



# Consultancy Protocol

## Framing Consultancy Dilemmas

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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. Revised by Gene Thompson-Grove January 2021*

### **Purpose**

The structure of the Consultancy helps presenters think more expansively about a particular, concrete dilemma. The Consultancy protocol has 2 main purposes – to develop participants' capacity to see and describe the dilemmas that are the essential material of their work, and to help each other understand and deal with them.

### **Framing Consultancy Dilemmas and Consultancy Questions**

A dilemma is a puzzle: an issue that raises questions, an idea that seems to have conceptual gaps, or something about process or product that you just can't figure out. All dilemmas have some sort of identifiable tension in them. Sometimes the dilemma will include samples of student or adult work that illustrate it, but often the dilemma 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 questions for helping you select a dilemma might include:

- 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 affect the dilemma by changing your practice?
- Is it something that is important to you, and is it something you are 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?
- What (or where) is the tension in your dilemma?
- 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 needs to change? Who needs to 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.

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

- 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 — with framing questions

- My teaching team seems to love the idea of involving students in meaningful learning that connects 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 my team's interest, so we can translate theory into practice?
- 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?
- I am completely committed to the value of play for children's learning in my early childhood classroom, but am often feel pressured to spend more and more time on academic work.  
Question: How do I incorporate play into my 1st grade classroom, while keeping the demands of the academic curriculum in mind?

### Preparing to Present using the 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? Name the tension(s) in the framing question. 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.

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 puzzling you about your practice. It is riskier to do, but we guarantee that you will learn more.

*Note: See Consultancy Protocol to process dilemmas.*



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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)

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. The Consultancy group is typically a small and intimate one – from 4-7 people. Larger groups can easily subdivide into consultancy groups.

### **Process**

1. The presenter gives an overview of the dilemma with which they are 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. (10-15 minutes if there are artifacts to examine)
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 (See Pocket Guide to Probing Questions). These questions should be worded so that they help the presenter clarify and expand their thinking about the dilemma presented to the consultancy group. The goal here is for the presenter to learn more about the question they framed and to do some analysis of the dilemma 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.” There is no discussion by the consultancy group of the presenter’s responses. At the end of the 10 minutes, the facilitator asks the presenter to re-state their question for the group. (10 minutes)

4. The group talks with each other about the dilemma presented. In this step, the group works to define the issues more thoroughly and objectively. Sometimes members of the group suggest actions the presenter might consider taking; if they do, these should be framed as “open suggestions,” 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 group talks about the presenter in the third person. (15 minutes)

*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 have been raised for us?
- What meaning are we making about the dilemma and what we heard?
- What haven’t we considered/thought about?

5. The presenter reflects on what they heard and on what they are 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)

*Note: See Consultancy Dilemmas to craft dilemmas for use with the Consultancy Protocol and Facilitation Tips for process advice.*



## Consultancy Protocol Facilitation Tips

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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 to say at the end of a consultancy, "Now I know what my real question is." It is helpful for the presenter to prepare a brief (1-2 page) written description of the dilemma and the issues related to it for the consultancy group to read or listen to as part of Step 1.
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 2. The presenter has ready answers to clarifying questions.
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 they speak. Remind group members to avoid suggestions and recommendations disguised as questions ("Don't you think you should...?" or "Have you ever thought about...?") See the *Pocket Guide to Probing Questions* for more guidance about framing powerful questions.
4. The facilitator's job in this step is to help the group thoroughly analyze the dilemma, resisting the temptation to "solve" the problem. Remember that it is the group's job to offer an analysis of the dilemma presented, focused by the framing questions. It is not necessary to solve the dilemma or to offer a definitive answer.

This protocol asks the consultants to talk about the presenter in the third person, almost as if they are not there. 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 to ensue. Some presenters like to pull their chairs back from the group a bit.

It is important for the presenter to listen in a non-defensive manner. The presenter should listen for new ideas, perspectives, and approaches. They should listen to the group's analysis of their question/issues. They should listen for the assumptions — both their own and the group's — implicit in the conversation. The presenter should not listen for judgment of themselves by the group. This is not supposed to be about the presenter, but about a question they have raised. The presenter should remember that they asked the group to help them with this dilemma.

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 them, the most significant comments, ideas and questions they heard. The presenter can also share any new thoughts or questions they had while listening to the consultancy group.
6. Debriefing the process is key. Don't short-change this step.