



TOOL CONSULTANCY PROTOCOL

OVERVIEW

The Consultancy Protocol is a method of structured conversation around a dilemma you are facing. It's used to gather input or feedback on how to approach a challenge. Designed to create a space for someone to explore the dilemma with support of a group, but without the group immediately giving them an "answer," this tool can be helpful as most dilemmas don't have a single answer. Rather, dilemmas require us to choose between two or more options. *This version of the protocol has been adapted from the National School Reform Faculty (<https://nsrfharmony.org/>).*

WHEN TO USE

Because of the strict time structure, this group discussion tool is best suited for small to medium group sizes (5-15). It can be used in team meetings, conferences, classrooms, or trainings and spaces where there is high trust between participants; it's a feedback tool after all. It can also be used to build trust when set up as a tool for learning. This is a highly structured activity with a set flow.



HOW TO USE

Set-up: There are three key roles that need to be filled for this method. The first is the presenter. This is the person presenting their challenge or dilemma. This person will be responsible for preparing a Presentation of Learning based on their challenge or dilemma and have a clear (or close to clear) ask from the group on what they're hoping to come away with. The second is the facilitator, the person who will move a group through the protocol and ensure integrity to the laid-out flow. The third role is peer participants, the people listening closely to the presenter and on the ready to respond to prompts from the facilitator.



It can also be helpful to have a designated timekeeper, though this can also be fulfilled by the facilitator. If the group is together in person, the group should sit in a circle where they can see each other and be in a space where it's easy to listen. You can also print the quick guide (see page 4) and provide a copy to all participants for a reference of the flow.

Before you begin, help the person presenting their dilemma to identify an appropriate challenge. The Consultancy Protocol works best when people select a situation that has multiple good or bad courses of action that they must choose between. For example, a group is planning community engagement and wants to be inclusive of all voices but has heard that activists and government officials won't sit down at a table together. It doesn't work as well for problems that have a technical solution. For example, someone wants to know how to better market their event and needs expertise from communications or marketing folks on how to improve engagement.

Opening and Overview: The facilitator reviews the steps in this process and reminds the group of the purpose for the discussion. For example, the facilitator might say something like "Welcome to this Consultancy Protocol. We're here to hear about Ramón's dilemma in how to hold a colleague accountable. We'll take some time to hear from Ramón. We'll then move into clarifying and probing questions and then move into group discussion. Following the group discussion, we'll get to hear from Ramón again and then wrap up with a debrief." During this overview, it's important to name the difference between clarifying and probing questions (see below). This segment should take no more than 5 minutes.

Presentation of Learning: The presenter gives an overview of a dilemma or practice with which they are struggling and frames a question for the group to consider. In some cases, the presenter will bring a concrete example of a practice, artifact, or document for the group to review. This presentation can be done auditorily and/or with an accompanying visual like a power point or Google slide deck. This segment should take between 5-10 minutes, including any review of artifacts or documents. If the dilemma requires a lot of contexts, artifacts can be sent to participants in advance for review.

Clarifying Questions: At this point, the facilitator invites peers to pose clarifying questions to the presenter. Clarifying questions are questions that have brief, factual answers to make sure everyone understands the nature of the dilemma and any necessary background. This segment should take no more than 5 minutes.

Probing Questions: Following clarifying questions, the group is invited to ask probing questions of the presenter. Probing questions are questions that help the presenter clarify and expand their thinking about the dilemma presented to the group. Participants should avoid giving advice disguised as a question (e.g. "Have you tried...?") or talking about their



own dilemmas (e.g. “That’s just like what we are wrestling with...”) and instead focused on supporting the presenter’s thinking. Some examples of probing questions include:

- What’s at risk if you get this wrong?
- What lessons have you learned from similar situations?
- What’s at stake for [insert name] in this dilemma?
- What resources can you leverage in this situation?

It’ll be key for the facilitator to listen for advice-based questions and redirect as needed. This segment should take between 5-10 minutes.

Group Discussion: This is where the group members have an opportunity to talk to each other about the dilemma while the presenter remains silent and takes notes. If the group is physically together the presenter might move to the side depending on the set up. In a virtual space, the presenter can turn their camera off and mute their mic while they listen in. The facilitator’s role is to move the group into discussion. Possible questions to jumpstart the discussion include:

- What is really at the heart of the matter here?
- What did we hear? What didn’t we hear that think might be relevant?
- What assumptions seem to be operating?
- What might we do or try if faced with a similar dilemma?

Members of the group work to define the issues more thoroughly and objectively. At this point, they can suggest actions the presenter might consider. This segment should take between 10-15 minutes.

Presenter Response: Group members remain silent as the presenter responds to what they heard during the group discussion, sharing with the group anything that particularly resonated for them during the group discussion or any new idea(s) that has emerged. This segment should take no more than 5 minutes.

Debrief: The facilitator initiates a debrief of the discussion, asking for observations on both the content and process of the discussion. This segment should take no more than 5 minutes.

This tool has been adapted from the National School Reform Faculty [Consultancy Protocol](#)



CONSULTANCY PROTOCOL FOR LEARNING COMMUNITIES

Opening and Overview **5 minutes**

Facilitator reviews the steps in the process; reminds the group of the purpose for the discussion.

Presentation of Learning **5-10 minutes**

The presenter gives an overview of a dilemma or practice with which they are struggling and frames a question for the group to consider. If the presenter has brought a concrete example of a practice or other artifact, there is a pause here to silently examine the work/documents.

Clarifying Questions **5 minutes**

The group asks clarifying questions of the presenter – that is, questions that have brief, factual answers to make sure everyone understands the presenters understanding of the feedback and their proposed goals.

Probing Questions **5-10 minutes**

The group asks probing questions of the presenter—that is, questions that help the presenter clarify and expand their thinking about the dilemma presented to the group. Participants should avoid giving advice disguised as a question (“Have you tried. . .”) or talking about their own dilemmas (“That’s just like what we are wrestling with. . .”) but instead stay focused on supporting the presenter’s thinking.

Group Discussion **10-15 minutes**

The group talks with each other about the information shared so far while the presenter remains silent and takes notes. Possible questions to frame the discussion:

- What is really at the heart of the matter here?
- What did we hear? What didn’t we hear that we think might be relevant?
- What assumptions seem to be operating?
- What might we do or try if faced with a similar dilemma?

Members of the group work to define the issues more thoroughly and objectively and can suggest actions the presenter might consider taking.

Presenter Response **5 minutes**

The group remains silent as the presenter responds, sharing with the group anything that particularly resonated for them during the group discussion or any new idea that has emerged.

Debrief **5 minutes**

The facilitator initiates a debrief of the discussion, asking for observations on both the content and the process of the discussion.



COMMUNITY LEARNING MODEL

Dialogue

Create a high-quality conversation that clarifies values, surfaces tensions, and taps into creativity; leading to concrete plans that achieve results. Establish conditions of genuine respect for the views and needs of the other.

Consultancy Protocol is a tool for the Dialogue phase of the Community Learning Model. To learn more about tools for dialogue and the other areas of the Community Learning Model, visit civikkanopy.org/clm.

