# Consultancy Protocol

**Adapted from School Reform Initiative: See more at** [**schoolreforminitiative.org**](http://schoolreforminitiative.org/)

This consultancy protocol can be used in school team meetings, professional learning communities, classrooms, and other convenings of stakeholders to support SEL implementation. Its purpose is to help individuals think more deeply about a concrete dilemma around SEL implementation and to build collaboration and collective efficacy among stakeholders. It is ideal for small groups that meet regularly so that the responsibility for sharing a dilemma can be rotated among group members over a series of meetings.

**Preparing a dilemma for discussion**

A dilemma is a puzzle: an issue that raises questions, an idea that is challenging to put into practice, or something about a process or relationship that you just can’t figure out. When choosing a dilemma to discuss with a consultancy group, you’ll want to share a question that will benefit from multiple perspectives and can reasonably be addressed through an individual’s or team’s collective action. Consider these questions when brainstorming dilemmas:

* + Is it something that is bothering you enough that your thoughts regularly return to it?
  + Is it something that is not already on its way to being resolved?
  + Is it something that does not depend on getting other people to change - in other words, can you/your team affect the dilemma through your practices?
  + Is it something that is important to you, and is it something you are willing to work on?

Once you **select a dilemma** to bring to the consultancy group, **frame a focus question** that gets to the heart of the matter, and **prepare background information and** **context** to share with the group.

For example:

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| --- | --- | --- |
| **Dilemma** | **Framing Question** | **Background Information** |
| Our staff seems to love the idea of SEL, but nothing seems to be happening in reality. | What can I do to capitalize on our school’s interest, so we can translate ideas into practice? | -Evidence that “nothing seems to be happening”  -Why I think staff love the idea of SEL  -What I’ve tried so far to support implementation |
| No matter how hard we try to be inclusive and ask for everyone’s ideas as we try to implement SEL, about half of the people don’t want to do anything new — they think things were just fine before. | How do we move forward with SEL implementation without alienating the people who don’t want to change practices? | -SEL implementation data -Information that has led me to believe some don’t want to change practices -Brief description of how we’ve approached community about SEL and how we’ve tried to be inclusive |
| I am committed to promoting students’ SEL, but I feel pressured to spend more and more class time on academic work in order to meet standards by end of year. | How do I incorporate SEL into my classroom, while keeping up with the demands of the academic curriculum and moving students to achieve at the highest possible level? | -Strategies I have been using to promote SEL given time constraints -How I’m currently scheduling learning blocks in my classroom -Academic goals for my classroom |

**Facilitating the consultancy**

**Roles**

* Presenter (whose dilemma is being discussed by the group)
* Facilitator (who poses questions below and helps drive the conversation and ensure equity of voice)
* Timekeeper (who keeps conversation flowing according to the minute guidelines below, and provides helpful reminders to participants on timing)
* Consultants: Outside perspective is critical to the effectiveness of this protocol; therefore, some of the participants in the group should be people who do not share the presenter’s specific dilemma at that time.

**Process (35 minutes total)**

1. The presenter gives an overview of the issue and frames a question for the consultancy group to consider. **(5 minutes)**

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

Examples of clarifying questions:

* Did I understand you when you said…?
* What was the last thing that happened?
* Did you already…?
* What happened when…?
* How much time…?
* What materials did you use?

3. The consultancy group asks probing questions of the presenter. These open-ended questions should be worded so that they help the presenter clarify and expand her/his thinking about the dilemma presented to the consultancy group. The goal is for the presenter to learn more about the question she/he framed and to do some analysis of the issue presented. The presenter responds to the group’s questions, although sometimes a probing question might ask the presenter to see the dilemma in such a novel way that the response is simply, “I never thought about it that way.”

The consultants do not discuss or respond to the presenter’s responses, and they do not offer suggestions or attempt to lead the presenter to a conclusion. At the end of the 10 minutes, the facilitator asks the presenter to re-state her/his question for the group. **(10 minutes)**

Examples of probing questions:

* Why do you think this is the case?
* What would have to change in order for…?
* How did you decide/determine/conclude…?
* What was your intention when…?
* What’s the connection between… and …?
* What is the best thing that could happen?
* If you were X, how would you see this situation?
* If time and money weren’t an issue…?
* What do you think is the root cause of…?

4. The presenter steps back and the consultants talk with each other about the issue presented. In this step, the consultants work to define the issues more thoroughly and objectively. The goal is not to solve the dilemma, but rather to analyze it and bring in new perspective. If a consultant suggests an action the presenter might take, it should be framed as an “open suggestion,” and should be made only after the group has thoroughly analyzed the dilemma. The presenter doesn’t speak during this discussion but listens in and takes notes. The consultants talk about the presenter in the third person. **(13 minutes)**

Examples of questions the facilitator can ask 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 issue?
* What might we do or try if faced with a similar issue?
* What have we done in similar situations?

5. The presenter reflects on what she/he heard and on what she/he is now thinking, sharing with the group anything that particularly resonated for him or her during any part of the consultancy. **(2 minutes)**