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Reflections on Adapting/Creating Protocols

Adapted from "A Facilitator's Book of Questions by David Allen & Tina Blythe

*This is an edited reprint of part of the NSRF Resource Book. We felt it was time to give these ideas more "air time" within the context of **Connections**, and also to encourage you **Connections** readers to send us protocols you've adapted or created. -- editors*

Before Adapting or Creating a New Protocol

As a facilitator of a group that is using NSRF protocols in your work, you may find that you and/or your group experience some dissatisfaction with a protocol once it has been tried. In response, you (or others) might be inclined to change the protocol or make up a new one. While either of these options could be productive, our experience suggests that you and your group might want to try the following things first, particularly in the case of the dilemma protocols or others used with student and/or adult work.

Talk to your group

Whether the group, or you, or all of you together are sensing a problem with the protocol being used, a candid conversation is an important step toward identifying possible issues. Almost every protocol has a built in “debriefing” step at the end of it. Be sure to leave enough time for this step!

Give the protocol some time

Protocols, by their nature, place restrictions on the natural flow of conversation. This is not always comfortable for participants, and this discomfort might be at the root of the group’s dissatisfaction. If this is the case, getting familiar with a protocol by doing it a few times as it is written might be the best strategy. Furthermore, protocols, like any complex tool, take a bit of practice in order to be used effectively. So, it might take a few tries before you and your group are able to figure out just what your chosen protocol can really help you achieve and what it can’t.

Try another "established" protocol

If lack of experience with protocols in general or with the particular protocol you’ve chosen isn’t the problem, it might be that you have chosen a protocol that doesn’t match well with your presenter's needs or purposes. It might be worth revisiting (and perhaps revising) goals with the presenter and/or with the group, and then experimenting with some other protocols. Again, if the protocol is one that is new to you, it might take a few tries before everyone can really determine how well it helps to achieve the presenter's objectives.

Ask a more experienced coach, the facilitator who trained you, or the NSRF office

A conversation with someone who has used the protocol frequently can help you pinpoint some possible areas of difficulty and come up with strategies for dealing with them.

If you decide to adapt or create a protocol

In adapting or creating a new protocol, there are two kinds of issues to consider: conceptual (having to do with how you construct the new protocol) and logistical (having to do with how you share the protocol with others).

Conceptual issues

Good protocols can take a long time to develop. Most of the protocols in popular use now have been through many rounds of experimentation and revision. Good protocols are designed to create particular kinds of balances among competing needs, interests, and inclinations. Different protocols create different kinds of balances, depending on their purposes. Because of these delicate balances, seemingly small changes in a protocol's steps can create big changes in the kind of conversations people have and, therefore, in the kinds of things they can accomplish. As you adapt or create a protocol, here are some questions to think about:

What is your purpose? What does your presenter want to have come out of the protocol? Why is it important to the participants to talk about this dilemma or work together? Are you seeking to open up and explore issues broadly? Or are you hoping to solve specific problems? (Or some mixture of the two?) The other questions on this list should be considered in light of your answer to the purpose question.

How will your protocol balance opportunities for people both to express their own perspectives and to consider the perspectives of others? Typically, this is done through a careful orchestration of who can talk when. Does the presenter or the group start the conversation? Does the presenter or the group have the last word? Is there a time when the presenter & group should talk together, or should one always be listening while the other is speaking?

How will your protocol balance the interests and needs of the presenter with the interests and needs of the group? Should the presenter identify a focus for

the conversation? The group? Both together? Is the focus here on helping the individual improve their practice or on creating opportunities for the whole group to reflect collectively about their own educational practice? (Of course, to some extent, all protocols allow for both of these things. The question is where you want the emphasis to be.)

How will your protocol balance free conversation and structured conversation? Protocols typically ask people to respond in specific ways to the work that is on the table: At what points will your protocol invite very focused conversation? At what points will it invite more open-ended, less-focused conversation and comment?

When (if at all) will context for the work be shared? In the beginning of the conversation? In the middle? Only at the end?

Note: Even though many of these questions raise the issue of how to balance various needs, all those needs don't have to be given equal time in every protocol. For example, depending on your purposes, you might construct a protocol that allows for lots of group talk and very little presenter talk, or vice versa. The point isn't to tell you that the two needs must be met equally, but rather to encourage you to be deliberate in your choices about which needs you will foreground and how.

Logistical issues

There are now a dozen or more protocols that are used widely throughout the world, and hundreds more that are developed and used in specific groups, schools, or districts. We suggest these guidelines to help everyone easily distinguish one protocol from another. When you commit your adapted or brand new protocol to paper or website (even in draft form), we invite you to follow these guidelines, too:

1) Give the protocol its own name. Things can get confusing when two, three, or more very different protocols are all named the Tuning Protocol! When you make a significant* adaptation or create a new protocol, give it a name that will distinguish it from other protocols. (The name doesn't have to be entirely unique: for instance, the "California Tuning Protocol" is an adaptation of the Tuning Protocol.) We encourage names that will be memorable, easy to spell and Google, and ideally, at least somewhat descriptive of the work or outcome of the protocol. (We love the Issaquah Protocol, but new

coaches struggle considerably remembering the name and how to spell it, and often have to think awhile to remember what it does and when to use it.)

2) Name the protocol which you are adapting or from which you're deriving your new protocol. For example, the Modified Collaborative Assessment Conference includes the attribution: "A variation of the Collaborative Assessment Conference developed by Steve Seidel."

3) Include your own name and/or your group's name on the new or adapted protocol. You never know where your protocol might end up once you've put it in writing, especially on the web. It can be helpful to let people know where it came from so that they can get in touch with you if they have questions about how to use it. At NSRF, we appreciate hearing stories and receiving copies of new or adapted protocols. Whenever possible, we like to share them with *Connections* readers, so this is an opportunity for you to be officially published.

4) Structure your protocol as follows, if possible: Include a statement of the purpose for the protocol and/or the goals it is intended to achieve, the estimated time to conduct the entire protocol, approximate time for each step, prerequisites/scaffolding, need for preconferencing, materials to gather, size of group for which the protocol is best suited, and any other details a new person would find helpful in using this protocol.

* Of course, a significant adaptation is a judgment call. If, for example, you're tinkering with the amount of time to allow for warm and cool feedback in the Tuning Protocol, you probably don't need to worry about renaming it. However, if you are altering the purpose of the protocol, moving the protocol's steps around, eliminating steps, or adding steps, those are typically the kind of changes that warrant giving the resulting protocol a new name.

NSRF from time to time conducts on-site trainings for experienced coaches and is currently planning an open training designed around adapting and creating new protocols. If you are interested in joining or possibly hosting this group, please [email](mailto:) or call us at 812-330-2702. — editors



Postcards from The Past

By Luci Englert McKean, *Connections* Managing Editor and CFG Coach in Indiana luci@nsrfharmony.org

At the end of many New Coaches Trainings, we use an activity we call "Postcards To The Future You." The facilitator spreads an assortment of postcards on a table, and once the attendees have written their final reflections for the week, they're invited to select a postcard for themselves. They're instructed to write in their home or work address on the right side of the card. Then on the left, they write their future selves a note ... something that they'd want to remember from the training, a quote, a reminder about a piece of work they or a colleague completed, or maybe a bit of cheerleading. At the end of the day, the facilitator brings or sends me the stack of postcards, and I magically select "a future time" to mail the postcards back to the people who wrote them.

Lucky me (and the letter carrier), we get to read people's notes to themselves, some of which baffle me, but others which make me smile. We thought we'd share some with you in this and future issues of *Connections*, and maybe you can imagine a past self of your own, sending you a special message. At the July Open Training, one of our participants told us about a website called [Future Me](http://FutureMe.com) where you can write emails to yourself and schedule them to be sent days or even years later. Although emails aren't as pretty as picture postcards, they definitely can be valuable, as well. (Thanks for the tip, Patrick!)

