Consultancy Protocol

(Developed as part of the Coalition of Essential Schools’ National Learning Faculty Program, and further adapted and revised as part of work of the Annenberg Institute’s National School Reform Faculty Project)

A consultancy is a structured process for helping an individual or group of people think more expansively about a particular, concrete problem or 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 problem at that time.

Time: 50 minutes

Roles:
Presenter (whose work is being discussed by the group)
Facilitator (who also participates)

Steps:
1. The presenter gives a quick overview of the dilemma or problem. She highlights the major issues with which she 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. (5 minutes)
2. The group reads the dilemma. (5 minutes)
3. The consultancy group asks clarifying or “skinny” questions of the presenter – that is, questions that have brief, factual answers. (5 minutes)
4. The group then asks probing or “fat” questions of the presenter – these questions should be worded so that they help the presenter clarify and expand her thinking about the dilemma she presented to the consultancy group. The goal here is for the presenter to learn more about the question she framed or to do some analysis of the dilemma she presented. The presenter responds to the group’s questions, but there is no discussion by the larger group of the presenter’s responses. (10 minutes)
5. The group then talks with each other about the dilemma presented. What did you hear? What didn’t you hear that you think might be relevant? What do you think about the problem? Members of the group sometimes suggest solutions to the dilemma; most often, however, they work to define the issues more thoroughly and objectively. The presenter is not allowed to speak during this discussion, but instead should listen and take notes. (15 minutes)
6. The presenter then responds to the discussion (first in a fishbowl if there is more than one presenter and if they prefer to begin that way), followed by a whole group discussion. This should include a brief conversation about the consultancy process. (5 minutes)
7. The facilitator leads a brief conversation about the group’s observations of the process. (5 minutes)