

NEXT STEPS PROTOCOL

This protocol is typically used at the end of an equity visit. It is intended as a brainstorm to generate many possible ideas for the host team to consider in subsequent meetings, not as a structure for creating a concrete plan.

It can be conducted as a full-group discussion, but for groups larger than 8, it is more effective to break into smaller groups of 4 or 5 participants. It takes approximately 50–60 minutes to complete.

PURPOSE

- To support host teams in developing short-, medium-, and longer-term goals and strategies based on feedback from an equity visit.

ROLES

- Each small group (4–5 participants) includes:
 - *Facilitator*—Supports the group’s process, including reviewing purposes, introducing and transitioning between steps, and keeping time.
 - *Equity visit observers*—Responsible for drawing on their professional experience to offer recommendations.
 - *Recorder*—Records the group’s agreed-upon possible next steps; presents to the larger group.

Note: Host leadership team members are encouraged to listen actively and reflect on potential next steps identified.

MATERIALS

- Copies of the protocol
- Chart paper and markers for each small group

STEPS

- *Review purpose, roles, and steps (by facilitator)*—2–3 min.
- *Individual brainstorming*—5–7 min.
 - Observers individually brainstorm possible action items for short-, medium-, and long-term goals and strategies.

- ***Developing suggestions—20–25 min.***
 - In small groups, observers develop a small set of suggestions for each designated time period: short, medium, longer term (e.g. 30, 90, and 180 days). Groups may use different strategies, including:
 - Individuals take turns sharing their short-, medium-, and longer-term suggestions, while others listen.
 - Groups focus on each period, discussing suggestions from all members for each period before moving on to the next.
 - Recorder records final suggestions for each period on chart paper to share with host team and larger group.

Note: During this segment, host leadership team members may circulate, listening in on groups as they deliberate but not answering questions or otherwise interacting with groups.

- ***Sharing suggestions—5–7 min.***
 - The reporter from each group briefly shares suggestions for short-, medium-, and longer-term goals and strategies; answers clarifying questions.
- ***Host leadership team reflections—5–10 min.***
 - Members of the host leadership team briefly reflect on what they heard in suggestions.

Note: Members should not try to address every suggestion that came up or explain why a suggestion would not work, but rather focus on those that are most useful in supporting their thinking going forward.

- ***Debrief process—3–5 min.***
 - Facilitator leads brief reflection on how process of protocol worked for group, including suggestions for using it in the future.



Available for download at resources.corwin.com/equityvisits