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LETTER FROM THE DIRECTOR: To Create or Not Create a New Protocol, That is the Question

By Michele Mattoon, NSRF National Facilitator, and Director of the NSRF, michele@nsrfharmony.org

(With apologies to William Shakespeare, we wanted to address a question we hear often at NSRF.)

I have spent a lot of time as a national facilitator training people to become CFG coaches, emphasizing the idea of respecting the structure of protocols. If you have a fair amount of experience facilitating protocols, you know that not following the structure can have disastrous results. Once you stray from the correct steps, timing, language, or other details, groups can quickly dissolve into their default mode of communicating, which leads to inefficient and ineffective "business as usual."

However, there are times when coaches or facilitators may perceive the need to create a new protocol or adapt an existing one. For example, you may have tried a protocol and were not satisfied with the result. Or, perhaps you cannot find a protocol that seems to fit the exact needs of the presenter. Or you may not have enough time to run a protocol as it is written and have to come up with something that will fit your schedule.

My first suggestion is to give a protocol some time before you make any changes. The first time you facilitate a protocol, it's bound to feel a bit awkward, especially if you are not an experienced facilitator or coach. But if the protocol is not working for you after the third time trying it, you will have more information about why it's not working and then can make modifications accordingly.

You might also try talking to an experienced facilitator or coach to make sure that you have the right protocol for the job. Anyone who has done this work for a number of years has many failures, big and small, under their belt. With failure comes a myriad of learnings. So, it's definitely worthwhile to pick the brain of someone who has an understanding of what could work, given the circumstance.

OK, so you tried both of these ideas and have come to the conclusion that yes, you really do need to modify an existing protocol or create a brand new one. A word of caution—little changes can mean very different outcomes. For example, let's say that you do not have enough time to run a Consultancy Protocol as it is written. The protocol is written to take 50 minutes to run:

5-10 minutes to present the dilemma
5 minutes for clarifying questions
10 minutes for probing questions
15 minutes to talk about the dilemma
5 minutes for the presenter to reflect back to the group
5 minutes for the debrief

So, what do you cut? Let's say you decide to give the presenter only five minutes to present. That might work. However, if the dilemma is a particularly complex one, that might not be the best option. People will not be able to help someone nearly as effectively if they don't understand the context. Even with five minutes for clarifying questions, there might be misconceptions floating around. And, if people really don't understand the dilemma, the whole protocol can end with the presenter feeling as frustrated as before. The best remedy for this situation is to pre-conference with your presenter to determine whether it makes sense to cut time in this step.

Hmmm, what about cutting the probing questions time? Even if you carve out a couple of those ten minutes for the group to first quietly write their probing questions, you'll still have eight minutes to ask the questions and some time for the presenter to tell the group which question or two pushed their thinking the most. This could be a good place to cut time, as long as you are sure that you give the presenter an adequate amount of time to absorb the questions. People who present during a dilemma protocol often state that the probing questions piece is the most valuable part of the protocol. If just one probing question pushes your thinking into new directions that shed new light on the problem, the whole protocol has been worth it. So, shortchanging this time could also have adverse effects, leaving the presenter in the same stuck place.

Of course you could simply cut the time for the discussion, but that's really the part that the presenter might feel is the most important. Hearing others struggle with your dilemma, while adding insights based on their experiences can be incredibly enlightening. Making this time shorter could leave the presenter and the group unsatisfied.

See what we mean? By the way, if you'd like to see some of our more widely used protocols modified for shorter times, you can visit our collection of Thirty-Minute Protocols.

If you decide to create your own protocol, there are essential elements that should be taken into consideration.

• Almost every protocol has a place for the presenter to present (their work, a dilemma, what's needed by a group, etc.).

• There should be a time for questions—many times clarifying, sometimes probing.

• Every protocol needs time built in for silent reflection, analysis and/or taking notes for feedback.

• Often during a protocol, the presenter is asked to move away or pull back from the group while the group members are giving feedback, in order to listen and take notes without worrying about responding to the comments. This is followed by an opportunity for the presenter to reflect on what was helpful to them and what actions they are now thinking about taking.

• No protocol needs every one of these steps, and some include other steps not written here, but every protocol should end with a debrief session.

As I often get asked about this process, we're contemplating offering an Experienced Coaches Training around protocol creation. In the meantime, I decided to write an activity around modifying and creating protocols. (You might want to check and see how many of the above mentioned elements I have incorporated into this protocol!) If you're interested in learning more, download that activity on our website here. [Editor's note: viewing links in future issues of Connections will require a paid NSRF membership.]

And finally, once you do create a new protocol, take it on more than one test drive. Take time to smooth out all the kinks. I can't even tell you how many revisions some protocols have had, as they continue to be refined over the years of use. Once you feel it's ready to share more broadly, give it a name (preferably identifying what the protocol tries to accomplish, like the "Tuning Protocol"), add a subtitle if necessary ("adapted from the Student Staffing Protocol") and send it to us. If we think your protocol is unique and helpful, we'll add it to our library of resources, with your name on it, of course! What a great way to share your knowledge and contribute to educators' toolboxes all around the world.

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