

Expert Convening Protocol

Our Aim: To increase the number of underrepresented students who graduate college, career and civic ready.

Purpose: The purpose of this protocol is to learn from people who have relevant expertise - *and who provide multiple perspectives* - on the issue a team wants to improve. Ideally, the presenting team should leave with a deeper understanding of the factors contributing to the issue and clear next steps for moving the work forward. The role of the presenting team members is to actively listen and take notes, with one team member facilitating the protocol.

Roles:

- **Facilitator** will guide the group through the protocol and help them uphold the norms, while keeping time.
- **Scribe** will capture the ideas of the experts as they emerge.
- **Experts** will share their perspectives on the issue being discussed.

Norms:

- **“Yes and”**... the goal is to explore many ideas, and not fixate on one
- **Seek to understand**... ask clarifying and probing questions to dig deeper
- **Share the air**... so that all experts are able to contribute their ideas
- **Invite others in**

Protocol:

1. **Overview & Introductions** (5 min): The facilitator reviews the purpose, protocol and norms. Participants each take 30 seconds to share: name, role, where they work/study, and one reason this conversation is important to them.
2. **Clarifying and Probing Questions** (5 min.): Experts ask the presenting team clarifying and probing questions to understand the team’s aim (avoiding advice in disguise such as “Have you thought about...”).
3. **Reflecting on the Aim and Discussion Questions** (5 min.): Experts write/think about the questions in the Discussion Round (Step 4) and what they would like to contribute to the discussion.
4. **Discussion Rounds** (35 min. total):
Each round begins with a quick whip where each expert *briefly* shares their initial thoughts on the question. Experts may choose to pass. Then participants engage in a free-flowing conversation with the time left. *The presenting team members are silent and take notes; it may help to have a scribe capture ideas on poster paper as they emerge.*
 - **Round 1 (Reflections - 10 min.):** What do we need to think about if we want to achieve this aim?

- **Round 2 (Resources - 10 min.):** Who else is working on this aim, and has experienced success? (Who should we talk to? Where should we go? What research should we seek out?)
OR Who has helped you related to this aim? How?
 - **Round 3 (Change Ideas - 10 min.):** What are 1-2 concrete actions you think we should take to achieve our aim? Which actions do you think would have the greatest impact?
 - **Round 4 (Final Word - 5 min):** Any last thoughts? Anything particularly resonating with you?
5. **Team Reflection** (5 min.): The presenting team member and the scribe reflects on what struck them from the conversation, questions that emerged, and possible next steps. *The experts are silent.*
6. **Debrief** (5 min.): All participants reflect on the process using the following questions as a guide:
- Did this protocol help all involved develop a deeper understanding of how to achieve the aim?
 - How did this feel? How did we do upholding our norms?
 - What changes would we make to the protocol before trying it again?



After the Protocol (if relevant):

The presenting team meets to revisit and revise their theory of action using the following as a guide:

- Based on the Expert Convening, what are we learning about the problem we want to address?
- Is there anything missing from our theory of action (i.e. driver diagram)? Are our drivers necessary and sufficient for moving our aim?
- What new questions are emerging for us?
- What are our next steps?

* This protocol was designed by the Center for Research on Equity and Innovation at the High Tech High Graduate School of Education.