

LEARNING EXCHANGE PROTOCOL

Equity-Centered Critical Friends TUNING PROTOCOL

Note: All protocols have multiple origins. The strength of a protocol is in the ability of facilitators or planners to adjust/revise for use in your context. <http://www.nsrfharmony.org/free-resources/protocols/a-z> is a good source of multiple protocols for school, district, community and organizational use.

Adapted from work of SFCES (San Francisco Coalition of Essential Small Schools) with input from Kristen Bijur and Nora Houseman from SF Community School.

There are two types of protocols related to the CRITICAL FRIEND protocols developed in the 1980s by the Annenberg reform movements: Consultancy PROTOCOL to deal with the dilemmas we consistently face in schools and Tuning PROTOCOL to look at ideas or proposals. We are using the Tuning Protocol to look at your action plans.

One key point of this process is to uncover what obstacles (particularly related to overarching equity concerns) stand in the way of accomplishing what you plan to do.

You have developed an action plan based on your learning and reflection during the Leadership Learning Exchange. You will have a chance to “tune” the action plan based on feedback from another team; these are your **critical** (important and vital) **friends**. That means they are hoping to be warm (helpful and supportive) demanders – asking questions and making suggestions that offer you a way to improve your plans in a way that is helpful. If you have large teams, we may divide your team up so that you can have the benefit of multiple perspectives. There are FOUR roles for this process, but you do not always have to do this in teams:

- FACILITATOR
- PRESENTER (S)
- TEAM MEMBERS (OPTIONAL)
- DISCUSSANTS (OTHER TEAM OR OTHER INDIVIDUALS)

NOTE: THIS PROCESS DOES NOT HAVE TO OCCUR IN TEAMS; IT MAY BE SINGLE PERSONS

Process	Time ¹	Person
Introduction: Facilitator introduces processes and time periods for today; keeps process going and keeps time.	2 min	Facilitator National Faculty
Presentation of Action Plan Presenter is from a team	4-5 min	Presenter
Clarifying Questions: Discussants Make sure they are factual questions	5 min	Discussants ask presenter and team members
Probing Questions Use suggested question frames. Presenter hears all questions, writes them down for future use and chooses 1-2 for response	4 min	Discussants to Presenter and team members
Discussion: Discussants refer to facts and responses to probing question to offer ideas about ways to improve plan, offering warm and cool feedback (presenter and team take notes, but do not talk; sit out of group if possible)	8 min	Discussants offer ideas about improvement while presentation team takes notes
Presenter and team says what is helpful and what next step might be	4 min	Presenter
Debrief Process can be at end of all	2 min	Facilitator

The key factors of all Critical Friends tuning protocols are:

- Adherence to time is key. Facilitator (or timekeeper) needs to keep group on time. In this amount of time, what can be accomplished is significant.
- The presenter(s) and team members presenting must NOT participate in discussion. It is usually best to sit to side and take notes.
- Discussants can vary from 1-6, but larger is problematic
- Warm and cool feedback is important in discussion
- The word critical is important as it can have differing connotations. In this case critical means important or vital to learning. It does not mean “be critical”, although warm and cool feedback using probing questions is a key part of the process.
- Focusing the probing questions on equity gets at the important parts of the plan.
- Debriefing is vital to process

Other types of critical friends formats – variations on the theme – are on this website and <http://www.cesnothwest.org> and www.nsr.org. (numerous protocols for engaging in CFG)

PROBING QUESTIONS (Starter) Available from www.sfcess.org
Adjust questions to integrate with plan and conversation with presenter.

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- ¹ Time allotments are flexible

What works best is to highlight the questions that are relevant to discussants and then the presenter and team should then highlight which questions were asked.

WORKING FROM THE INSIDE-OUT

- What old fears and concerns does this plan of action activate for you?
- What is the conversation you need to have to enact the plan fully?
- How do your experiences as a _____ contribute to this plan?
- What do you value and believe about students that would help you carry out the plan?

FEAR

- What level of discomfort are you feeling in enacting this plan?
- How willing are you to be uncomfortable?
- What do you fear will happen if you push?
- What do you fear will happen if you fail?

SKILL, KNOWLEDGE and CAPACITY

- From what do you draw to make a decision about the plan?
- What do you still need to learn before you are ready to say what you want to do?
- What is your limit?

POWER

- What in this situation do you need to know and be able to do to use your power to respond to students who are not being reached?
- Who makes decisions in this situation?
- How could you imagine interrupting the power dynamic?
- To whom do you feel accountable?

LEADERSHIP FOR EQUITY

- How do your will, skill, capacity and knowledge qualify you to lead for equity in this plan of action?
- What has been your experience in a similar situation when the outcome was uncertain?
- What is the role of making a decision of integrity in knowing how to act on this plan?

ALLIANCES

- What would it look like to serve as an ally across the difference to make this all work?
- What might keep you from doing what you should do?
- In what ways are you or something else keeping you from doing what you believe is right?

EMOTIONS

- What emotional triggers might be present in this plan enactment?
- How can you reframe the emotional content of the plan?
- How can you honor emotions without having them completely dominate?

TRUST and SAFETY

- What does the plan bring up about trust and/or safety?
- How can you feel safe in taking this plan on?
- What would it take to trust in this situation?

TRUTH

- What will total honesty do in enacting this plan?
- What secret are you holding?
- What are you afraid to say out loud?

HOPE

- How does your work in this area contribute to a sense of hope?
- How can you optimize the plan enactment?