inFORM

Leadership *for* **Learning**
THE CAMBRIDGE NETWORK

Critical Friendship

Introduction

Who is your professional sounding board? Who asks you the questions that help you see things in a new light? Who stimulates your thinking, and brings ideas from elsewhere? Who is a bit removed from your work situation and yet understands it? Who provides you with a slightly detached viewpoint and a valuable fresh pair of eyes? Who do you trust to have the best interests of you and your work at heart, and yet is not afraid to be very challenging? Who motivates you and provides reassurance? Who assists you and your team to keep on track, sometimes to try new directions, and to exceed your original expectations? Who models principled ways of working, caring about people and about outcomes?

Someone who fulfills this role could be described as 'a critical friend' – a term that incorporates ambiguities and tensions, and in so doing captures its rich and powerful essence.

Who are your critical friends? For whom are you a critical friend?

This edition of Inform concentrates upon Critical Friendship, seeking to shed some light on a valuable role and a potentially transforming relationship. The rest of this introductory page explores the notion of a critical friend by comparing it with other roles. Page 2 focuses upon the critical friend, page 3 upon school colleagues, while on page 4 there is an opportunity to read what critical friends and school colleagues say about each other. A variety of examples of the use of critical friendship are described on page 5. Then on pages 6 and 7 John Jones, a Leadership for Learning Associate, reports on a headteacher as critical friend international exchange – which all involved found "a challenging activity and one that was full of learning". It also had a surprising and welcome effect on the sports field! Page 7 gives recommendations for further reading and contact details. And finally, can you suggest a name for the school colleagues with whom critical friends work? If so, please let us know (see page 3).

Similar but different

Critical friends provide a particular form of support that has similarities with other roles, yet has its own distinctiveness. A brief consideration of some of these other roles offers specific points for comparison and contrast.

Advisers, inspectors, school improvement officers and strategy consultants who work under the auspices of a local education authority (LEA) bring to their work with school colleagues a specific external agenda, and carry responsibilities for monitoring and reporting as well as supporting and challenging. LEA officials have degrees of formal power by virtue of their position. Ofsted inspectors are in a similar position. Imposed agendas, accountability to others for reporting and specific targets, and exploitation of power differentials are all at odds with the observance of critical friendship.

Counsellors use many of the same skills and share some of the same qualities as critical friends, but their interest focuses upon an individual, his or her feelings and personal issues. A critical friend is concerned with organisational matters, and with outcomes, effects and implications for many different people, as well as the personal well-being of individuals. Like counsellors, coaches and mentors also are concerned with the performance of specific people. Coaches and mentors have generally had experience of the role occupied by the person they are working with, which is not necessarily the case with critical friends. Coaches tend to be directive in their approach, whereas critical friends are more facilitative. Mentors may (consciously or unconsciously) see the people they work with as protégés, and the relationship can be similar to that of a master and apprentice. Using a transactional analysis model, this is closer to a 'parent-child' relationship, whereas critical friends try to foster an 'adult-adult' relationship.

Consultants are probably closest to critical friends in their role and functioning, and indeed some people use these two terms interchangeably. Others, including some LfL Associates, particularly dislike the description 'consultant', much preferring the word 'critical friend'. The widespread use of the word 'consultant' across professions, business, industry, services and commerce means that any individual's experience of consultants is likely to be varied, and results in the term carrying both positive and negative connotations. In comparison with consultants, critical friends are more process than task orientated; transformative rather than transactional; tend to be engaged for a longer period of time; operate within a clear set of values; and work with people who are open to fundamental change rather than simply seeking the solution to a specific problem. These distinctions are generalisations, and many specific examples could be found of consultants operating in exactly the way in which critical friends are portrayed here.

The Characteristics and Development of a Critical Friend:

Lists, Frameworks, Standards and Portfolios

Much of the research and writing about critical friends concentrates on their characteristics, and produces descriptions and lists of what makes a good critical friend. Based upon a wide range of research, five categories are presented below to describe the work, conduct and characteristics of a critical friend.

Roles (particular functions undertaken to achieve the overall aim):
- ✓ Facilitator
- ✓ Participant
- ✓ Supporter
- ✓ Role model
- ✓ Critic
- ✓ Broker
- ✓ Challenger
- ✓ Advocate
- ✓ Adviser
- ✓ Researcher
- ✓ Catalyst
- ✓ Disseminator
- ✓ Networker
- ✓ Monitor and evaluator
- ✓ Listener

Behaviours (specific things that the critical friend does):
- ✓ Listens
- ✓ Challenges
- ✓ Questions
- ✓ Encourages
- ✓ Reflects
- ✓ Prompts
- ✓ Feeds back
- ✓ Reassures
- ✓ Summarises

Knowledge and experience (relevant background, knowledge and understanding):
- ✓ Education and school systems
- ✓ Particular programme/area being supported
- ✓ Schools as organisations
- ✓ Learning (adults and pupils)
- ✓ Change process

Skills (particular techniques employed):
- ✓ Interpersonal and group work skills including listening, observing, questioning, communicating clearly, managing conflict, team building, collaboration
- ✓ Technical skills, relevant to the particular programme or role
- ✓ Analysis and interpretation of different types of data
- ✓ Synthesis of knowledge from a range of sources
- ✓ Managing change

Qualities (character, attitudes, beliefs, and values):
- ✓ Respect
- ✓ Resilience
- ✓ Empathy
- ✓ Courage
- ✓ Genuineness
- ✓ Diplomacy
- ✓ Confidence
- ✓ Impartiality
- ✓ Optimism
- ✓ Initiative
- ✓ Sensitivity
- ✓ Reflective
- ✓ Insight
- ✓ Self-critical
- ✓ Thoughtfulness
- ✓ Flexible
- ✓ Commitment
- ✓ Resourceful
- ✓ Self-effacement
- ✓ Tolerant of ambiguity
- ✓ Self-sufficiency

These are formidable, perhaps daunting, lists and set a high standard for critical friends. Perhaps they should be regarded as aspirations. Critical friends could use them as a basis for self-evaluation and personal development. School colleagues could use them to inform their awareness of the potential of critical friendship, and to help shape the combination of desirable characteristics they should seek in a critical friend for a specific project.

Considerable caution though is needed when using lists such as these. Words mean different things to different people. Some characteristics are easier to observe and assess than others and can therefore be given undue prominence. Giving too much credence to discrete points can lead to an atomistic approach which is not helpful to the critical friends themselves, nor to those who support their development, nor those who work with them.

The 'list of words' approach to describing characteristics and requirements is elaborated in standards or frameworks. These typically contain expanded statements, sometimes exemplified by or related to stages of the person's development. Two such frameworks of direct relevance to critical friends have recently been published. The National Association of Educational Inspectors, Advisers and Consultants (NAEIAC) has produced a framework describing the skills and abilities required to undertake the role of an education inspector/adviser/ consultant. It is accompanied by an appendix which refers to the underpinning areas of knowledge and understanding. The DfES has produced a set of standards for school improvement professionals (a phrase which could include critical friends), designed to be used for selection, monitoring and professional development. These standards focus upon the core responsibilities of LEA officials: monitoring, challenge, intervention and support. Accompanying the standards is a training and development framework, which gives examples of each standard at different stages in a professional's development, and provides a matrix to record self and peer evaluation, and the evidence upon which judgements were made.

NAEIAC commissioned Leadership for Learning to produce materials to support the development of a professional portfolio. This gives detailed guidance on the process of building and maintaining a portfolio, and on using it for personal development, presentation and communication. The materials are based upon, and cross referenced to, NAEIAC's National Framework of Competencies, the DfES' National Standards for School Improvement Professionals, and also criteria from the Integration Leadership Competencies Profile Clusters that are widely used as part of 360° reviews. The professional portfolio is therefore directly related to each of the three key frameworks of competencies and standards, and is highly practical, supporting both a process and a product.

These frameworks and accompanying materials can be very helpful for critical friends' development and support. They illuminate the extent and detail of what the role can involve, and map out the knowledge, understanding, skills and attributes necessary to fulfil that role. They remind us that we can all continue to improve as a critical friend, that frameworks and programmes are available to support us, and that this is an area for continuous professional development.

School colleagues, and their contribution to the relationship

There is relatively little research and writing about critical friendship, and what there is concentrates almost exclusively on the critical friend. There has been hardly any attention paid to the other person or people in the relationship, for example school colleagues. However, we do not need research to tell us that the dynamics, pleasure and outcomes of any relationship are influenced by the particular characteristics of the people involved and how they interact. Critical friendship is much more than a transaction or a business arrangement; significantly, it is a relationship built on trust, underpinned by values.

Critical friendship can be thought of as having a number of phases: initiation, negotiation, action and cessation. What can and should school colleagues do at each of these phases to help their relationships with critical friends be as productive as possible?

If school colleagues have a choice of critical friends (which ideally should be the case), they need to be clear about what they are looking for in the critical friend. However, it is best to remain partially open minded since we do not always know the full range of opportunities or their advantages, and sometimes our ideas are ill founded. As far as possible school colleagues and their critical friends should share similar values. Unless school colleagues have some way of knowing about their critical friend in advance, perhaps through a mutual acquaintance, or because the potential critical friend makes their values explicit, the exploration of common ground should take place in an initial meeting. If there is a gulf between the parties, it is probably better to terminate the relationship and for school colleagues to look for another more compatible critical friend. There are likely to be difficulties if the critical friend and school colleague have conflicting values – for example, if one partner prioritises 'quick fix' tactics for increasing performance in external tests and exams, while the other values 'capacity building' approaches to school improvement.

During the negotiation phase it is crucial to establish expectations, boundaries, ground rules and protocols. Both parties need to be clear about the purpose and the focus of the critical friendship, what it will address and what is beyond its remit. It may well be that it is difficult or inappropriate to define limits at the beginning of an exploratory process, but they must be agreed as soon as possible. Everyone needs to be clear about issues of confidentiality: what will be shared and reported, and to whom? What is the extent of the critical friend's freedom within the school, to talk to people and to go into different areas? Again, these things may develop and change over time, as trust is established and deepened, but all these issues should be addressed. The value of initial discussions between critical friends and school colleagues is emphasised in John Jones' report on pages 6 and 7.

Along with sharing similar values and establishing expectations, there are also certain attitudes, behaviours and practical steps that oil the wheels of critical friendship. Both partners need to be willing to listen, to be open to the other's views, suggestions or comments, and to engage in debate. This genuine listening to the other also needs to be matched by an openness and honesty in sharing perceptions. It helps enormously if there is a shared language, and a common understanding of words and terms. Simple practical points such as being prepared for meetings, and completing agreed tasks on time, are obvious but important. Such things remain significant during the action phase, which is probably the longest period of the relationship, and when relationships can be taken for granted rather than being worked at and further developed.

The final phase will be easier if school colleagues have avoided dependency upon the critical friend during the action phase. School colleagues need to ensure that attitudes, skills, structures and systems have all been appropriately developed so that whatever process was the focus of the critical friendship continues once the relationship has ceased.

School colleagues share responsibility with critical friends for establishing and maintaining the trust and mutual respect that are the bedrock of successful critical friendships. The value and effect of such relationships will be partly determined by the effort that school colleagues apply to them.

Search for a name

There does not appear to be a commonly accepted or appropriate term for the school colleagues with whom critical friends work. Consultants work with clients, but do we want to talk about a critical friend's clients? Is there a better word? What should the school colleagues who are the focus for critical friendship be called?

Please contact Sue Swaffield on *ses42@cam.ac.uk* with your suggestions!

The things they say:
What critical friends and school colleagues say about each other, and the relationship

Things that work in one place don't necessarily work in another

We're better than the sum of our parts

It's important to have that core of beliefs because otherwise you would be constantly pinged around by external imperatives

If we have a disagreement it's because we each have a genuine different belief – and we have to be open

You need the relationship to be in place to accept criticism

He is almost one of us but not quite

I need my critical friend to come along and stop me getting too inward looking

Someone to argue with, and it's ok to disagree

She won't pretend that everything is rosy when it's not

Both have got to want the relationship to work

You can trust her

You can't do it on your own

She's quite strong within herself

He has integrity

It's very important to create boundaries, not barriers

Who is talking about whom?

Do you agree?

Is it important?

Which statements challenge, confirm or extend your thinking about critical friendship?

Critical friendship in different contexts

Critical friendship has been, and continues to be, applied in a variety of contexts. For example, it has been used with reference to school governors; teachers carrying out action research, and accredited study; study support; and LEA support for schools. Critical friendship is an element common to many Leadership for Learning projects and activities. The adaptability of the role means that it can be used in different situations, some of which are discussed below.

How can critical friends assist schools?

School self evaluation

It is perhaps a paradox that an external critical friend can be so valuable in self evaluation. An outsider with a different perspective, who sees things through a different lens, acts as a mirror and a sounding board, and asks provocative questions, contributes essential elements to school self evaluation. Developing self-knowledge is a complex and sensitive process, which a critical friend can assist in many different ways. For instance, he or she can help create the climate, critique plans, advise and perhaps assist with data gathering and analysis, suggest relevant readings, refer to practice elsewhere, encourage and reassure.

School improvement projects

At any one time, a school will be working on its own specific improvement projects, probably identified within its improvement plan and possibly arising from the process of school self evaluation or external inspection. Whatever the particular focus, a critical friend can contribute significantly to the success of the work, by adding an extra dimension and critiquing the process. It is important though for everyone to be clear just what, and what is not, pertinent to the critical friend's role.

A school leadership team engaging with substantial and difficult change, such as school amalgamation or a major restructuring of curriculum and teaching arrangements, may well appreciate a critical friend's contribution.

School leader support and development

As well as supporting processes and projects, critical friends can also be helpful working with particular people in the fulfillment of their roles. For example, a group of relatively inexperienced middle managers could benefit from a period of support from a critical friend as they come to grips with their responsibilities, develop their skills, and carry out a range of tasks for the first time.

Many headteachers have excellent colleagues with whom they discuss ideas. Nevertheless, headship can be lonely, schools can become insular. Even experienced heads find that a critical friend is a valued confidant who can bring a wider perspective. Headship is even more challenging for those recently appointed, and for those in schools facing particularly challenging circumstances. The National College for School Leadership's Consultant Leader Development Programme, in which headteachers in effect act as critical friends for others, recognises that those in leadership positions in schools can benefit greatly from the support of an experienced outsider. The headteacher acting as the consultant also gains from the accompanying development programme, and from the experience of working with other colleagues in different schools.

Networking

Networks have always existed, and they are currently being promoted in the form of Networked Learning Communities (NLCs). In their application to become an NLC each group of schools is required to nominate a critical friend, whose role is both to support and critique the group's work, and also to facilitate networking with other groups.

Teacher research and accredited study

Critical friends have traditionally been an integral part of school based action research carried out by teachers. The recent Best Practice Research Scholarship scheme required that each teacher had the equivalent of a critical friend. Although the BPRS scheme itself is coming to an end, the principle that teachers undertaking research should be supported by a critical friend holds good.

Some teacher research is directly connected with programmes of accredited study, and many professional development certificated courses require teachers to undertake some research. Whatever the particular configuration or requirement of the programme, many people find critical friends invaluable when they are studying.

How can critical friends be assisted?

Critical friends also benefit from critical friends. They can themselves be assisted to improve their skills and expertise, formally or informally. Leadership for Learning runs training programmes for critical friends, assists with portfolio development, and supports critical friendship activities.

International Headteacher Critical Friendship Exchange

John Jones is an Associate of Leadership for Learning, is a very experienced critical friend himself, and has worked extensively training critical friends and school colleagues together. Here John describes an international headteacher critical friendship exchange.

How the project began

In January 2002, at the ICSEI Conference in Copenhagen, John Jones, LfL Associate, and Mary Sinclair from the New Zealand Ministry of Education began discussions about an exchange of headteachers/principals as a means of leadership development. Six English headteachers would work for a week in six New Zealand schools conducting enquiries, as critical friends, into a significant issue of leadership/learning in each school. Later in the year, the six New Zealand principals would come to England to reverse the process. Eventually, the English headteachers visited N.Z. in June 2002 and the N.Z. principals came to Cheshire in October. Each week-long visit was preceded by a two-day training programme for all 12 heads/principals and was followed by a one-day review meeting.
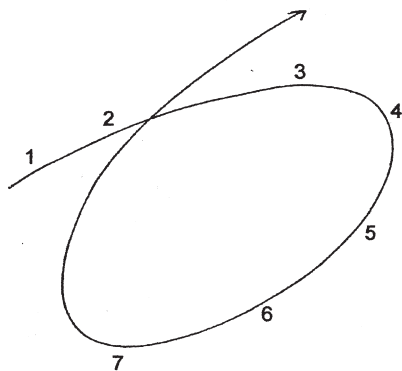
What the project was for

The project was designed to enable us to reflect on and review the value of headteacher peer critical friendship as a means of leadership development, and particularly, to assess its value when working in a different education system and national culture.

The process of enquiry used by the head as a critical friend

Each headteacher conducted an enquiry into some aspect of leadership/learning in the host school. Typical aspects included school strategic leadership, strategies for leading schools in challenging circumstances, and models and approaches to learning in the school. The process for conducting the enquiry was as follows:

1. Agree the focus with the host school, the reasons why it matters, the success criteria for the project.

2. Agree detailed criteria against which to examine the focus in detail. What does the focus mean? What do we conduct an enquiry into?

3. Make plans.

4. Critical Friend gathers information:

   • Lesson observation
   • Asking students, teachers, etc.
   • Statistical analysis
   • Looking at work, lesson plans, staff handbooks, etc.

5. Critical Friend formulates conclusions:

   • Strengths
   • Issues for discussion/development
   • Suggestions for next steps.

6 Critical Friend presents conclusions to the "school".

7. Review, and reflection on the process.

The two-day training for critical friends and hosts

It was essential that critical friends and hosts shared a common understanding of the education system in the host country and a shared approach to the conduct of the enquiry in the host school. Therefore the following were essential components of the two-day training:

- Detailed outline of host country education system and current issues in the education service

- Shared understanding of the process for conducting the enquiry

- Agreement about ground rules for collecting information, for example for lesson observation, or asking students' opinions

- Formulation of recording sheets for gathering information

- Agreement about Stage 6 of the process: style and content of the presentation.

It was also essential that the critical friend and host headteacher had quality time during the two days to get to know each other and establish trust.

The review of the benefits of the critical friendship to headteachers as leaders in their own schools

The review was conducted with all 12 heads on the Saturdays which followed the week in N.Z. in June and the week in Cheshire in October.

The review highlighted the gains for each of the participants. Indeed, several talked of the "life-changing experience" of the two-way exchange. It obviously enhanced headteachers' process skills, their ability to conduct a full-scale enquiry and their skills as critical friends inside their own schools. Several identified the importance of questioning skills, of objectivity, and of clarifying language – for example what we mean when we make 'judgements' as opposed to 'suggestions'. Others considered the agreeing of purposes and ground rules/protocols to be very important and felt they would use these processes in their own schools. The host schools also valued the opportunity to have an objective outsider reflecting on the school's work with no hidden agenda.

Working as a critical friend in another education system was clearly a challenging activity and one that was full of learning. "Working as a Critical Friend in N.Z. made me realise I could take nothing for granted", said Ruth Winterson, Head of Neston High School. "I had to constantly question my assumptions, I had to question everything." One other secondary Cheshire headteacher presented her conclusions to the whole staff and Board of Trustees of the host school. Her report was published and received a very appreciative welcome. But there were other incidental gains too. A Maori principal taught the children of his host primary school to do the Haka before a local inter-school football match. The unsuspecting visiting team were so taken aback that they were three goals down in the first ten minutes!

Sources and suggestions for further reading

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* Earlier conference paper versions of these articles are available on the LfL website: www.educ.cam.ac.uk/lfl

Contacting LfL about critical friendship

If you would like to discuss how LfL can assist you through critical friendship, or how LfL can support your development as a critical friend, contact Kate Myers on myersk@fsnet.co.uk or Janet Gibson on jg323@cam.ac.uk.

If you would like to discuss any of the points made in this edition of Inform, request more detail or further references, please contact Sue Swaffield on ses42@cam.ac.uk.

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