



Center for Leadership & Educational Equity

## Consultancy Protocol

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*Developed by Faith Dunne, Paula Evans, and Gene Thompson-Grove as part of their work at the Coalition of Essential Schools and the Annenberg Institute for School Reform.*

### **Purpose**

The structure of the Consultancy helps presenters get new ideas from other people's perspectives, knowledge and experience to bring to a particular and concrete dilemma.

### **Set Up for Success**

#### **Establish the Group**

Consider forming groups that include participants who bring diverse experience and don't share the specific dilemma at that time.

### **Practice Probing Questions**

The quality of probing questions is key to the success of this protocol. Before using Consultancy Protocol take the group through Probing Questions Exercise and Pocket Guide to Probing Questions.

A word about probing questions: they ask the presenter "why" (among other things), and are open-ended. They are intended to help the presenter think not necessarily even answer in that moment. They may require deep thought. Remind group members to avoid suggestions and recommendations disguised as questions ("Don't you think you should...?" or "Have you ever thought about...?")

Everyone should be sensitive to the presenter's vulnerability in sharing a dilemma. Advise participants (and perhaps model) to speak in a way that is constructive, avoiding judgement or criticism of the presenter instead stay focused on the dilemma and question raised.

Group will act as if the presenter is not there so the presenter can fully listen without feeling called to respond in any way. As awkward as this may feel at first, it gives the presenter an opportunity to listen and take notes, without having to respond to the group in any way. This keeps defensiveness at a minimum, and allows for a richer conversation. Some presenters like to pull their chairs to the side or back from the group a bit.

### **Time**

30-60 minutes

### **Roles**

Presenter,  
Facilitator,  
Consultants;  
group of 3-10

Presenter will learn most if able to listen in a non-defensive manner for new ideas, perspectives, and approaches. When presenter reflects, it is a time to talk about new thoughts, ideas, questions rather than give a blow by blow response to the group's conversation, defend or further explain.

### **Suggestions for Presenter Preparation: Framing Consultancy Dilemmas and Consultancy Questions**

A dilemma is something that can't be simply solved, something you haven't been able to figure out on your own.

Presenter preparation: Write the dilemma with as much description as you feel you need for others to understand. You could write it out as a narrative or just make notes to use when you present your dilemma to the group.

#### **1. Think About Your Dilemma**

Some questions to help you select a dilemma might include:

- Is it something that is bothering you enough that it lingers in your mind?
- Is it something that you are still trying to resolve?
- Is it something that you alone can affect by changing something yourself?
- Is it something that is important to you?

#### **2. Describe Your Dilemma (in writing)**

Some questions that might help you describe your dilemma include:

- Why is this a dilemma for you?
- Why is this dilemma important to you to address?
- 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 happened?
- Who needs to change or 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, 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?

#### **3. Frame a Focus Question for Your Consultancy Group**

Talk with another person, ideally the facilitator, to help you find this focus question. The question will guide the group's discussion. Try to find the question that gets to the heart of that matter for you.

Avoid yes or no questions as they generally lead to less room for discussion.



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Consultancy Protocol  
Participant Handout

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**Purpose**

The structure of the Consultancy helps presenters expand their thinking to get new ideas to bring to a particular and concrete dilemma by tapping the knowledge and experience in a group.

**Steps**

1. Presenter: provide an overview of the dilemma with which you struggle. Frame a question for the group to think about. 5-7 minutes
2. Group: ask clarifying questions that have brief, factual answers to help you better understand the context, situation, dilemma. Think about who, what, when, where, why. 2 minutes
3. Group: ask probing questions to help presenter think in new ways, from new angles, about the dilemma. (See Pocket Guide to Probing Questions).  
Presenter listen and record questions. 4 minutes
4. Presenter: choose from the list of probing questions which prompt new thoughts that you would like to think about out loud. For instance, question that lead you to say: "I never thought about it that way."  
Consultants: listen with no discussion. Presenter restate focus question 3-5 minutes
5. Group discussion: Talk with each other about the dilemma presented. In this step, you might restate what you heard is the dilemma, the problem. Direct your talk to each other, not the presenter. 7-10 minutes  
Presenter: listen. You may even move your chair to the side so you are not part of the discussion by mistake yet can still hear everything.  
The group works to define the issues more thoroughly and objectively. Take notes on thoughts you want to remember and/or reflect on with group.

**Time**

Approximately 50 minutes

**Materials**

Something write notes with and on Artifacts presenter wants to share if applicable

**Roles**

Presenter of dilemma  
Facilitator ensures that group stays focused on analyzing dilemma  
Group of Consultants

Possible questions to frame the discussion:

- What did we hear?
- What didn't we hear that 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?

After you have understood and analyzed the dilemma, you can write suggestions on a note card to give the presenter.

6. Presenter: share reflections and new thoughts with group.  
Group listen. No discussion. 3-5 minutes

### **Debrief**

Presenter: How did this process work for you? What was challenging?

Group: reflect on process and new learning. 5 minutes