

Critical Friends: A Process Built on Reflection

Introduction

The Critical Friends process focuses on developing collegial relationships, encouraging reflective practice, and rethinking leadership. This process is based in cooperative adult learning, which is often contrary to patterns established in work environments. It also addresses a situation in which many leaders find themselves – trained to work as independent units; certified as knowing all that is needed to know; feeling like the continuation of professional learning is not essential to the creation of an exciting, rich, learning environment; and that they are simply supervisors in the leadership role.

Critical in the context of the group is intended to mean “important” or “key” or “necessary.” Those who have used this process have found that many leaders are clumsy at being “critical.” They have further discovered that many leaders are trained to talk around and avoid difficult issues, not carefully confront them. The Critical Friends process provides an opportunity both to solicit and provide feedback in a manner that promotes reflective learning.

Background:

The Annenberg Institute for School Reform at Brown University first developed the Critical Friends model for collegial dialogue. It is currently in use by an estimated 35,000 teachers, principals, and college professors in over 1,500 schools. In July 2000, the National School Reform Faculty program, which currently houses Critical Friends Groups and coordinates the training for Critical Friends Coaches, relocated to the Harmony School Education Center (HSEC) in Bloomington, Indiana.

As originally developed, the three “occasions” for reflection using the Critical Friends protocol are: (1) peer observations; (2) tuning a teaching artifact using the Tuning Process; or (3) consulting about an issue using the Consultancy Process. Each activity in the Critical Friends group contains elements of careful description, enforced thoughtful listening, and then questioning feedback – which may well be the basic elements of reflection. The feedback arrived at through the discussions also has been grouped in these ways: “Warm” feedback consists of supportive, appreciative statements about the work presented; “Cool” or more distanced feedback offers different ways to think about the work presented and/or raises questions; and “Hard” feedback challenges and extends the presenter's thinking and/or raises concerns. In general, this process utilizes time limits and agreed-upon purpose and norms help reduce interruptions in discussion and the rush-to-comment approach that our busy lives seem to promote.

The basic format for collegial dialogue is the same for each protocol: facilitator overview; presentation of observations, work or issue; clarification questions; feedback/discussion by participants (discussants); presenter reflection; debriefing of process. The questions and issues that presenters offer typically spring from feelings of concern, from moments in work without closure, and from issues they have not been able to find a solution through solitary thinking. The focus in our workshop will be on the Consultancy Process.

There are three roles in the Critical Friends process: facilitator, presenter, and discussants. The group can vary in size from four to seven people.

Group Member Roles

Facilitator:

Reviews the process at the outset, even if everyone is familiar with it. Sets time limits and keeps time carefully. Participates in discussions but is on the lookout for others who want to get in conversations. Adjusts time slightly depending on participation. May end one part early or extend another, but is aware of the need to keep time. Reminds discussants of roles, warm and cool feedback, and keeping on topic that the presenter designated. Leads debriefing process and is careful about not “shorting” this part. Is careful during the debriefing not to slip back into discussion.

Presenter:

Prepares an issue for consultancy. Is clear about the specific questions that should be addressed. Unlike most discussions of this nature, the presenter does not participate in the group discussion. Sits outside the group and does not maintain eye contact during the discussion but rather takes notes and gauges what is helpful and what is not. Later, is specific about the feedback that was helpful.

Discussants:

Address the issue brought by the presenter and give feedback that is both warm (positive) and cool (critical). The feedback should be given in a supportive tone and discussants should provide practical suggestions.

The “Consultancy” Process

The consultancy process allows colleagues to share issues confidentially and seek suggestions for positively overcoming or managing them. Consultancy creates opportunities for colleagues to find ways collaboratively around the obstacles and barriers that often limit or stifle effective action.

The process works best in smaller groups (4-7 people) where colleagues can feel comfortable sharing complex issues. Presenters share an issue, and members of the Critical Friends group offer “warm” and “cool” feedback, talking to each other not to the person who presented the issue. The presenter sits out of the group, listening, taking notes, and deciding what has been useful. The actual process (with maximum time allotted) follows.

Step One: Facilitator Overview (3 minutes)

- Review process
- Set time limits

Step Two: Presenter Overview (5 minutes)

- Share issue
- Provide context
- Frame key question for specific consideration

Step Three: Probing or Clarifying Questions (5 minutes)

- Group members ask more questions to learn about the issue
- Reminder, this is not a time to give advice or get into the discussion

Step Four: Discussant's Group Discussion (12 minutes)

- Group discusses issue (both warm and cool)
- Presenter is silent, taking notes
- Group addresses possible suggestions related to the issue

Step Five: Presenter Response (5 minutes)

- Presenter responds to group feedback

Step Six: Debriefing (5 minutes)

- Facilitator leads discussion, critiquing the process

References:

Appleby, J. (1998). *Becoming Critical Friends: Reflections of an NSRF Coach*. Providence, RI: The Annenberg Institute for School Reform at Brown University.

Cushman, K. (May, 1998). *How Friends Can Be Critical as Schools Make Essential Changes*. Oxon Hill, MD: Coalition of Essential Schools.

Bambino, D. (March, 2002). Redesigning Professional Development: Critical Friends. *Educational Leadership*, 59 (6), pp. 25-27.

Note: Other articles and materials were used to create this document; unfortunately, many of the materials used in this compilation did not have identifying information and therefore it was impossible to cite the original source.

Resources:

Annenberg Institute for School Reform <http://www.annenberginstitute.org/>

Critical Friends Groups at the National School Reform Faculty, which is a professional development initiative of the Harmony School Education Center in Bloomington, Indiana <http://www.nsrffharmony.org/>

Preparing an Issue for Consultancy: A Guide for Presenters

Not sure if you have any issues to present...

Ever wonder if you took the appropriate action?

Challenged by a particular employee and not sure how to proceed?

Looking for fresh ideas or a different approach to a challenging dilemma?

Not sure how to follow-up with an issue that needs to be addressed?

Have you recently been “stumped” by a situation?

These are precisely the issues that you could bring to the “Presenters” table through the Critical Friends Consultancy process.

Framing the Issue:

It is important to provide the discussants with enough information to discuss effectively and create solutions for the issue you are presenting. As you prepare your issue, consider including the following:

- Context in which the issue presents itself – does this situation come up in department meetings, or is this related to a philosophical disagreement in a particular discipline
- Important components surrounding the case – past history between the actors, or personnel structures that affect your ability to act
- If there is a meta issue looming behind the issue you present, it would be useful to share that with the discussants
- Your actions and/or reactions about the issue
- What you would like the group to discuss or the outcome you seek from the discussants – alternate suggestions, reinforcement for your actions, identify potential obstacles for you, etc.

Preparing to Present:

Consider bringing notes to the meeting at which you present. Remember that you only have five minutes to present your issue. Discussants do have five minutes to clarify but that is really time for them to get a better idea of the scenario. It is very important to let the group know what you want to get as a result from their discussion.

Following Your Presentation:

Listen carefully; take notes. Often the discussants will try to bring you back into the group, but it is more useful if you are able to distance yourself from the discussants so that you can capture all the information discussed. Hold yourself back from making judgments during the discussion as this might affect your ability to hear all the ideas and feedback.

For the Presenter Response:

This time portion is your opportunity to respond to the group discussion. This is not the time to continue the discussion with you involved. This is an opportunity for you to summarize your impressions of the discussion. Consider all the information gathered and identify which ideas might be useful and which ones you are unlikely to pursue.