Becoming a Critical Friend

Introduction to the Role

Congratulations! You have been invited to participate as a critical friend in recognition of your extensive professional experience and your highly developed personal qualities. For the purpose of the project - Principals as Stem Leaders (PASL) - a critical friend is defined as:

"...someone who is encouraging and supportive, who also provides honest and often candid feedback. A critical friend is someone who agrees to speak truthfully, but constructively, about areas for improvement, problems, and emotionally charged issues."

It is anticipated that your critical friend role will vary depending upon principal needs. Cluster principals and critical friends are responsible for negotiating the specific processes that work best for their cluster. The way in which the cluster works with their critical friend(s) will be independent of the researcher(s) so that principals can discuss aspects of their participation confidentially with their critical friend.

The role may take up to 2 hours per week throughout the school team in which the principal(s) is/are undertaking PASL professional learning and the school term immediately thereafter. It is likely that regular meetings/contact will be made with the principal or cluster of principals, in either online mode (e.g. Skype), by telephone or face-to-face. In situations where a face-to-face meeting is desirable, it is important to alert the PASL team to this and the extent of your need to travel. Limited financial support for travel in addition to incidental expenses may be available for critical friends located > 50 km from the relevant schools.

Critical friends will act in a voluntary capacity and will need to complete a University of Tasmania Volunteer Worker Checklist. It is expected that critical friends will adhere to the University of Tasmania Behaviour Policy. Non-compliance with this policy will result in exclusion for the program at the discretion of the PASL Directors. Participation of critical friends will be covered by the insurance of the PASL lead university.

The benefits to you by participating as a critical friend will vary according to your current role(s) and interests. Critical friends who are also current principals in schools, can align their participation with the expectations of the Australian Professional Standards for principals. Involvement in the project would enable them to:

- Participate in professional learning focussing on the role and activities of critical friends;
- Be part of a professional learning community of critical friends involved in the PASL project;
- Contribute to a national, principal focussed project in STEM education
- Improve and/or enhance their own capability in: STEM education, leading STEM education, and acting as a critical friend;

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1 The Glossary of Education Reform: https://www.teachingchannel.org/blog/2015/01/14/building-a-culture-of-collaboration
• Engage as critical friends for their own professional development;
• Develop potential partnerships with schools beyond those for which they are a PASL critical friend, higher education institutions, and/or associations (e.g., ASPA, APPA).

About this Professional Learning Module

This module is designed to help you prepare for, structure and reflect on your role as a critical friend. It is divided into four parts (1) Establishing Credibility and Trust, (2) Understanding the Context, (3) Promoting Engaging and Reflective Conversation, (4) Facilitating and Sustaining Cultural Change. Each part includes learning objectives, a short discussion and an activity. Part one (Establishing Credibility and Trust) should be completed before meeting your principal friend. Each part can be completed in 30 minutes with a total of two hours commitment to complete the learning module. The preparation of this module has drawn on the literature for critical friends, mentors, coaches and professional companions. Critical friend remains the most appropriate term for your role although strategies and skills draw from wider literature. Principal friend is the term used in the module to refer to principal(s) you are both supporting and challenging.

Establishing Credibility and Trust

Learning Objectives

Clarify expectations of the critical friend relationship
Explore strategies for developing a trust relationship

Discussion

Volunteering as a critical friend is an opportunity for you to ‘pay forward’ your hard-earned professional experience and wisdom. Your school-based principal friend will want to know that you have ‘walked the walk’ and have faced similar leadership challenges even though you may have worked in a different context. You want to share just enough of your career story to establish your credibility but take care not to set yourself up as ‘guru’ with all the answers. You may wish to share a brief version of your resume with your colleague. You may also like to share a powerful learning incident from your own experience. Sometimes an experience of failure or disappointment can be particularly valuable if it leads to an important insight or understanding.

Remember the focus of your critical friend relationship will be the goals and aspirations of your principal friend. You will act as a companion and guide on the leadership learning journey, ‘walking respectfully’ rather than ‘telling how’. You want to convey an authentic commitment to assist your principal friend to become the best leader they can be. It means listening with sensitivity and humility. It means leaving one’s ego at the door.

As in all effective and rewarding relationships, there must be a deep level of trust to establish and sustain a relational bond. Trust can be conveyed through words and actions.
Making an unqualified commitment to confidentiality and being clear and honest about one’s expectations and availability is a good start. By careful listening, asking probing questions and offering thoughtful feedback you can convey your support for them as a person as well as your understanding of their issues as a leader. In a sense you are responding on two levels: transactional and transformational. The transactional level focuses on technical skills and knowledge and helping your colleague on the outer journey of learning the leadership role. The transformational level addresses the inner journey of personal knowledge and insight to become a wise leader. You want your colleague to feel safe and comfortable enough to share personal doubts and concerns. Your role is not to be a therapist but rather to provide a sounding board and an outside perspective. Sometimes you will reach the limits of your own experience and you may call upon your wider professional network for assistance in terms of specific technical skills and knowledge. In some instances, you may recommend strategies such as relaxation, time out or referral to a counsellor or physician.

Learning Activities

To help in establishing clear expectations for your role you may wish to ask your principal friend to complete and share with you the brief proforma entitled ‘Goals and Expectations for Leadership’. There is also a proforma for you to help clarify your expectations of and commitment to the role of critical friend entitled ‘Becoming a Critical Friend’. You may chose to share this with your principal friend.
Proforma: Goals and Expectations for Leadership

The role of your critical friend is to support you to achieve your personal and professional goals as a school leader. Your role is complex and challenging and demands cultural change. The change journey will be problematic and contested. Your critical friend has ‘walked the walk’ of a school leader. They have a wealth of experience to share. To ensure they are best able to help you it is important to clarify your personal and professional goals for leadership development. Sharing and discussing your goals is an opportunity to develop a relationship of trust with your critical friend.

What qualities, skills and knowledge do you value in a leader? To inspire your thinking reflect on the attributes of most effective leaders you have known. Alternatively, think how you would like to your leadership described by a close colleague at the end of your career.

What aspects of leadership do you find most challenging?

What support would you most value from your critical friend? How would you describe your readiness/ openness to change?

From your perspective, what are the necessary conditions for a relationship of trust in terms of safety and confidentiality?

What is your preference for the mode and frequency of communication with your critical friend?
Proforma: Becoming a Critical Friend

It may be helpful to complete these questions before you meet your principal friend. They can help to clarify your thinking about the role and structure your initial conversations. As the relationship develops it may be useful to reflect again on the questions and revise or expand your responses on the basis of your experience as a critical friend.

Reflecting on your own professional career, identify people and events that proved instrumental in your development as a leader. Are you able to identify any key attributes, behaviours or experiences that you might apply in your critical friend role?

What strategies will you employ to establish credibility and promote trust in the critical friend relationship?

What challenges or difficulties, if any, do you anticipate?

What is your preferred mode of communication? What time commitment can you make to the relationship?
Understanding the Context

Learning Objectives

Identify the strengths of the current school culture
Identify the champions and support for cultural change

Discussion

Your principal friend will have developed, or be in the process of developing, a profile of the school. A positive start to your relationship would be inviting the principal to share this with you. You will be demonstrating your understanding of the importance of context, you will also be able to demonstrate your listening and questioning skills. Importantly, it will offer some insight to the principal’s perception of the breadth of their leadership role. Roles will vary by individual principals, by school, by local community and across state boundaries. Ideally, leadership development should be in step with whole of school development and the goals of cultural change. The PASL project aims to improve the culture of STEM learning and teaching. Working with the principal to identify the champions for change, existing strengths and potential obstacles will begin to map out a change process.

School leadership is concerned with the lives and futures of young people, the hopes and aspirations of their families and wider community, and the well-being and career progression of staff. It is complex, contested and demands an intensely moral leadership. It can be overwhelming. The role of the critical friend is to ensure the principal does not lose sight of the broader picture and does not become distracted by urgent, vocal and marginal interests. The critical friend can encourage strategic thinking and challenge the principal to ‘think outside the square’ when confronted with ‘wicked’ problems. Challenging questions can be confronting but they should not be judgemental. Your goal is to encourage the principal to be self-aware and reflective. At times you need to exercise the ability to hold back and let your colleague learn for themselves. This can be frustrating when you are confident you have the answer. A lesson learned through experience is often more powerful and convincing than a solution gifted from a friend.

Sometimes principals and school staff are unaware of the strengths of their school community. Through questioning and observation, a critical friend can often point out pockets of excellence that have gone unnoticed or taken for granted. These undervalued strengths can suggest the focus for expansion and improvement. You can use appreciate inquiry as a means of identifying strengths and conveying confidence in your principal friend. Such questions focus on what is working well, what has been successful, and what has been achieved. These sorts of questions are particularly helpful when the conversation begins to focus on the negatives, the problems and the obstacles to change.

Learning Activity

Invite your principal friend to share the school profile with you. Use reflective questioning to ensure that you understand the issues that the principal has identified. For example, I
understand that you are concerned that some of your teaching staff are not appropriately qualified to support STEM learning – is that correct? Provide positive feedback whenever appropriate. You may wish to comment on the comprehensiveness of the profile or the insights that the principal conveys when discussing staff. Use appreciative inquiry to ask positive questions such as: What aspects of the current school culture contribute to a sense of pride and achievement? How are school achievements celebrated in the wider community? Which staff members have demonstrated a readiness for change? What are the achievements of your student leaders? What are the strengths of your local community? Consider the options for direct observation. Is there an opportunity for you to observe a learning session, a staff meeting or an open day event?

Promoting Engaging and Reflective Conversation

Learning Objectives

Explore strategies to promote a learning conversation
Use structured reflection to gain insight and meaning

Discussion

The critical friend relationship may involve observation but always involves conversation. To ensure the conversation focuses on learning it may be necessary to agree on some familiar ‘ground rules’. The following characteristics support a positive conversational learning space. They can also structure a shared reflection at the end of a conversation – How did we go? Is there room for improvement? You may have other conversational attributes that you wish to add. The important message is to ensure that the conversation it focused on learning within a safe and respectful space.

Diagnostic for a learning conversation

1. Focus on the topic at hand.
2. Listen without interruption.
3. Demonstrate respect for diverse viewpoints
4. Accept a commitment to shared problem solving
5. Be willing to speculate or brainstorm
6. Be willing to ‘suspend belief’ for novel or unfamiliar suggestions
7. Respond thoughtfully to probing questions
8. Progress thinking towards an outcome

Conversations with your principal friend will be most engaging when they focus on the lived experience of leadership and are directly relevant to leadership goals. Encourage your principal friend to act as journalist and capture a brief synopsis of the day to day learning experiences or incidents as they occur. This can be in the form of a factual account of who, what and where – no more than 100 words and just enough to capture the essence of the event. An incident might be an issue with a staff member, a disruptive student, or a complaint from a parent. It can also be something positive and worthy of celebration – a
student who has overcome significant obstacles and achieved, a staff member who is grateful for your time and advice, a community outreach event that is very successful. All such incidents are rich in learnings.

The first thing to explore is personal feelings – anger, frustration, joy, excitement? What does it mean for self-understanding of the leadership role. The role of the critical friend is to explore the incident and related emotional response with probing but not judgmental questions, validate and support the principal friend’s conclusions where appropriate or suggest alternative viewpoints. Encourage the principal friend to explore the possible impact of the incident on other players.
## Activity

Reflective Exercise (Principal Friend)

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>Your response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incident</td>
<td>Provide a factual account of a leadership incident noting who, where and when in 100 words or less</td>
<td></td>
</tr>
<tr>
<td>Feelings</td>
<td>Describe your emotional response to the incident</td>
<td></td>
</tr>
<tr>
<td>Meaning</td>
<td>What does the incident and your response mean for your leadership identity</td>
<td></td>
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<tr>
<td>Validation</td>
<td>Discuss the incident and your reflections with your critical friend or a trusted colleague. Seek validation but also be open to alternative interpretations and learning.</td>
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</tbody>
</table>
**Activity**

**Reflective Exercise (Critical Friend)**

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<tr>
<th>Task</th>
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<th>Your response</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incident</td>
<td>Provide a factual account of a critical friend conversation or observation in 100 words or less</td>
<td></td>
</tr>
<tr>
<td>Feelings</td>
<td>Describe your emotional response to the incident/conversation</td>
<td></td>
</tr>
<tr>
<td>Meaning</td>
<td>What does the incident and your response mean for your role as a critical friend</td>
<td></td>
</tr>
<tr>
<td>Validation</td>
<td>Discuss the incident and your reflections with a trusted colleague. Seek validation but also be open to alternative interpretations and learning.</td>
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**Facilitating and Sustaining Cultural Change**
Explore action research as a means of maintaining focus and improvement
Encourage the use and expansion of a professional network

Action research describes a process of continuous improvement focused on practice. Following on from involvement in the PASL project, and your support as a critical friend, you may wish to ensure that your principal friend is able to sustain a positive learning environment for STEM education. Culture describes an interconnected web of relationships. Like all relationships it demands time and consideration it if it is to remain positive and strong. Action research offers a simple and structured means of managing the change culture through incremental improvement, review and evaluation. It supports a ‘learning conversation’ around the school culture and continuous improvement.

Encourage your principal friend to expanding their professional network as an effective means of tapping into specialised expertise and diverse experience. It can also be an enjoyable on a social level. To some extent your professional network expands naturally as your career progresses. You retain friends and associates from your days as a tertiary student, you maintain friendships developed in previous teaching positions and you make new professional contact by attending conferences and professional development seminars. Sometimes a helpful contact is secured quite by accident – a neighbour or a friend of a friend. Social networking sites such as ‘Linkedin’ make it easier to keep in touch with professional contacts that may have moved interstate or overseas. It is also an opportunity to seek out specialised expertise and request contact and support.

As a critical friend with a recognised role in educational leadership you enjoy the benefits of an extensive professional network. There may be the opportunity for you to share some of your contacts or facilitate networking for the benefit of your principal friend. Leadership can be lonely. It is always helpful to seek advice and support from a trusted colleague. A frank conversation with an understanding and supportive colleague can be a boost to personal well-being and a renewal of professional commitment

Activity
Introduce the action research cycle (reflect, plan, implement action, observe, reflect) as a strategy to link your conversations and provide continuity to your discussions with your principal friend. Your conversations can focus on reflection and planning. Your principal friend can implement an agreed action and observe the impact. There may also be the opportunity for you to participate in the observation. Subsequent conversations then reflect on those observations, revise plans and repeat the process.
Annotated Bibliography


The author examines his intervention as a coach with three different teachers at the same school in the USA. He is working in the area of English as a second language and focusing on early career teachers rather than experienced teachers. Nevertheless, his use of reflective practise, descriptions of his coaching conversations and the challenges he encounters are very relevant to the critical friend role. He also summarises the requisite supports to optimize impact of the coaching role and identifies critical questions and potential areas of future research. This could be inspiring for any participants who are interested in developing a conference paper or publication based on their experience of the critical friend relationship.


Leoni Degenhardt was a principal and then an educational consultant in Australia. She coined the term ‘professional companioning’. The article focuses on supporting leaders and emerging leaders in schools. Although she endeavours to distinguish professional companioning from other approaches such as mentoring, coaching and critical friends, there is considerable overlap and her deep understanding of the complexity of the principal’s role and the importance of preparation and support for leadership is evident throughout the article.


This is a conference paper outlining a proposal for post graduate qualitative research examining the impact of a critical friend intervention at a three-campus secondary school north of Melbourne. It is included here to indicate the potential scholarly contribution of your role and contribution as a critical friend. Marcela Heurta’s thesis was completed in 2014 at the University of Melbourne.


Sue Swaffield describes an international project (including Australia) where a critical friend was attached to each participating school. Over time school colleagues acted as critical friends to one another. The project fostered networking within and across schools. The article focuses on dialogue which she describes as “a very particular form of conversation involving the exchange of ideas and the search for meaning and common understanding, quite different in form and purpose from casual chat or combative debate” (p.328)

In this article Sue Swaffield evaluated a 3-year national program in England that provided a designated school improvement partner (SIP) to every school. While the role was portrayed as a critical friend, some participants experienced the relationship as a mechanism for surveillance and discipline with SIPs more concerned with data than discussion. It is included here to underline the importance of trust, authenticity and confidentiality in the critical friend relationship. Unlike the SIPs you are not required to report on the performance of the school or principal. Your role is to focus on supporting the principal friend’s goals and aspirations.

Additional support

This module was developed by Dr Gail Dennett, an external consultant to the PASL project. You can contact her by email gaildennett@gmail.com or by phone 0408 997 240 if you have questions about the learning materials or concerns regarding your critical friend role.