

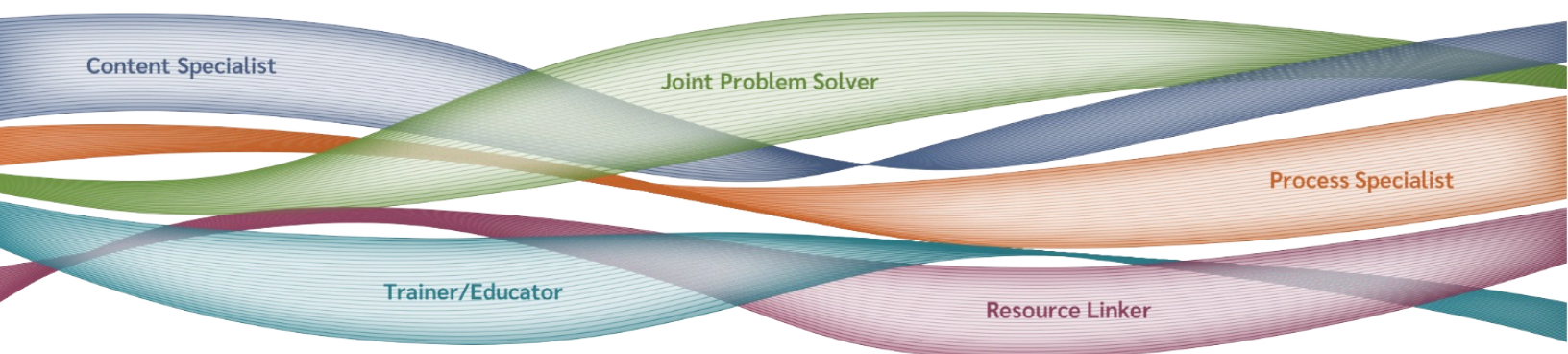
## Tool: Exploring Consultant Roles

School improvement consultants typically play multiple types of roles in every client engagement. Those roles vary according to what's needed in a given situation, at a given moment. This requires the consultant to continually assess what might be most helpful and to master and move among different roles with fluidity. Individuals typically have default preferences for and experience with some roles more than others, but ultimately consultants must master the full range of roles to be most effective.

The Exploring Consultant Roles tool helps consultants think about roles that range from operating as a subject matter expert to providing process facilitation. Between these ends of the continuum, examples of roles include content specialist, trainer/educator, joint problem solver, resource linker, and process specialist.

**Subject Matter Expert**

**Process Facilitator**



### Content Specialist

Provides specialized subject matter expertise to advise on methods and solutions

### Trainer/Educator

Creates learning experiences and provides direct teaching

### Joint Problem Solver

Collaborates with client in all processes of problem solving; works together with client to design and implement system changes

### Resource Linker

Gathers information and resources to help clients assess options and consequences

### Process Specialist

Facilitates improvement processes; objectively observes, raises issues and questions, and provides feedback

## Making Sense of the Consultant Role Continuum

We all have default preferences for some roles over others. After reading the description of the five examples of roles, rank order the roles from your least preferred (1) to most preferred (5).

\_\_\_ **Content Specialist**    \_\_\_ **Trainer/Educator**    \_\_\_ **Joint Problem Solver**    \_\_\_ **Resource Linker**    \_\_\_ **Process Specialist**

Think about your rankings.

- What do you notice?
- Do you tend to gravitate more toward the Subject Matter Expert or Process Facilitator end of the continuum? Why do you tend to gravitate that way?
- How do you know when you need to shift roles during a consulting engagement?

Think about a recent consulting engagement.

- What role(s) did you play? What was the result?
- What other roles might you have taken? What might have happened if you played a different role (process- and outcomes-wise)?

Think about future consulting engagements and your own professional development goals.

- How can you gain competence and confidence in using each role?