group’s experience with the consultancy protocol. Participants should resist the urge to shift the debrief discussion back to the dilemma.

7. ***Closing the Loop (4 min)***: Participants have the opportunity to each share one “take away” from the discussion or something they will bring back to their practice. Participants should feel comfortable to pass on the opportunity.

** Adapted from the National School Reform Faculty protocols*