National School Reform Faculty

Harmony Education Center

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Consultancy Protocol
Overview

The Consultancy Protocol was developed by Gene Thompson-Grove as part of the Coalition of Essential Schools' National Re:Learning Faculty Program, and further adapted and revised as part of work of NSRF.

A Consultancy is a structured process for helping an individual or a team think more expansively about a particular, concrete dilemma. Outside perspective is critical to this protocol working effectively; therefore, some of the participants in the group must be people who do not share the presenter's specific dilemma at that time. When putting together a Consultancy group, be sure to include people with differing perspectives.

Framing Consultancy Dilemmas and Consultancy Questions
A dilemma is a puzzle, an issue that raises questions, an idea that seems to have conceptual gaps, something about process or product that you just can't figure out. Sometimes it will include samples of student or adult work that illustrate the dilemma, but often it is a dilemma that crosses over many parts of the educational process.

1. Think about your dilemma. Dilemmas deal with issues with which you are struggling or that you are unsure about. Some criteria for a dilemma might include:
   - Is it something that is bothering you enough that your thoughts regularly return to the dilemma?
   - Is it an issue/dilemma that is not already on its way to being resolved?
   - Is it an issue/ dilemma that does not depend on getting other people to change (in other words, can you affect the dilemma by changing your practice)?
   - Is it something that is important to you, and is it something you are actually willing to work on?

2. Do some reflective writing about your dilemma. Some questions that might help are:
   - Why is this a dilemma for you? Why is this dilemma important to you?
   - If you could take a snapshot of this dilemma, what would you/we see?
   - What have you done already to try to remedy or manage the dilemma?
   - What have been the results of those attempts?
   - Who do you hope changes? Who do you hope will take action to resolve this dilemma? If your answer is not you, you need to change your focus. You will want to present a dilemma that is about your practice, actions, behaviors, beliefs, and assumptions, and not someone else's.
   - What do you assume to be true about this dilemma, and how have these assumptions influenced your thinking about the dilemma?
   - What is your focus question? A focus question summarizes your dilemma and helps focus the feedback (see the next step).

3. Frame a focus question for your Consultancy group: Put your dilemma into question format.
   - Try to pose a question around the dilemma that seems to you to get to the heart of the matter.
   - Remember that the question you pose will guide the Consultancy group in their discussion of the dilemma.

4. Critique your focus question.
   - Is this question important to my practice?
   - Is this question important to student learning?
   - Is this question important to others in my profession?

Some Generic Examples of Dilemmas

- The teaching staff seems to love the idea of involving the students in meaningful learning that connects the students to real issues and an audience beyond school, but nothing seems to be happening in reality.
  Question: What can I do to capitalize on teachers' interest and to help them translate theory into practice?

- The community is participating in visioning work, but the work doesn't seem to relate to the actual life of the school — it is just too utopian.
  Question: How do I mesh dreams and reality?

- Teachers love doing projects with the students, but the projects never seem to connect to one another or have very coherent educational goals or focus; they are just fun.
  Question: How do I work with teachers so they move to deep learning about important concepts while still staying connected to hands-on learning?

- We keep getting grants to do specific projects with students and the community, but when the money is gone, the work doesn't continue.
  Question: How does sustainability actually work? What needs to change for it to work?

- No matter how hard I try to be inclusive and ask for everyone's ideas, about half of the people don't want to do anything new — they think things were just fine before.
  Question: How do I work with the people who don't want to change without alienating them?

Preparing to Present a Dilemma in a Consultancy Protocol

Come to the session with a description of a dilemma related to your practice. Write your dilemma with as much contextual description as you feel you need for understanding. One page is generally sufficient; even a half page is often enough. If you prefer not to write it out, you can make notes for yourself and do an oral presentation, but please do some preparation ahead of time.

End your description with a specific question. Frame your question thoughtfully. What do you REALLY want to know? What is your real dilemma? This question will help your Consultancy group focus its feedback. Questions that can be answered with a "yes" or "no" generally provide less feedback for the person with the dilemma, so avoid those kinds of questions. (See the previous pages for a process for framing Consultancy dilemmas and questions.)

Dilemmas deal with issues with which you are struggling — something that is problematic or has not been as effective as you would like it to be — anything related to your work. Consultancies give presenters an opportunity to tap the expertise in a group, and if past experiences offer any indication, you will be able to rely on the people in your Consultancy group to provide respectful, thoughtful, experienced-based responses to your dilemma.

A couple of caveats — we have found that Consultancies don't go well when people bring dilemmas that they are well on the way to figuring out themselves, or when they bring a dilemma that involves only getting other people to change. To get the most out of this experience, bring something that is still puzzling you about your practice. It is riskier to do, but we guarantee that you will learn more.

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Time
Approximately 50 minutes

Roles
Presenter (whose work is being discussed by the group)
Facilitator (who sometimes participates, depending on the size of the group)

1. The presenter gives an overview of the dilemma with which s/he is struggling, and frames a question for the Consultancy group to consider. The framing of this question, as well as the quality of the presenter's reflection on the dilemma being discussed, are key features of this protocol. If the presenter has brought student work, educator work, or other "artifacts," there is a pause here to silently examine the work/documents. The focus of the group's conversation is on the dilemma. (5-10 minutes)

2. The Consultancy group asks clarifying questions of the presenter — that is, questions that have brief, factual answers. (5 minutes)

3. The group asks probing questions of the presenter. These questions should be worded so that they help the presenter clarify and expand his/her thinking about the dilemma presented to the Consultancy group. The goal here is for the presenter to learn more about the question s/he framed or to do some analysis of the dilemma presented. The presenter may respond to the group's questions, but there is no discussion by the Consultancy group of the presenter's responses. At the end of the ten minutes, the facilitator asks the presenter to re-state his/her question for the group. (10 minutes)

4. The group talks with each other about the dilemma presented. (15 minutes)
Possible questions to frame the discussion:
What did we hear?
What didn't we hear that they think might be relevant?
What assumptions seem to be operating?
What questions does the dilemma raise for us?
What do we think about the dilemma?
What might we do or try if faced with a similar dilemma? What have we done in similar situations?

Members of the group sometimes suggest actions the presenter might consider taking. Most often, however, they work to define the issues more thoroughly and objectively. The presenter doesn't speak during this discussion, but instead listens and takes notes.

5. The presenter reflects on what s/he heard and on what s/he is now thinking, sharing with the group anything that particularly resonated for him or her during any part of the Consultancy. (5 minutes)

6. The facilitator leads a brief conversation about the group's observation of the Consultancy process. (5 minutes)

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Facilitation Tips

Step 1
The success of the Consultancy often depends on the quality of the presenter's reflection in Step 1 as well as on the quality and authenticity of the question framed for the Consultancy group. However, it is not uncommon for the presenter, at the end of a Consultancy, to say, "Now I know what my real question is." That is fine, too. It is sometimes helpful for the presenter to prepare ahead of time a brief (one-two page) written description of the dilemma and the issues related to it for the Consultancy group to read as part of Step 1.

Step 2
Clarifying questions are for the person asking them. They ask the presenter "who, what, where, when, and how." These are not "why" questions. They can be answered quickly and succinctly, often with a phrase or two.

Step 3
Probing questions are for the person answering them. They ask the presenter "why" (among other things), and are open-ended. They take longer to answer, and often require deep thought on the part of the presenter before s/he speaks.

Step 4
When the group talks while the presenter listens, it is helpful for the presenter to pull his/her chair back slightly away from the group. This protocol asks the Consultancy group to talk about the presenter in the third person, almost as if s/he is not there. As awkward as this may feel at first, it often opens up a rich conversation, and it gives the presenter an opportunity to listen and take notes, without having to respond to the group in any way. Remember that it is the group's job to offer an analysis of the dilemma or question presented. It is not necessary to solve the dilemma or to offer a definitive answer.

It is important for the presenter to listen in a non-defensive manner. Listen for new ideas, perspectives, and approaches. Listen to the group's analysis of your question/issues. Listen for assumptions — both your own and the group's — implicit in the conversation. Don't listen for judgment of you by the group. This is not supposed to be about you, but about a question you have raised. Remember that you asked the group to help you with this dilemma.

Step 5
The point of this time period is not for the presenter to give a "blow by blow" response to the group's conversation, nor is it to defend or further explain. Rather, this is a time for the presenter to talk about what were, for him/her, the most significant comments, ideas and questions s/he heard. The presenter can also share any new thoughts or questions s/he had while listening to the Consultancy group.

Step 6
Debriefing the process is key. Don't short-change this step.

Protocols are most powerful and effective when used within an ongoing professional learning community such as a Critical Friends Group® and facilitated by a skilled coach. To learn more about professional learning communities and seminars for new or experienced coaches, please visit the National School Reform Faculty website at www.nsrfharmony.org.