

Conceptualizing the Role of 'Critical Friend' within the
Context of School Improvement

by

Shannon Leppky

A Thesis submitted to the Faculty of Graduate Studies of
The University of Manitoba
in partial fulfilment of the requirements of the degree of

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Abstract

The concept of ‘critical friend’ models premised on school improvement theory, was examined in this study through a triangulation of the findings that engaged four ‘critical friend’ models (Dunne, Nave & Lewis, 2000; Earl & Lee, 1998; Steigelbauer et al. 2005; Swaffield, 2002) and the researcher’s experience as a ‘critical friend’. Through this process, a social paradigm (Capra, 1996) of the role of ‘critical friend’ emerged. In this Participatory Action Research, secondary school teachers, principals and school division personnel were invited to share their experiential model of the role of ‘critical friend’. All agreed that a relationship of trust between ‘critical friends’ and school personnel was most important. Teachers identified activities with ‘critical friends’ as enabling them to experience clarity about their work. Principals identified activities with ‘critical friends’ as leadership development for teachers. School division personnel who enacted the role of ‘critical friend’ described it as a dialectical process. Overall, participants’ described the role of ‘critical friend’ as a facilitator of adult learning. Examination of the role of ‘critical friend’ within nested networks (Capra, 1996) and in consideration of social spaces (Green, 2005) presents a more theoretically grounded foundation for a ‘critical friend’ model in which educators can experience transformational learning for school improvement.

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CHAPTER ONE: THE RESEARCH CONTEXT

This qualitative, Participatory Action Research (PAR), pursued the question, what is the social paradigm (Capra, 1996) of the role of ‘critical friend’ in school improvement? To create a social paradigm of the role of ‘critical friend’ in school improvement, two questions were considered.

- What are the important elements that define the role of ‘critical friend’?
- What are the contextual factors required for the role of ‘critical friend’ to be effective?

Situated within a large urban school division in Manitoba, Canada, the historical context of this research was a partnership between the large urban school division and the Manitoba School Improvement Program (MSIP) from 2002 to 2007. During that time, I was the MSIP consultant working within this school division and enacted the role of ‘critical friend’ for high schools in collaboration with school division personnel known as the Critical Friends Team (CFT).

In this study, data was collected in focus groups and analyzed within the conceptual framework informed by systems thinking (Capra, 1996; Senge, 1990) and social constructivism (Cullen, 1999; Gergen, 2001; Green, 2005; Hirtle, 1996; Jones & Brader-Araje, 2002). As the data was collected and analyzed with consideration of the nested networks within the living system (Capra, 1996) in which the role of ‘critical friend’ operated, a social paradigm of the role of ‘critical friend’ emerged. Consideration of the ‘spaces’ (Green, 2005) in which the role of ‘critical friend’ exists allowed for the examination of the social construction of knowledge created through the ‘critical friend’ process.

The exploration into the role of ‘critical friend’ begins in this chapter with a review of the context and background for this research. This includes an overview of the school effectiveness (Creemers & Reezigt, 2005; Lezotte, 1991) and school improvement (Earl, Ali, & Lee, 2005; Fullan & Hargeaves, 1991) literature. The school improvement and school effectiveness literature were important contributions to the background because both the school improvement and the school effectiveness literature influenced the evolution of MSIP, an intermediary school improvement organization. Established at the end of the intensification versus re-structuring era (Fullan & Stiegelbauer, 1992) and still engaged with schools and school divisions in 2007, the manner in which services have been provided by MSIP to schools has changed over time. The evolution of the services delivered by MSIP was included to situate the research within the present day context of this intermediary school improvement organization. Another important aspect of the context was my role as the researcher who was the MSIP consultant for this school division. A reflection of my experience and understanding of the role of ‘critical friend’ in school improvement is the final contribution to Chapter One.

It is important to note that adult learning was an organizing feature of the research. Referencing the work of Stoll, Fink and Earl (2003), Earl, Ali and Lee (2005) suggest that school improvement is “fundamentally about learning – learning for students, learning for teachers, for school leaders and for the organization” (p. 160). The research process provided an opportunity for high school and school division personnel to share their perceptions, understanding, beliefs and vision of the role of ‘critical friend’ as experienced through the process. Capturing this learning was a way of celebrating a practice that for some of the high schools, originated prior to 2002. It also provided an opportunity for me to reflect upon and examine the practice of the role of ‘critical friend’

as I enacted it and how others perceived it. Through the research process, individuals within high schools, the school division and MSIP had the opportunity to organize and re-organize the social paradigm (Capra, 1996) in which the role of ‘critical friend’ lives.

The thesis continues in Chapter Two providing an overview of the definitions of ‘critical friend’ (Costa & Kallick, 1995; Earl & Lee, 1998; Stiegelbauer et al., 2005; Swaffield, 2005) as found in the school improvement literature. In addition to this, the conceptualization and operationalization of three models of ‘critical friend’ (Dunne et al., 2000; Stiegelbauer et al., 2005; Swaffield, 2002) are presented in addition to the ‘critical friend’ model enacted through the services delivered by MSIP consultants (MSIP, 2005b). The review of the literature on ‘critical friend’ demonstrates other fields in which ‘critical friends’ abide. This is followed by the conceptual framework, which was informed by systems thinking (Capra, 1996; Senge, 1991) and social constructivism (Cullen, 1999; Gergen, 2001; Green, 2005; Hirtle, 1996; Jones & Brader-Araje, 2002) that permits us to differentiate the “role” from the “social context”.

In Chapter Three, the PAR methodology and how it informs the research process is discussed. Focus groups were the method used for collecting data. This is discussed in more detail in Chapter Three. The results are presented in Chapter Four. They are presented first in an overview organized in relation to systems thinking followed by the themes as they inform the important elements and the contextual factor required for the effective enactment of the role of ‘critical friend’. The conversation in relation to the findings is continued in Chapter Five, in which themes from the four models of ‘critical friend’ (Dunne et al., 2000; MSIP, 2005b; Stiegelbauer et al., 2005; Swaffield, 2002) are identified and compared to themes identified by this research. This is followed by an analysis of the findings in relation to systems thinking and social constructivism. The

thesis concludes in Chapter Six with a summary, conclusions, limitations, recommendations and final thoughts.

The Importance of Context

The importance of context is well documented in the field of school improvement research (Earl, Freeman, Lasky, Sutherland & Torrance, 2002; Harris & Chapman, 2004; Lee, 1999; Reezigt & Creemers, 2005; Wikeley, Stoll, Murillo & De Jong, 2005). As Fullan & Stiegelbauer (1992) suggest, “educational change. . .is a sociopolitical process” (p. 4). It is difficult to understand the complexity and the influence of the work within which a school or school division engages without an understanding of the context. An effort was therefore made to adequately describe the multiple levels of context relevant to this research. Context in its broadest sense is presented through an overview of the school improvement literature. The school improvement literature has informed the way in which MSIP Consultants have facilitated school improvement processes. This evolution has influenced the present day context of the school division partnership with MSIP. The chapter is therefore organized to present an overview of the school improvement literature, then MSIP’s evolution followed by the immediate context within which this research was situated. The chapter ends with my reflection on the role of ‘critical friend’.

The Context of School Improvement

It is important to consider the evolution of school improvement theory and practice because the present is informed by the past. Over time, the way in which educators have facilitated school improvement within the education system has evolved. The eras of educational change history of “adoption (1960’s), implementation failure

(1970-77), implementation success (1978-82) and intensification vs. re-structuring (1983-90)” (Fullan & Stiegelbauer, 1992, p. 5) provide insight into how change was facilitated within education and the successes and failures that were experienced as a result. In addition to this historical perspective of educational change, research by Hargreaves and Fullan in the early 1990’s identified strategies that could be used to facilitate school improvement processes. These two scholars are not only leading researchers in the field of school improvement, but also were two of the pioneers whose work influenced the mission and mandate of MSIP.

Situating MSIP with Hargreaves and Fullan

As previously stated, the larger context within which this research is situated is the school improvement literature. Scholars within the field of school improvement, Andy Hargreaves and Michael Fullan, respectively, were the first two chairs of the Education Advisory Committee (EAC), the advisory body of MSIP. Their research influenced the relationship between MSIP, an intermediary school improvement organization and public secondary schools in the early 1990’s. It is therefore important to identify their research as part of the historical context of this study.

In their examination of school improvement through the *What’s worth fighting for* trilogy (Fullan, 1988; Fullan & Hargreaves, 1991; 1996; Hargreaves & Fullan, 1998), systems thinking was used to examine the role of teachers and principals and their relationship with students and the community within the context of school improvement. The importance of teachers engaging in professional collaboration and the need for teachers to become change agents was identified as necessary to school improvement processes (Fullan & Hargreaves, 1991). Examining the different roles within the context

of schooling and the focus on collaborative relationships both within schools and between school and community is evident in the *What's worth fighting for* trilogy. In *Change Forces* (1993), chaos theory was used to acknowledge and examine the interplay of networks engaged in school improvement processes. As suggested by Overman (1996), new sciences such as "chaos theory. . .will unquestionably have an impact on the new administrative sciences" (p. 491). Using chaos and complexity theory, Fullan (1992a, 1992b, 1993) wrote extensively about educational organizational thinking. As expanded on below, this was a focus of his research as he examined school improvement using systems thinking.

Fullan viewed the challenge of the 1990's as dealing with "changes that affect the culture and structure of schools, [and] restructuring roles and reorganizing responsibilities" (Fullan & Stiegelbauer, 1992, p. 29). Culture (Fullan, 1993, 1995; Fullan & Stiegelbauer, 1992; Stager & Fullan, 1992) and structure (Fullan, 1993; Fullan, Bennet, & Rolheiser- Bennet, 1990; Fullan & Hargreaves, 1996; Fullan & Stiegelbauer, 1992) are dominant themes in his research. Fullan "use[d] structure in the sociological sense to include organizational arrangements, roles, finance and governance, and formal policies that explicitly build in working conditions that. . . support and press for improvement" (Fullan & Stiegelbauer, 1992, p. 88). He examined change at all levels of the education system from the classroom to departments of education, from the role of the teacher to the role of the superintendent (Fullan, 2001, 2003, 2005b; Fullan & Hargreaves, 1991; Fullan & Stiegelbauer, 1992). This comprehensive review allowed for the examination of roles in relationships to each other, and the influence of change in one part of the system on another.

“Culture is a structural phenomenon: [as] it describes those ideational and institutional structures that enable social co-operation” (Ney & Molenaers, 1999, p. 492). Moral purpose and change agency (Fullan, 1993; Stager & Fullan, 1992) are two concepts that inform a conceptualization of culture within school improvement. Within this conceptualization of school improvement culture, one without the other is ineffectual. Understanding the change process, described by Fullan (Fullan, 1993) as having change agency, without examining the “why” of change, which is encompassed in examining one’s moral purpose, can lead to futile and inconsequential ends. It is for these reasons that moral purpose and change agency need to work together (Fullan, 1993). The process of doing so informs an organization’s culture.

As identified above, the school improvement research in the 1990’s as identified in the work of Hargreaves and Fullan (Fullan, 1997; Fullan & Hargreaves, 1991; Hargreaves & Fullan, 1998), focused on the system of education. Studying the roles and relationships relevant to schooling was a primary focus. Studying the how and what of change within the roles and relationships was also important. It was this focus that informed the work of MSIP and as identified below, it was this focus that situates the mission and mandate of MSIP within school improvement research.

School effectiveness, school improvement and reform

At the start, the work of MSIP was shaped by both the school effectiveness and school improvement research (Earl, L., Torrance, N., Sutherland, S., Fullan, M., & Ali, A.S., 2003; Earl et al., 2005). While school effectiveness and school improvement have as a commonality the betterment of schools, there are significant differences as to what the two bodies of research examine. It is therefore important to identify the differences

between the two. In addition to school effectiveness and school improvement, the work associated with the partnership between the school division and MSIP was informed by the school reform literature. A brief overview of school effectiveness, school improvement and school reform are presented in the following sections.

School effectiveness

As identified in the International Institute for Educational Planning (Scheerens, 2000) school effectiveness “refers to the performance of the organizational unit called ‘school’” (p. 18). In this body of research the school is the unit of change and the research seeks to identify what it is that effective schools are doing. The pursuit of school effectiveness researchers is to identify what makes schools more effective (Creemers, & Reezigt, 2005; Earl et al., 2005).

In the school effectiveness research, teaching and learning are identified as the primary purpose of schooling. Therefore, measuring success is done through the monitoring of student outcomes. What schools measure reflects what is valued and important to student learning (Lezotte & Bancroft, 1985). Through his research, Lezotte (1991) identified seven correlates that many schools have used in their efforts to become more effective. The correlates are: safe and orderly environment, climate of high expectations for success, instructional leadership, clear and focused mission, opportunity to learn and student time on task, frequent monitoring of student progress and home-school relations (Lezotte, 1991). It was argued that these correlates are critical because “they represent the leading organizational and contextual indicators that have been shown to influence student learning” (Lezotte, n.d., p. 4).

In the early days of this research, it was assumed that if one applies what the effectiveness research has shown works, it would result in school improvement (Creemers & Reezigt, 2005). While the school effectiveness research describes what to do, it does not describe how to do it. A limitation of this research is therefore that it does not describe the organizational process of becoming effective (Scheerens & Demeuse, 2005). This is a focus of the school improvement literature as described in the next section.

School improvement

School improvement research is based on the belief that schools need to find their own solutions for the problems and challenges they face, within their own context (Creemers & Reezigt, 2005). Identifying factors that make schools effective and assuming that those factors would allow all schools to be successful, is a simplistic view of change. Having a toolbox of strategies or a list of correlates will not guarantee that schools will experience success in their change efforts.

Based on the research of Earl et al., (2005) school improvement can be defined as “a systematic, sustained effort aimed at change in learning conditions and other related internal conditions in one or more schools, with the ultimate aim of accomplishing educational goals effectively” (p. 155). As suggested by Lee (1999) this has to be done using a variety of methods and strategies. Cousins and Earl (1995), cited in Lee (1999) suggest that “the purpose of school improvement is to enhance organizational learning capacity and generative and adaptive knowledge bases” (p. 158). This requires a focus on process and on learning for all those involved.

School improvement researchers examine how change is facilitated and problems are solved within educational practice (Creemers & Reezigt, 2005). This body of research

examines “what actually happens as people in schools try to make serious changes in how they operate, how they relate to one another and their students, and how they teach” (Earl et al., 2005, p. 156). School improvement researchers are therefore interested in the processes and influences of those processes when schools and entire systems undergo improvement efforts. It is focused on whether or not schools are managing change successfully (Creemers & Reezigt, 2005). In addition to the school improvement research, school reform initiatives have contributed to the educational improvement literature. The next section describes the differences within the reform literature and how that body of literature informed the work associated with the school division partnership with MSIP.

School reform

In addition to the school improvement and the school effectiveness research, the school reform research informed MSIP’s partnership with the school division in which this research was situated. As suggested by Young and Levin (1999), the term ‘reform’ has numerous definitions. It is found in the educational change literature to describe work at the school, district and government levels (Barber & Fullan, 2005; Fullan, 2005a). There are also government mandated and directed reforms that are political in nature, meaning they are “driven by the political apparatus of government rather than by educators or bureaucrats” (Young & Levin, 1999, Origins of reform section, ¶ 1).

There are a number of examples of large-scale reform strategies that have been politically motivated. They include but are not limited to the *New Directions* reform mandate in Manitoba by the conservative government initiated in 1994 (Young & Levin, 1999); National Numeracy and Literacy Strategy in England, introduced in 1997 (Earl & Fullan, 2003; Leithwood, Jantzi, Earl, Watson, Levin & Fullan, 2004); Alberta’s

education reform movement that began in 1994 corresponding with the election of Premier Ralph Klein (Young & Levin, 1999), Secondary School Reform (SSR) in Ontario that began in 1997 (Earl & Fullan 2003) and more recently the Ontario government's strategy to improve literacy and numeracy which began in 2003 (Campbell & Fullan, 2006). All of these reform initiatives were politically motivated and had a significant influence on the culture of education within their political jurisdiction.

As an intermediary school improvement organization, the influence of MSIP is not that of government-mandated reforms such as those identified above. The partnership between MSIP and the large urban school division was informed however, by some of the research that came from the examination of these reform initiatives. In particular, the school division partnership with MSIP was influenced by the research on leadership (Fullan, 2004; Leithwood et al., 2004), lateral capacity building and vertical relationships between schools and the school division (Fullan, 2005d). This is evident within the overview of the history of MSIP and the description of the school division/MSIP partnership discussed later in this chapter.

Summary of school effectiveness, school improvement and school reform

As discussed above, there are differences between school effectiveness and school improvement research. School effectiveness researchers are interested in the factors or the correlates (Lezotte, 1991) that makes schools effective. The criticism of this research is that consideration is not given to the process of making a school more effective (Scheerens & Demeuse, 2005). School improvement researchers (Earl et al., 2005; Fullan & Hargreaves, 1991; Hargreaves & Fullan, 1998) recognizing the limitations of the school effectiveness research are interested in the organizational change process. How do

schools go about changing? What are the processes involved and how do they impact people?

While the school effectiveness and the school improvement research influenced the engagement of MSIP with schools in the early 1990s, it was the process of improvement that became the focus of the organization. As stated by Fullan (1998) in the preface to the 1998 Evaluation of the Manitoba School Improvement Program (Earl & Lee, 1998);

Despite a good deal of research describing effective schools *once* they have improved there is surprisingly little known about *how* to get there. Over the past seven years the Manitoba School Improvement Program (MSIP) has been engaged in exactly that question. Using external stimulus and support, MSIP has invited teachers and others at the school level to join in a collaborative effort to make changes that benefit students. (p. i)

In addition to the school effectiveness and the school improvement literature, the school reform literature influenced the partnership between the school division and MSIP in which this research occurred. In particular, the references to leadership (Fullan, 2004; Leithwood et al., 2004), and lateral and vertical capacity building (Fullan, 2005d) provided a focus for school improvement efforts within the school division partnership with MSIP. One of the ways in which this was addressed was through the role of 'critical friend'. The engagement of secondary school teachers and administrators and school division personnel in the 'critical friend' process spanned three networks within the system. The role of 'critical friend' enabled the facilitation of conversations not only across a network but also across multiple networks within the system. It is the role of

'critical friend' as enacted through the three networks within a school division that is the focus of examination in this study.

MSIP – Following the Intensification versus Re-structuring Era

The examination of school improvement by Fullan during the 1990s with a focus on culture (Fullan, 1993, 1995; Fullan & Stiegelbauer, 1992; Stager & Fullan, 1992;) and structure (Fullan, 1993; Fullan, Bennet, & Rolheiser- Bennet, 1990; Fullan & Hargreaves, 1996; Fullan & Stiegelbauer, 1992) was informed by the research from the intensification and re-structuring era. Insights from this era include the need to pay attention to how change is initiated, the need for both pressure and support during the process of change, that individuals often need to experience a change in behaviour before they experience change in beliefs and that ownership will increase as the process evolves (Fullan, 1992). These insights informed a culture of change (Fullan, 1993, 1995; Fullan & Stiegelbauer, 1992; Stager & Fullan, 1992) that influenced the work of MSIP. This culture of change identified educators as learners (Fullan, 1993, 1995; Fullan, Bennet, & Rolheiser-Bennet, 1990). The ability for individuals to articulate the complexities of change and to then move through change requires the personal capacity to explore and to ask questions. As in the process of transformational learning, examining one's moral purpose in education requires the engagement in critical self-reflection through which "an individual revises old or develops new assumptions, beliefs or ways of seeing the world" (Cranton, 1994, p. 4).

The role of educators as learners is a factor in the school improvement process. The ability to be inquiry-minded is an aspect of the culture of change (Fullan, 1993, 1995; Fullan, Bennet, & Rolheiser-Bennet, 1990). The ability for school personnel to

collaborate, to provide opportunities to be inquiry-minded and to identify and work towards a common vision is found throughout the school improvement literature (DuFour & Eaker, 1998; Eaker, DuFour, & DuFour, 2002; Fullan, 1993; Lambert, 1998; Mitchell & Sackney, 2000; Stager & Fullan, 1993; Stoll et al., 2003). When teachers model learning for each other and for students, the likelihood of a school community becoming a learning community is enhanced. As described by Mitchell and Sackney (2000) “ a learning community consists in a group of people who take an active, reflective, collaborative, learning-oriented, and growth-promoting approach toward the mysteries, problems and perplexities of teaching and learning” (p. 9).

Schools and districts have used the work of DuFour and Eaker (1998), and Eaker, DuFour, & DuFour (2002) as a recipe for creating common visions and plans that guide their work. The authors argue that professional learning communities are “the *most promising strategy* for sustained, substantive school improvement” (DuFour & Eaker, 1998, p. xi). The ideology of a professional learning community is premised on collaborative learning and shared ownership for creating and fulfilling the vision, mission and goals of a school (DuFour & Eaker, 1998). This is a departure from the traditional, top-down management structure within which schools have worked for a long time. Transitioning to the collaborative model of a learning community requires deliberate effort and an awareness of the shift in roles and responsibilities of everyone involved.

In their examination, Mitchell and Sackney (2000) identify three spheres in a learning community. The three spheres are personal, interpersonal and organizational capacity. The first sphere, personal capacity, is in reference to the active and reflective construction of knowledge. This is the work individuals engage in as learners. The second sphere, interpersonal capacity, refers to collegial relations and collective practice. These

relations and practice are informed by and inform the culture and structures within a school. The third sphere, organizational capacity is “concerned with building structures that create and maintain sustainable organizational processes” (p. 14). Organizational capacity not only enables organizational learning it is also necessary to sustain the practices within which learning communities engage. The authors suggest the three spheres are nested, mutual and recursive. Operating within these three spheres require that educators have an openness to change and a willingness to learn within the context of these spheres.

The work of Stoll, Fink and Earl (2003) also references the importance of inquiry and learning within the process of school improvement. Their work describes schools as situated within nested systems. The importance of educational leaders’ ability to see the interconnection between the levels of the system in order to facilitate ongoing improvement in their school is essential. The ability of school leaders to assist their staff in conceptualizing and moving through the complexity of change is required if schools are to continually improve. This requires educators to be inquiry-minded learners.

School improvement history informing MSIP

The roots of MSIP are deeply embedded in the work of Fullan and Hargreaves (Fullan, 1997; Fullan & Hargreaves, 1991; Hargreaves & Fullan, 1998). While the school effectiveness and reform research influenced the work of MSIP in the early stages as an intermediary school improvement organization, it was the process of school improvement that became the work within which MSIP staff engaged. As identified in the previous section, within the process of school improvement, adult learning is fundamental (Fullan, 1993, 1995; Fullan, Bennet, & Rolheiser-Bennet, 1990). The engagement of educators in

the process of inquiry and collaborative learning is well documented in the field of school improvement research (DuFour & Eaker, 1998; Eaker, DuFour, & DuFour, 2002; Fullan, 1993; Lambert, 1998; Mitchell & Sackney, 2000; Stager & Fullan, 1993; Stoll et al., 2003). It is this process of school improvement, paying attention to collaborative processes and adult learning, that has remained constant within the work of MSIP and schools. While with whom MSIP consultants have worked in the school system has evolved over time, as identified below, the processes of inquiry and collaboration have remained constant.

The Context of MSIP

In 1991, the Walter and Duncan Gordon Foundation (WDGF), a Canadian charitable foundation located in Toronto, Ontario, invested in secondary school improvement. This supported their mission, as found on the homepage of their website of supporting public policies that are “designed to foster the continuing evolution of a dynamic and independent Canada” (Walter and Duncan Gordon Foundation). In supporting secondary school improvement, the Foundation wanted to find a province in which they could influence the education of students who were at risk of not succeeding in school, where educators were open to the involvement of the Foundation and would help support their efforts, and where the Foundation felt this would be manageable within the budget they had allocated (Earl & Lee, 1998). They found this in Manitoba at a time where the province was governed by a Conservative government that as Henley and Young (2001) argue, was creating a neo-liberal market democracy undoing much of the work in previous years, which had worked towards creating a pluralist moral democracy. Some of the defining factors of a neo-liberal market democracy being “efficiency,

accountability and choice” (Henley & Young, 2001, p. 309) were contrary to the ideals of school improvement and the community development approach of MSIP.

The work began with a small staff consisting of a full time coordinator and a part time evaluation consultant. An Education Advisory Committee (EAC), which included representatives from the WDF, Manitoba Education and Training and leading researchers in the field of school improvement, was formed to direct the work. The first EAC chair was Andy Hargreaves followed in 1993 by Michael Fullan.

Engagement with schools began when middle schools and secondary schools within Winnipeg, were invited to submit proposals with a project focus that they felt had the potential to impact the learning experiences and outcomes of all students, with a particular focus on students ‘at risk’. Funding was approved primarily to support professional development opportunities, release time to provide the opportunity for teachers to collaborate and funds for materials such as professional books. Along with grants, consultative support was provided from the coordinator and the evaluation consultant.

A mission statement was developed. It was to “improve the learning experiences and outcomes of secondary school students, particularly those at risk, by building schools’ capacities to engage students actively in their learning: (MSIP, 1998, p. 1). In 2005 the mission statement was revised. The revised mission statement reads, “MSIP promotes educational equity and social justice by collaborating with public secondary schools and school divisions to build their capacity to improve student learning and engagement (MSIP, 2005).

The organization evolved. In 1997, MSIP incorporated as an independent, non-profit, non-governmental intermediary organization. The WDF funding diminished and

the organization was forced to find alternative means of funding. At the time of this study, funding is comprised of grants from the Manitoba Department of Education, Citizenship and Youth, matched funding from schools and school divisions, foundation grants, corporate dollars and anonymous donors.

The organizational structure also evolved. At the time of incorporation came the need for a Board. The MSIP Board membership includes representatives from the K-12 public education system, community organizations and business. Board responsibilities include the financial well being of the organization and policy development. The work of the Board supports the organization along with the work of the EAC. The primary function of the EAC is to provide direction to the programming MSIP provides. That is, how and with whom MSIP staff works to fulfill the organization's mission.

All school submissions and school division partnership agreements are reviewed by the EAC for the purpose of providing feedback to schools and school divisions and to make decisions on grant requests. It should be noted that the EAC membership has changed over time. At the time of this study, the EAC membership consists of representatives of the K-12 education system and community representatives from Manitoba. The EAC membership does not include representatives from the WDFG or educational organizations outside the province.

The staff compliment has changed and increased. At the time of incorporation in 1997, MSIP hired a full time Executive Director. At the time of this study, an Executive Director who reports to the Board of Directors and works collaboratively with staff to fulfill the organization's mission leads the organization. The evaluation consultant continues to provide evaluation support although this role has changed to become a support to the organization and not directly to funded schools. Schools receive

consultative services from a small group of MSIP consultants. As has been identified in the evaluation of MSIP, MSIP consultants provide 'pressure and support' (Earl & Lee, 1998; Earl et al., 2003) to schools. They do so through their role as a 'critical friend' (Earl & Lee, 1998; Earl et al., 2003).

Evaluations of the work of MSIP were commissioned by the WDGF. The initial report, *Lessons learned: the Manitoba school improvement program* (Fullan, Lee & Kilcher, 1995) was followed by the 1998 Overall Evaluation conducted by Earl and Lee (1998). Earl, Torrance, Sutherland, Fullan and Ali (2003) conducted the Final Evaluation Report, which was released in 2003. Throughout the evaluation process, student learning data such as graduation rates and English and Math provincial exam results were collected. Perceptual data was gathered through surveying teachers and students. Interviews were conducted with the principal or key informant and focus groups were conducted with teachers and students (Earl et al., 2003).

The findings from the 1995 evaluation were categorized into a ten-point school improvement framework. The ten points are: to focus on student learning, curriculum and instruction, to reach out and mobilize the involvement of teachers, students, parents and community, to connect to the world outside the school and to broaden leadership. The final points of the framework are to look in and engage in ongoing inquiry and reflection, work towards creating coherence and integration among school goals and initiatives and increase the school's internal capacity for change (Fullan et al., 1995). MSIP's School Improvement Framework continues to act as a guide for the work MSIP consultants engage in with schools and school divisions.

How and with whom MSIP staff work has evolved over time. As noted earlier, the EAC initially approved funding of multi-year school projects. As the organization

evolved, the EAC approved proposals that focused on the whole school. This began the transition from schools submitting project proposals, to schools submitting their school plans. Further to that, consideration was also given to the consideration of working with not only individual schools but also working with schools within their divisional context.

In response to this new perspective, during the 1996-1997 school year, a tri-divisional initiative was struck. This initiative involved a network of three urban school divisions. It provided the opportunity for superintendents and high school personnel from the three school divisions to network about their school improvement work. This initiative was not sustainable as it became difficult to manage the tensions involved when working with three school divisions each with a distinct culture (Earl et al., 2003). Each of the three school divisions continued to express interest in partnering with MSIP, which resulted in the approval of three individual school division partnerships. This was a shift in the work of MSIP as MSIP consultants were now engaging with school division personnel in addition to personnel in the high schools.

From the initial granting of school projects, to supporting school plans to supporting school plans within a context of school division partnerships, the intent of the work of MSIP evolved “to go deeper around issues such as student voice, inquiry-mindedness, strategic planning and dealing with the challenges of supporting schools through the change process” (MSIP, 2004). This evolution was informed by the consultant’s work in the field, the MSIP Overall Evaluation (Earl et al., 2003), and the Going to Scale Literature Review (Proactive Information Services, 2003). At the time this research was conducted, MSIP partnerships involved five school divisions and a few high schools independent of a school division partnership. The partnerships are cost-shared between the school division and MSIP. Each partnership is unique in terms of MSIP

consultative support. The MSIP consultative support to a partnership is dependent upon the focus of the partnership, the internal capacity of the school division to support this work and the focus of the work. Within school division partnerships the MSIP consultants support work at the school and school division level for the benefit of all students and their learning. An overview of the partnership involved in this research is described in the next section.

The Context of the Partnership between MSIP and the School Division

This research was conducted within the context of a MSIP school division partnership from 2002-2007. The partnership began during the initial year of this newly amalgamated school division. Previous to 2002, one of the two school divisions had had a partnership with MSIP. This meant that some of the high schools had had been engaged with MSIP previous to 2002 and some had not.

As found on the website for the school division, in November 2006 divisional staff in this large urban school division include a chief superintendent, four assistant superintendents, directors, supervisors, and consultants. The organizational chart illustrates the hierarchy using five levels. (Appendix A – School Division Organizational Chart). At the top is the Board of Trustees. Reporting directly to them is the Chief Superintendent and CEO of schools. Situated in the third level down are the assistant superintendents followed by the directors at the fourth level. The supervisors and consultants are at the fifth level together with school administrators.

School division personnel serve eight high schools and thirty-one elementary schools that in turn serve just over 15,000 students. The demographics within the school division are varied. There are schools situated in middle and upper middle class

neighborhoods as well as schools situated in neighborhoods with a lower socioeconomic status. Students who have English as an additional language (EAL) and an Aboriginal student population contribute to the membership of the school communities. EAL needs are a result of both refugee and immigrant populations. The school division provides opportunities for learning in both English and French immersion settings.

The partnership agreement between the school division and MSIP had two priorities. First, I as the MSIP consultant worked directly with high schools to assist them in school planning processes. Second, I worked with student services and curriculum consultants to support their work with schools. Although there were two priorities, more of my time was spent working directly with schools. My involvement with student services and curriculum consultants involved their engagement as part of the Critical Friends Team (CFT).

The budget for this partnership had both a cost-sharing component and a fee for service component. The cost-shared component of the partnership agreement involved grants to the high schools and a central budget line. The school grants were intended to support school teams as they created, implemented and reflected upon their work in relation to their school plan. The grants were less than \$10,000.00 per school and were primarily used to support professional development fees and substitute costs to cover time spent collaborating with school-based colleagues as well as networking opportunities within and outside the school division. The central budget line supported the networking opportunities among the high schools as well as centrally based evaluation of the partnership. The fee for service component of the budget paid for the MSIP consultant time to the high schools and the school division.

The partnership had four key components. The first partnership component was my support to schools, facilitated through my role as an MSIP Consultant. The second component was the Critical Friends Team (CFT) which consisted of school division personnel and I. The third component was the High School Teams Meetings (HSTM), a networking opportunity which took place three times a school year. The fourth component was a Book Club, a networking opportunity where people gathered to talk about educational change and school improvement research. The four components of the partnership are discussed below.

Role of MSIP Consultant within the Partnership

My role as the MSIP consultant within this school division partnership was one of providing ‘pressure and support’ as a ‘critical friend’. Time was spent working with individual high schools as they created and implemented their schools plans. This involved working collaboratively with school teams to plan and facilitate conversations, staff workshops or retreats, providing feedback on surveys or focus group discussion guides, reviewing data with schools, problem solving with formal and informal leaders and providing research and literature related to their school priorities or to facilitating change. The role of ‘critical friend’ was facilitated by the CFT for four years of the five-year partnership. During that time, I worked closely with school division personnel to assist them in developing their skills as a ‘critical friend’ and to plan and facilitate the ‘critical friends’ meetings with schools. In addition to that, it was my role to plan and facilitate the HSTM and the Book Club. The planning was informed by feedback from the high school teams.

In many ways, I was the gatekeeper for school improvement processes for the high schools in this school division due to my role in initiating and facilitating not only the 'critical friend' process but also the larger networking opportunities among the eight high schools. All of this was possible due to the access I had in the school division made possible due to my working relationship with one of the assistant superintendents. This assistant superintendent and I met regularly to talk about the progress of the school improvement initiatives with high schools in the school division.

Critical Friends Team (CFT) – A Component of the Partnership

From September 2002 until June 2006, I worked with school division personnel to organize and facilitate the CFT meetings with high schools. Over time, the CFT grew in membership to include up to eight school division personnel in the 2005-2006 school year. This affected my role in that I was now working with a group of seven school division personnel that included consultants, supervisors and directors. It also meant that instead of the consultant, supervisor and myself visiting all eight high schools two times a year, as had occurred in the previous three years, there were three CFT sub teams that met with a maximum of three high schools two times a year. I was a member of all three CFT sub teams and therefore continued to visit all eight high schools.

The CFT met with high school teams two times a year to engage in a reflective conversation about the school's work in relation to the school plan. This required the CFT to meet throughout the year to talk about their role. In addition to talking about their role as 'critical friends', time was required to plan the CFT meetings with the high schools. During those meetings members of the CFT reviewed the school plans and identified questions they felt might assist schools in celebrating their successes as well as probe

their thinking about what they were doing, why, how they were doing it and how they knew it was making a difference.

High School Teams Meeting (HSTM) – A Component of the Partnership

High school teams met three times a year at the HSTM. The purpose of the HSTM was to develop a professional learning community in which formal and informal leaders from each of the high schools could talk with one another about the work they were doing in their schools in relation to their school plan. Meetings occurred during the afternoon at the school division office. Each session began with lunch, which was paid for from the central budget line of the school division/MSIP partnership. Schools were encouraged to bring students as part of their teams, which occurred occasionally. It was strongly recommended that one administrator from each high school attend the session. In most HSTM there was at least one administrator from each of the high schools in attendance.

The meetings began each year with the opportunity for school teams to share their school plans and talk about the work associated with their plans. There were often commonalities across the school plans and the issues schools faced. These commonalities informed the agenda for the remaining two meetings. Meeting topics included but were not limited to, how to use data, leadership challenges, involving community in your school and examining school culture.

The HSTM were coordinated and facilitated by myself and at times members of the CFT. While there was a professional development component, equally as important was the opportunity for school teams to talk with each other, as well as have time together as a team to discuss issues and to plan. The school team format that existed in each high

school was one way to broaden leadership within the high schools and the HSTM were one way to support it.

Book Club – A Component of the Partnership

The Book Club was an informal networking opportunity that had an open invitation to all high schools and the ‘critical friends’. The opportunity to engage in professional reading can provide access to research and ideas that can be used in the classroom and in the school (Stoll et al., 2003). When the high school teams were asked at a HSTM in the fall of 2004 if there was interest in forming a Book Club, there were approximately seventeen teachers, administrators and school division personnel who signed up. Over time the Book Club membership grew to a maximum of approximately twenty-five people. While not everyone could attend each meeting, everyone on the Book Club list received the books. I choose the books in consultation with members of the CFT and the Book Club. The books were paid for through the central budget line of the partnership. The Book Club read authors such as Dufour, Dufour, Eaker and Karhanek (2004); Stoll, Fink and Earl (2003); Kohn (1999); and Hargreaves and Fink (2006).

Using the Reform Literature to Frame the Partnership

The school improvement work in this school division was well supported at the high school level from 2002 to 2007. This included my support to schools as the MSIP consultant, the ‘critical friend’ process facilitated through the CFT, the HSTM, and the Book Club. All of these processes provided ‘pressure and support’ for high schools to talk about and reflect upon what they were doing and how they were doing it. These supports were used to assist high school educators to strengthen their ‘change agency’ (Stager &

Fullan, 1992). 'Change agency' defined as being self-conscious about the nature of change, as being appreciative of its semi-unpredictable and volatile character and as explicitly being concerned with the pursuit of ideas and competencies for coping with and influencing more and more aspects of the process toward some desired set of ends (Stager & Fullan, 1992).

'Change agency' as defined by Fullan (Fullan, 1993; Stager & Fullan, 1992) identifies four core capacities evident in the processes facilitated through the school division/MSIP partnership. They are personal vision building, inquiry, mastery and collaboration. The process of teachers developing a personal vision (Fullan, 1993; Stager & Fullan, 1992) which requires them to reflect upon and articulate why they do what they do was supported through the supports offered through the school division/MSIP partnership. In addition to that, the CFT meetings and the dialogue that occurred at the HSTM provided processes by which teachers, administrators and school division personnel could bring to a conscious level the values, beliefs and habits each person possesses. This, together with an examination of the changes occurring in the world beyond the school, were examined as opportunities were provided for formal and informal high school leaders to engage in inquiry.

Learning does not necessarily result in a change in behaviour (Stager & Fullan, 1992). Mastery is the action that stems from personal vision building and inquiry. The ongoing meetings with the 'critical friends' and the sharing that occurred during the HSTM provided some 'pressure' for individuals and teams to put into action what they had learned through the process of developing a personal vision and the inquiry process. Knowing there would be conversations in which teachers and administrators could talk

about the work with which they were engaged was a source of motivation to follow through with plans amidst the busy schedules that schools endure.

Collaboration occurred within schools and across schools through the processes facilitated as a result of the school division/MSIP partnership. Collaboration requires determined effort. If time spent collaborating is not seen as helpful it can block change (Fullan, Bennet & Rolheiser-Bennet, 1990). Consideration of how collaboration is used and who is collaborating is therefore important. During the school division/MSIP partnership attention was paid to how collaboration was facilitated. As the findings show, while there were suggestions for improving the processes, the HSTM and the Book Club were described as valuable collaborative processes.

A focus of this school division/MSIP partnership was paying attention to issues of leadership (Fullan, 2004; Leithwood et al., 2004), lateral capacity building and vertical relationships between schools and the school division (Fullan, 2005d) as identified in the reform research. The CFT process brought together not only school division and school personnel (vertical relationships) it also brought together school personnel within a school and across schools (lateral relationships). Without having first worked together as a school team, it would be difficult for a school team to engage in the CFT conversations as well as the conversations with educators from other schools. Without the involvement of school division personnel in the CFT process, the scope of the conversations about school improvement and school planning would have been limited. The influence of the reform literature and in particular the examination of 'change agency' (Fullan, 1993; Stager & Fullan, 1992) informed the processes used within this school division to support the school improvement work within which the high schools were engaged.

Sustainability of School Improvement Beyond the Partnership

One of the issues in relation to school improvement is sustainability. As the school division plans for the sustainability of the work associated with the MSIP partnership it is important to learn from what has been accomplished or in some cases not accomplished. One of the criticisms regarding the CFT process has been that some of the CFT members have found that the CFT process is separate from their roles and responsibilities within the school division. Therefore, the question is, how can the 'critical friend' process become sustainable within the school division? Is it possible for the role of 'critical friend' to become part of the roles and responsibilities of school division personnel?

Through the duration of the partnership, data was collected about the CFT process. In June 2004 a focus group was conducted with representatives from the high schools to talk about the strengths of the process, the benefit of the process, and ways the process could be enhanced. This was facilitated by Proactive Information Services, an independent research firm. In spring 2005, high school principals and vice-principals were asked to complete an anonymous survey to provide feedback on the CFT process and the HSTMs. I created this survey and with the help of the administrative support at the school division office, the responses were kept confidential. Reflective conversations were also facilitated by me with lead teachers and administrators from the schools to inform the service the CFT was providing and how the CFT process could be more effective.

The school division/MSIP partnership has been participatory action research (PAR). Throughout the partnership, there was ongoing feedback from the high schools and the school division personnel about the processes that were used to assist high

schools in their school planning and school improvement efforts. This research, a formal research project conducted by me, the MSIP consultant, to complete my Masters of Education degree, is a continuation into the process of inquiry that has become integral to the school improvement work within this school division. With the conclusion of the school division/MSIP partnership in June 2007, this research will provide the basis of a report I will write for the school division. The focus of the report will be the role of 'critical friend' and how that role could be facilitated within the school division beyond its partnership with MSIP. The school division personnel may consider this report as they examine their continued school improvement and school planning initiatives.

The Researcher's Context – A Reflection on my Role as 'Critical Friend'

My reflection on the role of 'critical friend' completes the context for this research. Examining the role of 'critical friend' has been both an academic and personal process. During this research process, I have worked towards moving from my lived experience as a 'critical friend' to a researcher of the role of 'critical friend'. By sharing my reflection on the role of 'critical friend' it allows me to not only to contribute to the context of this research, it has brought to a conscious level, the need to objectify the role of 'critical friend' in order to study it. It is no longer me living it but "sensing" and "presencing" (Senge, Scharmer, Jaworski and Flowers, 2004) it. It has been a transformational learning process.

Learning through an Apprenticeship in 'Critical Friend'

In 1997, my second year as a MSIP consultant, I became a 'critical friend'. I began working with two high schools in an urban school division as their 'critical friend'.

I did not know a lot about being a ‘critical friend’. Having come from an MSIP network school, my experience was that of receiving ‘critical friend’ feedback.

I learned through watching and doing. My training as a ‘critical friend’ included joining the MSIP Program Coordinator in school meetings and paying attention to how she probed and listened. After each session, there was always a de-briefing session, usually during the car ride on the way back to the office. While those de-briefing sessions were worthwhile, learning to become a ‘critical friend’ continued to be a struggle. Exactly what was it that a ‘critical friend’ does? Since there was no course to attend and the literature on ‘critical friend’ was limited, the only option was to learn through an apprenticeship in critical friendship.

It was early in my career. In my mid 20s, I was conscious of my age and the fact that I did not have a Bachelor of Education degree. I wondered about my credibility with teachers, administrators and superintendents. My “*meaning scheme*, the constellation of concept[s], belief, judgment and feeling” (Mezirow, 1994, p. 223) which shaped my understanding of education included my perceived expectation that in order to be credible by teachers one must be a teacher.

While I was not a teacher, I had worked in a high school for six years, the last three of those six years as the school improvement coordinator. In becoming a ‘critical friend’ I relied on what I had learned during this time which was practical, school-based experience about school improvement and ways in which to facilitate change within a school. Prominent in the research at that time was the concept of ‘ready, fire, aim’ (Fullan, 1993). It is not always possible to know how the strategies one employs will influence the context and the people within that context. Therefore, learn as much as you

can about what it is you want to achieve, try it, learn from it and then refine it. That is what I did within my term as a school-based school improvement coordinator.

As a result of my experience as a school-based school improvement coordinator and my interest in adult learning within that process, I pursued and completed a Certificate in Adult and Continuing Education (C.A.C.E.) through Continuing Education at the University of Manitoba. This experience provided opportunities to consider how school improvement and adult learning intersect. As Merriam and Clark (1991) suggest, supported by the work Boyd and Myers (1988); Mezirow (1990); and Daloz (1986); “adult learning is characterized by the *transformation* of experience rather than the accumulation of knowledge” (p. 46). The idea of adult learning being transformative was important on two levels. First, my role as a ‘critical friend’ with high schools was to assist them in engaging in school improvement, which included collecting data to identify needs, establish strategies to try and address those needs and assisting them in evaluating their efforts. Through this process, opportunities for dialogue and professional development could facilitate transformative learning experiences.

Second, if adult learning is transformative learning based on experience, it would be important to consider how I facilitated transformative experiences for others as I worked with them through the process of school improvement. Facilitating an environment in which learners can engage in critical reflection, stimulating transformative learning through challenge and support and encouraging and assisting adult learners, the three critical aspects of transformational learning (Cranton, 1994) would need to be considered in my role as a ‘critical friend’. The responsibility of being a facilitator within the transformative learning process, through the role of ‘critical friend’ placed me in a position of power and trust. I therefore needed to consider the complexities

of that. As Cranton (1991) suggests, one's "role in transformative learning is a complex and sensitive one" (p. 198). This realization of complexity and sensitivity required me to think about what I was doing and why.

As my experience as a 'critical friend' continued, my understanding of school organization, the politics of schooling and school improvement processes grew. As this occurred, I became more purposeful about the questions I asked and what I listened for during 'critical friend' conversations with school teams. I became more purposeful as I became more aware of the fact that a lot of what I did as a 'critical friend' was assist people in identifying and examining their assumptions and beliefs about student learning and about the purpose of education. I came to understand that it was not necessarily about what I could "tell" people, but it was about the questions I asked that probed their thinking. What I was doing was engaging in and facilitating transformative learning in others. As Brookfield (1987) argued as found in Cranton (1991), "skilled critical questioning is the most effective means through which engrained assumptions can be externalized" (p. 197). This is what I was attempting to do, engage in critical questioning as people entrusted me with their time, their beliefs and their assumptions in relation to learning, education and their practice.

Learning through my Participation in a Critical Friends Teams (CFT)

In 1999, my journey began as a 'critical friend' alongside school division personnel. I was to be the MSIP consultant on a three person 'critical friends' team. The school division personnel I was to work alongside were experienced educators. They were passionate and knowledgeable and I was to be the one who was providing leadership in the 'critical friend' process.

Again, I was unsure about my credibility. I had not worked as a divisional employee before and therefore did not have that lens through which to operate. I did have knowledge and experience to share and that is what I did. I took the lead on developing the questions that we asked the high school teams during our semi-annual visits. I chaired the meetings with the school division personnel when we met as ‘critical friends’ as well as the meetings we had with school teams. As we learned how to be a ‘critical friends’ team the school teams reported that the ‘critical friend’ team conversations were useful, and my fellow ‘critical friends’ shared with me that this was a learning process for them. It was a learning process for me as well. My knowledge of the dynamics of the ‘critical friend’ conversations grew. I experienced increased confidence and knowledge about the issues schools were facing, school improvement processes and the relationship between a ‘critical friends’ team and a school. This transformative experience continued to shape my development as a ‘critical friend’.

From 2002 to 2007, I was involved with a Critical Friends Teams (CFT) that grew from three people to nine people including myself. It is through the structure of this CFT that this research took shape. The learning acquired through people’s experiences of the CFT process in this large urban school division, identified through this research, will continue to inform my learning about the role of ‘critical friend’. It will inform what I had learned from my previous experience which will be shared in the next section.

Lessons Learned

In reflecting back on my role as ‘critical friend’, I have brought to a conscious level some of the lessons I have learned about the role of ‘critical friend’. They will be shared in this section and include the following: I have experienced that the ‘critical

friend' process can be transformational; I have come to realize that relationships are key; central to relationships is trust; and the last one, the 'critical friend' must be credible.

The 'critical friend' process is transformational

The 'critical friend' process can be a transformational learning experience. Facilitating conversations in which adults articulate their knowledge, beliefs and values about learning, about their practice and about education, and challenging them to think beyond that which they already know, can result in dissonance, change and growth. However, learners need to be willing participants within this process. The context must enable individuals to risk talking openly about their values, beliefs and assumptions without the fear of negative consequences for themselves, professionally or personally.

Relationships are key

Relationships are a key in the 'critical friend' process. As a 'critical friend', you must earn the trust of those around the table in order to engage in celebration and exploration about the work that they do on a daily basis. Teaching is a solitary pursuit and the 'critical friend' process shatters that perception and invites people into relationship and dialogue about their craft. People cannot do that if they are not in a relationship of trust.

Building relationships involves valuing others' work. It is not necessarily about understanding the specifics of the curriculum someone is teaching or the specific challenges they have in the classroom. It is more about understanding that teaching young people is a challenging responsibility. Educating young people who have diverse experiences, abilities and needs requires skill, knowledge and time. Recognizing this

while encouraging someone to be critical about his or her own work is not only important but also necessary. People need to know that as their 'critical friend' you understand their situation.

Trust is non-negotiable

One cannot be a 'critical friend' without earning the trust of those to whom you are a 'critical friend'. Within a school division context, a 'critical friend' works with teachers, administrators and superintendents. The 'critical friend' must be conscious about what information she shares with whom. The 'critical friend' is not a conduit for information between levels in the system. The ability for a 'critical friend' to navigate within and between levels within a system requires trust. Without trust, a 'critical friend' cannot function successfully.

Times when trust can be an issue is when the 'critical friend' finds herself "in the middle". Meaning, when a teacher or group of teachers talk with the 'critical friend' about a situation in their school and the 'critical friend' is left with the decision as to whether or not this information needs to be shared with the administration and if so, how to do that. This can be difficult, as the 'critical friend' needs to maintain those relationships of trust. At the same time, it may be important to share that information. In these situations the 'critical friend' should try to think about the objectives she is working towards and do what she can to stay true to those. The best option is when a 'critical friend' can encourage people to share information with the respective person or group so that it is not the 'critical friend' breaking trust but people having conversations that often need to take place.

Trust is important if the role of 'critical friend' is to encourage people to reflect upon their "meaning schemes" (Mezirow, 1994). Educators have defined expectations and beliefs about what schools do and why they exist. Their activity within schools is influenced by their "meaning scheme". The role of 'critical friend' within a trusted relationship can begin to disrupt a person's "meaning scheme" of education, which can result in discomfort in the adult learner.

The 'critical friend' must be credible

A 'critical friend' is more credible if she can speak from experience or give examples by way of school stories. People value information and ideas from outside their classroom and their school. They want to know that the 'critical friend' knows about high schools and the issues they face. They also want to know that the 'critical friend' knows the research and can assist them as they need assistance, or can find someone who can. Providing that for people begins to connect them with the larger system of their school division, of educators in the province and sometimes beyond that.

Managing the conversation

When working with school teams, 'critical friends' often facilitate and manage conversations. One aspect of facilitating 'critical friend' conversations with school teams is to know when not to ask a question. The 'critical friend' may notice that someone came unprepared and is not easily participating in the conversation. There may be tensions within the group or between certain individuals. At those times the 'critical friend' needs to rely on her experience with groups. Asking the 'wrong' question can expose someone to the group. This may be exposing someone's lack of skill, lack of action, lack of

knowledge, or lack of trust, either of others or the process. While there are times when asking the ‘wrong’ question may assist an individual or the group in moving forward in their understanding of the changes they are experiencing in their school, sometimes it can result in tensions within the group. The ‘critical friend’ then needs to assist the group in working through the tensions either by diverting the topic elsewhere or to someone else, or by acknowledging the discomfort and talking through it.

Conclusions

Being a ‘critical friend’ is a humbling experience. As now a researcher of the role of ‘critical friend’, I realize there is still a lot to learn about it. Having been a ‘critical friend’ for almost a decade, I have had a lot of practice being a ‘critical friend’. But that does not mean I have a complete understanding of it. Through this research, I have had the privilege of working with my colleagues in this large urban school division in an effort to better understand the role of ‘critical friend’. Through this transformational process, I have attempted to peel back the layers in seeking a deeper understanding of a role I have had for a long time.

Professional Significance of this Study

This research contributes to the literature on school improvement and adult learning. It does so by introducing salient elements and contextual factors not found within the ‘critical friend’ models described in Chapter Two (Dunne et al., 2000; MSIP, 2005b; Stiegelbauer et al., 2005; Swaffield, 2002). In addition to that, examining the role of ‘critical friend’ within ‘spaces of influence’ (Green, 2005) introduced another lens through which to understand the ‘critical friend’ process.

Identifying Important Elements and Contextual Factors for the Effective Enactment of the Role of 'Critical Friend'

This research informs the school improvement research in relation to the role of 'critical friend'. This research further examined the contextual factors and important elements that are required for the effective enactment of the role of 'critical friend' and compared them to the contextual factors and important elements as identified in four 'critical friend' models (Dunne et al., 2000; MSIP, 2005b; Stiegelbauer et al., 2005; Swaffield, 2002). In doing so, themes were found within the four 'critical friend' models and themes were also identified through the research. The identification of themes through this research provides additional considerations of the salient elements and the contextual factors in which the role of 'critical friend' is facilitated.

Introduction of the Role of 'Critical Friend' within 'Spaces of Influence' (Green, 2005)

In addition to the introduction of salient elements and contextual factors, this research introduces the parallel characteristics of the role of 'critical friend' and the role of 'influential other' (Green, 2005). The 'spaces of influence' (Green, 2005) in which a 'critical friend' operates were explored. While this exploration is not complete, it does introduce another lens through which to examine the role of 'critical friend'. Conceptualizing the role of 'critical friend' as operating within 'spaces of influence' provides another way to define and examine the 'life process' (Capra, 1996) of it.

Chapter Summary

The purpose of this chapter was to provide the research context. In an effort to provide the nested layers of context, the chapter began with an overview of school

improvement research in the 1990s based primarily on the work of Fullan (Fullan, 1988; Fullan & Hargreaves, 1991, 1996; Hargreaves & Fullan, 1998). This provided an overview of a systems approach to school improvement with a focus on structure and culture. The evolution of MSIP was then provided to situate the present day partnership between MSIP and the school division within which this research occurred. In an effort to understand the immediate context of this study, an overview of the main tenets of the partnership between MSIP and the large urban school division were described. To complete the context, my reflection on the role of 'critical friend' was shared. Premised on the role of 'critical friend' facilitating transformational learning for educators, I shared my transformational experience as part of the reflective process of being.

In pursuing the social paradigm of the role of 'critical friend' through the examination of the important elements and the contextual factors required for the effective enactment of the role of 'critical friend', this research further examined issues relevant to culture and structure within the context of school improvement. In an effort to understand what the research is presently saying about the role of 'critical friend' it was important to look at other models of 'critical friend' to find out how this role is manifested in other contexts and what the research has said about it. Chapter Two therefore provides an overview of three models of 'critical friend' (Dunne et al., 2000; Stiegelbauer et al., 2005; Swaffield, 2002) and the MSIP model of 'critical friend' (MSIP, 2005b) which includes a more detailed review of the model involved in this research. Following this, Chapter Two describes the conceptual model providing the theoretical frame upon which this research rests.

CHAPTER TWO: MODELS AND A CONCEPTUAL FRAMEWORK

This chapter defines ‘critical friend’ (Costa & Kallick, 1995; Earl & Lee, 1998; Stiegelbauer et al., 2005; Swaffield, 2005) and provides an overview of four diverse ‘critical friend’ models within the context of school improvement (Dunne et al., 2000; MSIP, 2005b; Stiegelbauer et al., 2005; Swaffield, 2002). The purpose of engaging the four models of ‘critical friend’ is to demonstrate how this role performs in the school improvement literature (Dunne, Nave, & Lewis, 2000; Earl & Lee, 1998; Stiegelbauer et al., 2005; Swaffield, 2002). A detailed examination of the role illustrates that this role facilitates adult learning in school improvement (Costa & Kallick, 1995; Earl & Lee, 1998; Stiegelbauer et al., 2005; Swaffield, 2005). Following the overview of the four diverse models of ‘critical friend’, the conceptual framework for this research is presented.

Defining ‘Critical Friend’

Costa and Kallick (1995) have penned a definition of ‘critical friend’ commonly found in the school improvement literature. The definition states that a ‘critical friend’ is a trusted person who asks provocative questions, provides a different perspective on data to be examined, and offers critique as a friend to the person’s work. A critical friend is prepared to take the time to fully understand the context of the work and the outcomes that a colleague is working toward. A critical friend is an advocate for the success of that work (Costa & Kallick, 1995, p. 154).

Based on this definition, a ‘critical friend’ could be someone with whom a person works, such as a colleague in the same school. It could also be someone external to the school that assumes this role with an individual or a team of people. This definition

assumes an investment of time with the intended purpose of supporting and challenging another person's work. It does not take into account whether or not it is a voluntary role or a paid service.

Defining, 'critical friend', Swaffield (2004, 2005) draws on the definitions of Costa and Kallick (1995), the work of McDonald (1989), Stoll and Thomson (1996) as well as Brighthouse and Woods (1999). The resulting definition refers to someone external to the school, who assists educators in thinking through their work. 'Critical friends' assume the role of "helping schools make sound decisions, challenging expectations, patiently playing a role that is interpretative and catalytic, helping shape outcomes but never determining them, and alerting the school to issues often only half perceived" (p. 44). As suggested by Swaffield (2005) the "primary aim of a critical friend is seen as supporting improvement through empowerment, demonstrating positive regard for people and providing an informed critique of processes and practices" (p. 45).

Stiegelbauer et al., (2005) cite Costa and Kallick's (1995) definition as well as the work of Gordon (1999). They define 'critical friends' as "experienced volunteers from outside the school who lend their expertise, gather data, provide feedback, ask tough questions, and critique the effort" (Gordon, 1999, p. 51 found in Steigelbauer et al., 2005, p. 5). This definition is similar to those above but adds the dimension of volunteerism to the role.

The role of 'critical friend' within the context of MSIP is commonly associated with the term "pressure and support" (Earl & Lee, 1998; Earl et al., 2003; Fullan, 1992; Swaffield, 2003). Providing both 'pressure and support' when facilitating school improvement is important (Fullan, 1992). As suggested in the work of Fullan and

Stiegelbauer (1992), “pressure without support leads to resistance and alienation; support without pressure leads to drift or waste of resources” (p. 91).

The 1998 Overall Evaluation of MSIP provided a description of what the MSIP ‘critical friends’ did. The definition is similar to that found above. It states that ‘critical friends’ “provided an outsider’s eye, offered advice, asked tough questions, reinforced and praised good practice, lent a sympathetic ear, arranged training, supplied resources, and were there. . .when the schools needed them” (Earl & Lee, 1998, p. 90). By doing so, ‘critical friends’ provided both ‘pressure and support’ to schools.

“Critical friends are both critical (challenging critics) and critical (essential)” (Earl et al., 2005, p. 168). The Program Coordinator and an Evaluation Consultant who were the first MSIP ‘critical friends’ characterized their role as providing a service by

“giving genuine, long-term support to schools struggling to change; helping teachers stay aware of professional literature and best practice; offering professional and technical skills when schools needed them; asking difficult questions, such as “How will you know you’ve been successful?”; empathizing at moments of discouragement; prodding at moments of inertia; and celebrating at times of success” (Zimmerman & Lee, 1998, p. 26).

There are commonalities among the definitions described above. The characteristics of the role of ‘critical friend’ as found in the literature, are categorized in Table 1. This synopsis contributes to a social paradigm of the role of ‘critical friend’ in school improvement.

Table 1: Characteristics of the Role of 'Critical Friend'

Who are 'critical friends'?	What characteristics and expertise do 'critical friends' have?	What do 'critical friends' do?
<p>A 'critical friend' may be</p> <ul style="list-style-type: none"> • a colleague • external to the school <p>The 'critical friend' role may be</p> <ul style="list-style-type: none"> • a voluntary role • a paid service 	<ul style="list-style-type: none"> • Trustworthy • Patient • Able to offer critique • Empathetic • Knowledgeable of educational issues, practice and research 	<ul style="list-style-type: none"> • Ask provocative questions • Provide a different perspective • Offer critique • Take time to understand the context • Advocate (for the work) • Assist schools in making decisions • Challenge expectations • Play a role that is interpretative and catalytic • Assist in shaping outcomes but not determining them • Alert the school to issues they may not perceive • Mirror back to others • Lend their expertise • Gather data • Provide feedback

Table 1: Characteristics of the Role of 'Critical Friend' (continued)

Who are 'critical friends'?	What characteristics and expertise do 'critical friends' have?	What do 'critical friends' do?
		<ul style="list-style-type: none"> • Ask tough questions • Provide pressure and support • Provide an outsider's eye • Offer advice • Reinforce and praise good practice • Lend a sympathetic ear • Arrange training • Supply resources • Provide genuine long-term support • Provide professional literature • Empathize • Prod • Celebrate

The role of 'critical friend within the context of school improvement, is therefore one of inviting educators into dialogue to observe and articulate their own beliefs, biases and assumptions in reference to their work and the larger context of education. 'Critical friends' assist others in identifying and articulating the work that needs to occur and assist in the development and facilitation of a plan to achieve that. 'Critical friends' offer practical assistance in the process of school improvement. They do so by providing assistance in the areas of research, data collection, facilitation and planning.

The aspect of articulation as part of the role of 'critical friend' is not unlike Theory U as discussed in Senge, Scharmer, Jaworski and Flowers (2004). Theory U identifies three aspects that are required in the change process. The aspects are sensing, presencing and realizing (Senge et al., 2004). Sensing is the process of observing. 'Critical friends' assist others in the process of observing. They assist educators to observe that which they are doing and the influence that their work is having within the system of the school and on the larger system within which the school resides. As they engage in this process, 'critical friends' assist others in illuminating strengths and successes to be celebrated. Challenges can also be 'sensed' and by taking time to talk about the challenges, educators may acquire a greater degree of clarity.

Presencing requires time to "retreat and reflect" (Senge et al., 2004) upon that which has been observed. 'Critical friends' assist educators in the process of presencing. Through the process of reflecting on that, which has been observed, possibilities may emerge that educators may not have previously recognized. As Senge et al. (2004) suggest, "[w]hen we are presencing, it moves further, to arise from the highest future

possibility that connects self with whole. The real change . . . lies not in its abstractness but in the subtlety of the experience” (p. 87).

“Realizing” (Senge et al., 2004) is the point of decision making. After having done the work of ‘sensing’ and ‘presencing’, one is so in tune with the present and with the whole, that the decision that needs to be made is very obvious (Senge et al., 2004). It is as if there is no other decision because after taking time to ‘sense’ and to ‘presence’, the answer is there. It is this work and these endpoints on which the role of ‘critical friend’ can have a powerful influence.

Models of the Role of ‘Critical Friend’

The role of ‘critical friend’ as conceptualized within the field of school improvement is practiced through different models. A Google search on October 20, 2006 of the World Wide Web for “Critical Friends School Improvement” resulted in 7, 050,000 hits, which is a demonstration of the interest in and concern with this concept. The websites found in the search include those of the National Staff Development Council, Northwest Educational Leadership Library, National School Reform Faculty, Annenberg Institute, and various authors who have published articles on the topic of ‘critical friend’. In congruence with the definitions as listed above, the websites refer to various models of ‘critical friendship’ that assist educators in their improvement efforts. They include peer to peer, external consultant to school and Critical Friend Groups. In an effort to better understand how the various models inform the social paradigm of the role of ‘critical friend’, this chapter describes four diverse models of ‘critical friend’ (Dunne et al., 2000; MSIP, 2005b; Stiegelbauer et al., 2005; Swaffield, 2002).

Two of the four models presented in this chapter are practiced within the United States (U.S.) public education system (Dunne et al., 2000; Stiegelbauer et al., 2005). Another model is practiced in the British education system (Swaffield, 2002). And the last model described is practiced in the public education system within Manitoba, Canada (MSIP, 2005b) and is where this research is situated. The first of the two models found in the U.S. is the National School Reform Faculty (NSRF) Critical Friends Groups (CFG) (Dunne et al., 2000). This model originated from the Annenberg Institute of School Reform in 1995 and continues to be used as a professional development process within the U.S. education system in which peers become 'critical friends' to one another. The second of the two models found in the U.S. is the National Center for School Improvement (NCSI) - graduate student as 'critical friend' (Stiegelbauer et al., 2005). This model is situated at Texas State University, San Marcos. It provides doctoral students with the opportunity to work directly with schools as 'critical friends' supporting schools in their school improvement work. The model situated in Britain is the Local Education Authority (LEA) as 'critical friend' (Swaffield, 2002). The work of the LEA assists public schools in meeting LEA standards and supports their school improvement work. The fourth model found in Manitoba, Canada is the MSIP Consultant as 'critical friend' (MSIP, 2005b). This model is one of an intermediary school improvement organization working with public secondary schools providing 'critical friend' support to schools who have received MSIP funding for school improvement. Each of these four models will be discussed below. The descriptions of the NSRF, NCSI and MSIP models are organized by context, conceptualization, operationalization, impact and summary. Context, conceptualization and summary organize the overview of the LEA model.

NSRF Model – Critical Friend Groups (CFG)

The NSRF model is the only model of the four presented in this chapter in which teachers are ‘critical friends’ to one another. This section describes the context of this model, how it is conceptualized and operationalized. A summary of the impact of the CFG model as reported by Key (2006) suggests that while there is evidence of this model influencing professional learning, the evidence of its influence on student learning is still in question. The review of the CFG model begins with the context.

Context

The NSRF Critical Friends Groups (CFG) originated in 1995 at the Annenberg Institute for School Reform (AISR) at Brown University. The CFG process was created in response to the dissatisfaction of traditional professional development practices such as pre-planned workshops and motivational presentations that do not necessarily address specific participant needs. The desire was to identify a professional development practice that would focus on the teacher as learner and would give teachers the opportunity to define what they believed would improve student learning (Dunne et al., 2000). The development of the CFG was supported by McLaughlin and Talbert’s Stanford Study of the Context of Secondary School Teaching as well as Newman and Wehlage’s research on school restructuring (Dunne et al., 2000). In 2002, when the AISR funding had ended, NSRF was moved to the Harmony Education Center. Over the years, a growing national network of educators “has worked to deepen and sustain the impact of CFG on student learning, teacher practice and school culture” (National Reform Faculty - History).

Conceptualized

As identified above, CFG were created in response to a dissatisfaction of professional development activities. As identified on the NSRF website (<http://www.harmonyschool.org/nsrf/default.html>), CFG are premised on the professional learning community ideology where people share their vision, their beliefs and their practice with one another in an effort to improve student learning outcomes. It is a process of making one's practices public within a collaborative culture of inquiry. The intended result of the CFG model is to improve teaching and learning (National School Reform Faculty - Frequently Asked Questions, 2006).

As outlined above, CFG provide an opportunity for educators to come together on a regular basis, with a trusted group of peers for the purpose of examining their work and the student work that results from it (Bambino, 2002; Cushman, 1996). The process provides the opportunity to make what is implicit, explicit (Swaffield, 2002). The intent is that this in turn will impact student learning and engagement.

Operationalized

CFG are conducted with the facilitation of a trained facilitator or coach who understands group norms and the process of dialogue. The CFG coach or facilitator is chosen by the group and is a trusted peer. The facilitator is trained through the NSRF network to assist the group in reviewing student and teacher work and providing feedback to one another (National School Reform Faculty - Frequently Asked Questions, 2006). The training not only provides the opportunity to learn the art of facilitation, it creates an awareness of other groups and enables the facilitator to provide resources and networking

opportunities for the CFG members within their group (National School Reform Faculty – Program Description, 2006).

In monthly meetings, CFG establish learning goals for their students. Subsequently, group members work together to develop more effective teaching strategies, examine student work and the curriculum. They consider school culture and issues concerning equity that may have an impact on student achievement. Participating in peer observation on a regular basis is part of the process after trust has been established between group members (National School Reform Faculty – Program Description, 2006).

CFG are found throughout the United States. They have varying memberships and foci. It appears from the literature that while membership varies, the constant is the process of inquiry that is central to the CFG process. As stated by Emm (2005), “CFG work has always been about taking an inquiry stance” (p. 2). It “is not defined by who is in it, but by the work the group is engaged in” (Emm, 2005, p. 19).

Based on inquiry the CFG process can be used to examine any aspect of one’s practice whether it is instructional, administrative or consultative. It is based on cooperative adult learning with processes that contain “elements of careful description, enforced thoughtful listening, and then questioning feedback” (Critical Friends: A process built on reflection, 2006). There are three processes that define the work of a CFG. They are peer observations, the Tuning Process, the purpose of which is to “tune a teaching artifact” and the Consultancy Process, the purpose of which is to present a problem or issue and ask for ideas, opinions and possible solutions. (Critical Friends: A process built on reflection, 2006).

As previously stated, CFG can be found throughout the United States with varying memberships and purposes. For example, in New York, this process is used to create

professional learning communities of principals and assistant principals (Lehman, 2005). In Chattanooga, Tennessee, 17 assistant principals met together on a regular basis to talk about their role as instructional leaders (Anderson, 2003). In Los Angeles, the CFG process includes teachers, principals and district personnel. While perhaps not referred to as CFG, the work involved “consistently focuses on building the capacity of site principals, teachers and schools to reflect upon their practices to improve student learning by using the collaborative strategies and tools” (Quinn, 2002). The work of teacher inquiry through the CFG process is supported in Florida (Emm, 2005) and in Texas (National School Reform Faculty – Texas, 2006) by local universities.

CFG may also have a particular curricular focus. For example, as part of the Literacy Network in Colorado, the Colorado Public Schools provided training for CFG that included a focus on literacy (Shanklin & Quate, 2005). In Utah, instead of CFG coaches, literacy and numeracy coaches work with schools and grade-level teams (National School Reform Faculty – Utah, 2006).

Impact of CFG model

The research on CFG is limited. In a literature review by Key (2006), she found only “sixteen research and evaluation studies pertaining to the impact that CFG (or the use of protocols) have had on schools, teachers, or students” (p.1). From the research that has been conducted, Keys found that CFG do have an impact on a school’s ability to create a culture of collaboration and cooperation. She also found that CFG have an impact on teacher community and the development of an individual’s sense of professionalism. The research was not as definitive when looking at the impact of CFG on teacher practice. Studies showed a broad range of impact from minimal to great.

In reviewing the studies to identify what factors contribute to the success of CFG, Key (2006) found that school culture, the implementation process and the characteristics of group members and their ability to develop trusting relationships were important factors. As supported by the research of Dunne and Honts (1998); Murphy (2001); and Armstrong (2003), Key (2006) found that trusting relationships and a sense of personal responsibility are critical and “contribute to a CFG’s ability to truly engage in the work of asking one another challenging questions and critically examining work samples” (Key, 2006, p. 6). The research showed that the CFG coach played a significant role in the CFG process.

Summary of NSRF model

In summary, CFG are a form of professional development that promotes inquiry and reflection on one’s practice. The CFG process can be used within a school or across schools. CFG membership can vary and include teachers, administrators and district personnel. The intent of the CFG process is to influence practice, the intent of which is that in turn positively influences student learning. As has been identified above, the research is limited and shows that while CFG influence professional culture and teacher learning, the influence on student learning is still in question.

The CFG model is the only model of the four presented in this chapter that defines ‘critical friends’ within a group, peer to peer relationship. The following three models identify the ‘critical friend’ as someone external to the school who works with teachers and administrators in the school improvement process. In these models, the ‘critical friend’ is in a position to provide “pressure and support” in an effort to move school improvement processes further along the change continuum.

NCSI Model – Graduate Students as ‘Critical Friends’

The NCSI model is the second of the two models found within the U.S. public education system. It is the only model presented here that involves a university-school partnership. Of the four models, the role of doctoral students and university professors as ‘critical friends’ to schools is unique in this model. The overview of the NCSI model begins by describing the context within which these ‘critical friends’ facilitate school improvement.

Context

The NCSI model of ‘critical friend’ originated and is housed at Texas State University – San Marcos. In this model, a small group of doctoral students and university professors took on the role of ‘critical friend’ to schools undergoing school improvement projects. The ‘critical friend’ initiative was part of a larger school-university partnership that involved nine schools including elementary, middle and high schools. Each school was paired with either a faculty member or a doctoral student that was in the advanced stage of their program. This person acted as a school’s ‘critical friend’ during the course of the school’s school improvement project (Stiegelbauer et al., 2005).

Conceptualized

The NCSI model reflects the evolution of the role of ‘critical friend’. As presented in their paper at the 2005 AERA conference, Stiegelbauer et al. (2005) from Texas State – San Marcos, suggested that the conceptualization of ‘critical friend’ has grown beyond that of the CFG conceived by the NSRF. They suggested the definition has broadened “to include more external facilitation and leadership team facilitation through some of the

same activities (mentoring, facilitating, supporting, focusing) while adding others, such as the use of graduate students as aides, or providing professional development” (Steigelbauer, 2005, p. 2). They cite Barth (1990); Rust and Friedas (2001); and Stiegelbauer, Gordon and McGhee (2005); to suggest that this role has been emerging as a significant way to support “capacity building and reflective practice” (Steigelbauer et al., 2005, p. 2).

Through a case study approach, Steigelbauer et al. (2005) identified the key components of the role of ‘critical friend’ as experienced by the doctoral students while working with schools. One of the key contributors to the success of the role of ‘critical friend’ was identified as that of earning trust and developing relationships with school personnel. Paying attention to entry points in which to establish relationships was also identified as important. Without the ability to earn trust and develop relationships, the work of the ‘critical friend’ becomes difficult. As was evident through the research, when identifying partnerships between graduate students and schools that were not successful, it was “difficult to sometimes find the ‘right match’ for school teams” (Steigelbauer et al. 2005, p. 44) due to personalities or required expertise.

Operationalized

The work of Steigelbauer et al. (2005) predominately identifies behaviors of the ‘critical friend’. The behaviors can be categorized as involvement in and support with the school planning process; data collection; action research; writing (grants and publications); leadership development and initiating change. Within these activities, the ‘critical friend’ has the opportunity to assist schools in talking with and listening to each other as colleagues and with students and parents as partners in the education process. In

reference to systems thinking, this is a focus on trying to understand the whole (the school) and seeking to engage and understand the parts within the whole (teachers, parents and students).

Another type of activity of the role of 'critical friend' identified in the work of Steigelbauer et al. (2005) is that of linking schools with other graduate students and with other external supports. The 'critical friend' could support schools by partnering schools with other graduate students for the purpose of providing assistance in the action research process. Both schools and graduate students benefited from this arrangement. Schools received assistance with the action research process and graduate students were provided with a learning opportunity within the field. The 'critical friend' acted as a bridge between the schools and the external resources from which the schools could benefit (Steigelbauer et al., 2005). Again, in relation to systems thinking, the role of 'critical friend' assisted schools to merge with the larger system of which they are a part as the schools worked to meet the needs of their students.

Impact of NCSI model

Based on the research of Steigelbauer et al. (2005) it is evident that a 'critical friend' has the potential to significantly influence the way the school as an organization operates. As 'critical friends' work with school administrators and teachers to determine school priorities, assist them in working towards the priorities, and collect data to assist in determining the impact of their work, they have the potential to influence teachers and administrators to shape how a school functions. The issue of developing trust is paramount while relationship building.

In the research conducted by NCSI (Stiegelbauer et al., 2005) the graduate students identified contributions they made to the schools in their role as 'critical friend'. This included the opportunity to provide school teams with ideas and resources, assisting with action research projects and providing professional development. The 'critical friends' also had the opportunity to assist formal and informal leaders in the school in identifying what the school leaders had learned through the improvement process and then coaching them to share their learning with colleagues in their school. The purpose of school leaders sharing their learning with others was to try and build the capacity of more people to do the work.

Many of the 'critical friends' "followed the model of 'pressure and support'" (Stiegelbauer et al., 2005, p. 40). Providing services, such as the ones listed above, alleviated the workload and the time pressures for the school teams. This was one way for the 'critical friends' to provide support to the schools. It also provided some pressure as the expectation was that the team would then act on the information. Working with the teams to develop leadership capacity was another way to provide pressure and support. As they supported leaders in their professional development, the expectation was that the informal and formal leaders would then themselves facilitate school improvement activities in the school.

The 'critical friends' met with varied success in terms of their engagement with a school and the school's progress. As suggested by Steigelbauer et al. (2005) the most effective 'critical friends' were those who "worked with the school and its team regularly, intentionally and intimately" (p. 40). In order to do this, the 'critical friends' needed to have a relationship of trust with the schools.

Summary of NSCI model

Learning was central to the NCSI model, both for the individuals in the schools and also for the ‘critical friends’. As stated by Steigelbauer et al. (2005), “to be a critical friend is to be a facilitator of change, a listener, an organizational consultant, a resource aide, a public speaker, an evaluator and many other things, not the least of which is a “learner” (p. 43). This supports the premise stated in Chapter One, that adult learning is a factor in school improvement. For schools to engage in the improvement process, educators must be willing to learn. In the case of the NCSI model, learning occurred for both those engaged in the role of ‘critical friend’ and those who participated with ‘critical friends’.

Local Education Authorities (LEA) as ‘Critical Friends’ Model

The Local Education Authority (LEA) as ‘critical friend’ model is found in England. In this model, government workers are ‘critical friends’ to schools. This model has been researched by Swaffield (2002, 2003, 2004, 2005) providing data that inform the context, individual characteristics and relationships that influence the role of ‘critical friend’. This examination of the role conduct of ‘critical friend’ is found in the following sections.

Context

The LEA as ‘critical friends’ model is well documented in the work of Swaffield (Swaffield, 2002, 2003, 2004, 2005). Her research includes but is not limited to an overview of the history of ‘critical friend’ within the context of school improvement (Swaffield, 2002); the LEA as a ‘critical friend’ (Swaffield, 2003); ‘critical friends’ as

part of the Leadership for Learning projects in Britain (Swaffield, 2004; Swaffield & MacBeath, 2006); the relationship between ‘critical friends’ and head teachers (Swaffield, 2005); and the role of ‘critical friend’ and school self evaluation (Swaffield & MacBeath, 2005). This model is different from the models previously presented. In this model government employees assume the role of ‘critical friend’ to schools as part of their work as a LEA.

It is important to note that the relationship between schools and the British Education Authority can be characterized as one of high pressure. The school inspection process is characteristic of how the British government monitors the progress of schools. Changes have been made to the process since 2004 to try and diminish the stress that schools experience from the inspection process. However, the government is still able to close schools that have been identified as needing to improve student achievement levels and have not been able to make the necessary changes that result in increased student success. The pressure that accompanies the British inspection process is unlike the relationship that schools and governments have in Canada and the United States. North American schools do not receive inspections from the government and are not under pressure to meet government standards in order to keep their doors open. This is important to note as the LEA working as ‘critical friends’ to schools within the British context bears stresses that would not be found in the North American context.

Conceptualized

The research on the role of a ‘critical friend’ within the British context, identifies three important elements of the process of ‘critical friend’ (Swaffield, 2004). These three elements inform the conceptualization of the role of ‘critical friend’. The three elements

are the context in which the role of 'critical friend' operates, the individual characteristics of the 'critical friend', and the relationships as associated with the role of 'critical friend' (Swaffield, 2004). They are discussed below.

Context.

Context is one element identified by Swaffield (2004) as important when conceptualizing the role of 'critical friend'. No two schools are the same. People, history, location, culture and resources define a school's context. Swaffield (2004) cites Morrison (2002, p. 5) to emphasize that "none of us can exist independent of our relationship with each other. . . an organism interacts dynamically with its environment, influencing and, in turn, being influenced by its environment". To understand the role of 'critical friend' one must consider the context in which the 'critical friend' operates.

Within the research on the LEA as 'critical friend' model, context is described at two levels (Swaffield, 2003, 2005). The first is the larger context of education. As described by Barber (2001) in Swaffield (2003) the context within which the LEA advisors work with schools is one of "high challenge, high support" (p. 3). Their focus is to assist "schools to raise standards, through support and challenge, mirroring the national agenda. . . . Success is rewarded, . . . [and] failure challenged" (Swaffield, 2003, p. 4). The agenda of the LEA is that of the government which, as Bottery (2002) suggests as found in Swaffield (2003), stems from a "neo-liberal ideology" (p. 3).

The second dimension of context is in relation to the individual school. Swaffield (2005) identified aspects of context in relation to the individual school that are important to consider. They include the familiarity of the 'critical friend' to the school and/or district. Is the 'critical friend' known and what is his/her track record? The credibility and

history of the administrator is also important. How long has the administrator been at the school and what is his/her record? The relationship between the 'critical friend' and the administrator also needs to be considered. What is the working relationship between the 'critical friend' and the school administrator or school team? The culture and climate of the school also needs consideration. What is the school's reputation? What are the schools' characteristics?

Both the larger context and the local context need to be taken into consideration when conceptualizing the role of 'critical friend'. Understanding context is important to understanding the 'role taking' within which 'critical friends' engage. 'Role taking', the act of imagining how others perceive us and then trying to mirror that, is based on the work of Turner (1962, 1985) as found in Williams (1989). The context in which the 'critical friend' operates is therefore an important consideration when trying to understand the role of 'critical friend' as the context will influence how a 'critical friend' perceives him/herself.

Individual Characteristics.

The characteristics and experiences of the 'critical friend' are another fundamental element to consider when conceptualizing the role of 'critical friend'. When the role has been clearly articulated, it is possible to identify the characteristics and experiences that would assist an individual in becoming an effective 'critical friend'. Swaffield (2005) identified five aspects of the role of 'critical friend' using the work of Winkley (1985); Miles et al. (1988); Ross and Reagan (1990); Ainscow and Southworth (1996); and MacBeath et al. (2000). The five aspects include the particular functions or the roles that a 'critical friend' fulfills, the specific behaviours that a 'critical friend' does, the

knowledge or experience that a 'critical friend' has, the skills or techniques the 'critical friend' uses and the personal qualities that assist someone in their role as 'critical friend' (p. 45)

In addition to this, a list of characteristics and activities describes the role of 'critical friend' (Swaffield, 2002, 2004). They can be summarized as follows. A 'critical friend' must have permission to help. Because a 'critical friend' is external to the situation, a school must be willing to engage with the 'critical friend' in order for the 'critical friend' to work effectively, meaning the school needs to "give" the 'critical friend' "permission" to engage with them (Swaffield, 2002, 2004).

As in the NCSI research, the work of Swaffield (2002) identified the importance of building relationships premised on trust. In order to assist schools, the 'critical friend' must have a working knowledge of educational change and school improvement processes. The 'critical friend' must be focused on the work at hand and while doing so, act as an advocate for the work within which the school is engaged. The role of 'critical friend' is a facilitative role, working with others by providing research and skill expertise as needed. Similar to the NCSI reference to using pressure and support, balancing "friendship and critique, through personal support and professional challenge" is essential to the role conduct of the role of 'critical friend' (Swaffield, 2002, p. 5).

The research on the LEA as 'critical friend' model provides a focus on the role conduct of the 'critical friend' as opposed to the activities within which a 'critical friend' engages. Examples from the research regarding the role conduct of 'critical friend' are found in phrases such as "seeks to enable", "is an advocate", "is facilitative" and "motivates and reassures" (Swaffield, 2003, 2004). The ability to enable, advocate, facilitate and motivate requires a well-developed self-awareness. To assist others in their

own work, the ‘critical friend’ would need to pay attention to not only their expert knowledge and the delivery of tasks, but also to how they are relating to others when using their knowledge. This adds another dimension to the understanding of the role of ‘critical friend’. As identified in the previous section, the NSCI research has as its focus the activities within which a ‘critical friend’ engages. The NSCI model together with the LEA model provide activities and role conduct, which can inform a social paradigm of the role of ‘critical friend’.

The individual characteristics of the ‘critical friend’ (Swaffield, 2002, 2004) allow the ‘critical friend’ in assisting others in what Freud referred to as “raising consciousness” (Swaffield & MacBeath, 2006, p. 4). Working with others to bring to a conscious level what they believe and understand to be true about learning, teaching and the purpose of school, and then to share that with others, is illustrated by the Johari Window, illustrated in Figure 1, as found in Swaffield (2002).

Figure 1: Johari Window

	Known to self	Not known to self
Known to others	Open	Blind
Not known to others	Hidden	Unknown

The ‘critical friend’ as someone external to a school, can assist others in critiquing that which is in the “open”; bring to the surface that which is “hidden”; assist in creating the conditions so that people may realize that to which they are “blind”; and together explore the “unknown”. ‘Critical friends’ do this as they listen, question and assist others

in re-framing. The ability to assist others in raising their level of consciousness so that they have a greater awareness to the issues around them and how they contribute and react to them requires skill and experience. Winkley's (1985) "listening ear" and MacBeath and Myers (1999) "tuning in" are cited as aspects of the role (Swaffield & MacBeath, 2006, p. 5). Bolman and Deal's (1991) re-framing, promotes the activities of the 'critical friends' as assisting others in "seeing the familiar in a new light" (Swaffield, 2004, p. 3).

The research on the LEA as 'critical friend' model compares the role of 'critical friend' to the role of consultant. In examining the characteristics and experiences of a 'critical friend', what was determined was that while 'critical friends' could also be Consultants, not all Consultants could be considered 'critical friends' (Swaffield, 2004). In comparing 'critical friends' to Consultants, it was determined that

Critical Friends were more process than task oriented; transformative 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 a solution to a specific problem. (Swaffield, 2004, p. 4)

The work of a 'critical friend' being transformative and working towards fundamental change is that of emancipatory learning. As suggested by Cranton (1991), our "emancipatory interests come from our desire to grow, develop and increase our self-awareness" (p. 191). As adults engage in critical reflection, Mezirow (1991) as found in Cranton (1991) suggests they may examine the content of the problem, the process of how things came to be the way they are and/or they may question the problem itself. Critical reflection often leads to transformative learning (Cranton, 1991). This describes

the work of the role of the ‘critical friend’ as demonstrated in the research on the LEA as ‘critical friend’ (Swaffield, 2002, 2003, 2004, 2005).

As the research on the LEA as ‘critical friend’ model suggests there is much to consider when conceptualizing the role of ‘critical friend’. Understanding what it is a ‘critical friend’ does, how that is different from the work of a Consultant, and the characteristics and knowledge that one must have to be a ‘critical friend’ are important considerations. The ability for the role of ‘critical friend’ to engage others in transformative learning is an important aspect of the work of the ‘critical friend’. This, together with an understanding of context further defines a social paradigm of the role of ‘critical friend’.

Relationships.

The third element of the role of ‘critical friend’ as identified in the research is the relationship between the ‘critical friend’ and school colleagues (Swaffield, 2004). “Trust, values, purpose and personal qualities, communication and practical action” (Swaffield, 2005, p. 49) are qualities that contributed to a positive relationship. Trust is essential and was described by Swaffield (2005) as the “bedrock of critical friendship” (p. 13). As suggested through the research “credibility increases as the critical friend becomes more informed as to the issues in the school and the context in which the school exists” (Swaffield, 2005, p. 45).

One of the challenges in the relationship between the ‘critical friend’ and the school is that of differing perceptions of the role (Swaffield, 2003). Swaffield (2003) cites Fuller and Fisher (2000); McKenna (1991); and Musella (1998); who have looked at “the importance of ‘role clarification’, and the objectives of the interaction being understood

and agreed upon when external support is used to assist schools” (p. 15). Unclear expectations as to the role and function of the ‘critical friend’ will negatively influence the relationship between the ‘critical friend’ and the school and the work that needs to be accomplished.

The research on the LEA as ‘critical friend’ model (Swaffield, 2002, 2004) also considered the continuum of critic and friend. Using the work of Hampden and Turner (2002), it is suggested by Swaffield (2004) that “an increase in one element does not necessarily mean a decrease in the other” (p. 6). She used the three dimensions of time, critic and friend to illustrate that over time, as the relationship develops, the potential for critic increases (Swaffield, 2004, p. 6). An increase in friendship and critique as is an important consideration in relation to the action of critiquing. As suggested by Harrison (1995) as found in Swaffield (2003) “. . .when we are under pressure. . .it is hardest for us to do things differently, and yet this is the very time when that divergent and creative response is most at a premium (given that previous practice has not worked)” (p. 11). The ability to accept critique is often more palatable when received by an individual whom we know understands our work and the challenges we face and advocates for the work we are doing. A base of friendship developed over time would seem to be necessary for critique to have a positive role in the transformative learning process of critical friendship.

Summary of Swaffield’s conceptualization of the role of ‘critical friend’

The research on the LEA as ‘critical friend’ model identifies the complex role and function of a ‘critical friend’. Examining the relationships, the context and an individual’s characteristics amplifies the role of ‘critical friend’ and illuminates its complexity. There are many considerations when identifying who should be a ‘critical friend’, how this role

is practiced, and the factors influencing successful practice. In the British model, there is a significant difference between LEA functioning as ‘critical friends’ as compared to the NCSI model (Stiegelbauer et al., 2005) in which university professors and doctoral students acted as ‘critical friends’ to schools, or in the CFG model (Dunne et al., 2000) in which colleagues act as ‘critical friends’ to one another. LEA, as government employees, work for the organization that has the power to provide rewards and punishments to the schools with whom they work if the schools are not meeting the standards set out for them by the government. This is a dimension that is not found in the two models previously discussed.

MSIP Model – MSIP Consultant as ‘Critical Friend’

The fourth and final model is the MSIP model of ‘critical friend’. As described in the following sections, there are variations of ‘critical friend’ models within the MSIP model. One of those variations is the model examined in this research.

Context

The fourth and final model presented in this chapter is the MSIP model of the role of ‘critical friend’. This model is operational within Manitoba, Canada. As identified in Chapter One, since its inception in 1991, MSIP, a non-profit, intermediary organization has provided funding and consultative support to secondary schools and school divisions to “promote educational equity and social justice by collaborating with public secondary schools and school divisions to build their capacity to improve student learning and engagement” (MSIP, 2005a). One way in which the mandate of MSIP has been fulfilled is through the facilitation of the role of ‘critical friend’ by MSIP consultants. As ‘critical

friends', MSIP staff "provide non-aligned, sincere support combined with honest critique and probing questions" (Lee, 1998, p.7). The purpose of doing so is to assist schools in meeting the needs of all students, with particular attention to those students who are not experiencing success.

As was stated in Chapter One, the mandate of MSIP at the time of this study is fulfilled primarily through MSIP consultants working systemically. This requires MSIP consultants to work with high schools within a school division as well as with school division personnel. As each school division has a unique culture, the services of MSIP to each school division are unique. This has also precipitated a change in who are MSIP consultants.

There are two types of MSIP consultants. Some MSIP consultants work solely for MSIP. They are MSIP employees. Their role in schools and school divisions is as an external consultant. There are also consultants who are seconded from their school division by MSIP. These consultants work primarily in their school division and with a few additional schools in the MSIP Network of Schools. The work that seconded consultants provide within their school division, which includes the role of 'critical friend', is done within a context that is known to them. They are internal.

The lens through which an external MSIP consultant works and the lens through which an internal MSIP consultant works are different. This is an important consideration within the context of the MSIP model of the role of 'critical friend'. For example, an internal 'critical friend' may know the context better than an external 'critical friend', but this may mean that they are less free to ask certain questions. While an external 'critical friend' may be more free to ask tough questions, they need time to learn the context of the

school and school division and therefore it may take longer for them to uncover the underlying issues that need to be addressed.

Although there are different models of ‘critical friend’ within MSIP their conceptualization of the role of ‘critical friend’ is constant. The role of ‘critical friend’ is to know a school’s work, enabling one to provide an informed opinion of what the school is doing, provide support to the school in their efforts and establish relationships so that the ‘critical friend’ can ask probing questions and assist school personnel in the process of transformational learning. While context differs from school to school and from an internal to external consultant, the basic conceptualization of the role of ‘critical friend’ remains the same.

Conceptualized

In the 1998 Overall Evaluation of MSIP (Earl & Lee, 1998), MSIP staff is described as taking on the role of ‘critical friend’ to the schools engaged in the MSIP Network of Schools. They were identified as being “knowledgeable and supportive as well as demanding and challenging” (Earl & Lee, 1998, p. 90). Schools who were identified through the Overall Evaluation as experiencing success in their improvement efforts, viewed the ‘critical friends’ as “indispensable” (Earl & Lee, p. 91).

The role of ‘critical friend’ within MSIP evolved as MSIP staff worked with schools and in so doing, learned more about school improvement and how to facilitate change. They identified their role of ‘critical friend’ as supporting “teachers in the risks they were taking to do things differently” (Zimmerman & Lee, 1998, p. 26) They did this through listening, asking questions, celebrating successes, and providing resources and training as needed by the schools (Earl et al., 2003).

As identified above, the research conducted on the role of MSIP within schools and school divisions (Earl & Lee, 1998; Earl et al., 2003; Fullan, Kilcher, & Lee, 1995) identified some of the behaviours and role conduct of MSIP consultants as 'critical friends'. This is not unlike the work of Steigelbauer et al. (2005) which describes the role and activity of the role of 'critical friend' and the work of Swaffield (2002, 2003, 2004) which provides an indepth analysis of the conceptualization of the role of 'critical friend'. However, the conceptualization of the role of 'critical friend' within the context of MSIP requires further study. This research contributes to the research base of MSIP and adds to the understanding and conceptualization of a role that MSIP consultants have been engaged in for over a decade.

Operationalized

As stated by Earl et al. (2003) in the 2003 Overall Evaluation of MSIP "the role of MSIP evolved into one of "critical friends" providing both pressure (asking difficult questions, encouraging evaluation, requiring clear and coherent documentation of progress) and support (consultation for planning and implementation, professional development opportunities)"(p. 5). MSIP staff continues to act as 'critical friends' to individual schools and also participate in 'critical friend' teams consisting of both school division staff and an MSIP consultant (Earl et al., 2003). While the premise of 'critical friend' service by MSIP to schools remains constant, the way in which the service is delivered varies.

As MSIP consultants differ in their perspective, in that they are internal or external, the way in which they deliver 'critical friend' service within school division partnerships also differs. The three types of 'critical friend' service facilitated by MSIP

are discussed below. They include that of an individual MSIP consultant working with an individual high school as that high school's 'critical friend' (MSIP consultant – School Concentration Model), an MSIP consultant working with high school administrators and teachers to build their capacity to be 'critical friends' to one another (MSIP consultant – Capacity Building of School Personnel), and an MSIP consultant working with school division personnel to build their capacity to be 'critical friends' to the high schools in their school division (MSIP consultant – Capacity Building of School Division Personnel).

The MSIP Consultant – School Concentration model involves an MSIP consultant providing the 'critical friend' service to a school, on her own, by assisting the school team with the planning and implementation of their school plan. The consultant may meet with the school team once or twice a year in a 'critical friend' meeting at which time she would assist the school team in reflection, celebration and problem solving. The MSIP consultant would also provide 'pressure and support' to schools beyond the 'critical friend' meetings as she assists schools in executing their school plan. She may do so by providing assistance with data collection and analysis, facilitation, providing research and working directly with groups of teachers and/or students. Within this model, the MSIP consultant may also work at the school division level to assist school division personnel in their work with schools. However, the MSIP consultant's time would be concentrated at the school level.

The MSIP Consultant – Capacity Building of School Personnel model focuses on developing the skills of school personnel to be 'critical friends' to each other. This would involve providing 'critical friend' training to a group of teachers and administrators. Together with the MSIP consultant, this group would then visit each other's school to

have ‘critical friend’ conversations. This model provides teachers and administrators with the opportunity to practice being a ‘critical friend’ to one another while at the same time, gaining a better understanding of another schools’ work. Beyond the ‘critical friend’ conversations, the MSIP consultant would continue to work with schools providing many of the same services as in the MSIP consultant – School Concentration Model. The MSIP consultant would also work at the school division level to assist school division personnel in their work with schools.

The MSIP Consultant – Capacity Building of Division Personnel is the third model. In this model, a ‘critical friends’ team (CFT) facilitates the role of ‘critical friend’. An MSIP consultant works with school division personnel to define and learn the ‘critical friend’ process. The MSIP consultant, together with school division personnel, becomes the CFT. This team visits the high schools in the school division two times a year to have a reflective conversation about the school plan. The MSIP consultant also works with individual high schools within the school division to support the school’s work in relation to their school plan. It is the work related to this last model that was examined through this research.

The ‘critical friend’ service provided by MSIP consultants, regardless of the model, can be summarized as found in the partnership agreement written collaboratively between MSIP and the partnering school division within which this research took place (MSIP, 2005b). The ‘critical friend’ responsibilities include that of supporting schools in the school division by:

- ❑ Coordinating assistance with the school planning process;
- ❑ Providing feedback on the implementation of the school plan;
- ❑ Identifying and locating resources for school improvement; facilitate their initiatives;
- ❑ Connecting schools to other schools and organizations;

- Working with school teams in developing processes to facilitate their initiatives;
- Speaking with staff members individually and collectively;
- Meeting with schools, division administration and school board;
- Providing research and literature; and
- Sharing ideas and successful models from others.

‘Critical friends’ also work with schools as they build their capacity for future direction in best practices by:

- Assisting in collecting and interpreting data and information on current programming around issues and programs identified by the schools and school division in their improvement initiatives; and
- Assisting in developing skills in program assessment and evaluation.

‘Critical friends’ provide support for individual and organizational improvement by:

- Providing the opportunities for individual improvement through a professional growth model, individual professional development, school professional development and networking opportunities; and
- Focusing organizational improvement in building skills to change the capacity of the organization to do its work.

The points above refer to the tasks that ‘critical friends’ do. It is similar to the NCSI list in that it refers to responsibilities that ‘critical friends’ have and identifies what ‘critical friends’ should do. What is absent from this list is a description of the way in which the ‘critical friends’ approach their role, or rather the role conduct of a ‘critical friend’ as discussed in the research on the LEA as ‘critical friend’ model (Swaffield, 2002, 2004).

Impact of MSIP model

As demonstrated above, schools who experienced success in their improvement efforts as indicated in the 1998 Overall Evaluation, identified the role of ‘critical friend’ as vital to the success of the school (Earl & Lee, 1998). The concept of providing both pressure (asking tough questions, holding schools accountable through reports and data

collection) and support (listening to and problem solving with schools, providing resources) was one of the key findings in the 1998 Overall Evaluation (Earl & Lee, 1998). It was also identified in the 2003 Overall Evaluation as one of the important services provided by MSIP to schools (Earl et al., 2003). The role of 'critical friend' is to provide that pressure and support.

Summary of MSIP model

The role of 'critical friend' within the context of MSIP has not been well researched. Overall evaluations of MSIP have identified tasks that the 'critical friends' did. They were identified in this chapter. The overall evaluations have also identified that schools value the role of 'critical friend'. In terms of context, relationships and individual characteristics as identified in the work of Swaffield (2004), the role of 'critical friend' as facilitated by MSIP has not been well researched or documented. This study will inform the ongoing conceptualization of the role of 'critical friend' as enacted through the context of MSIP.

Summary of the Models of the Role of 'Critical Friend'

In an effort to summarize the four models identified in this section, a chart illustrating the important elements that define the role of 'critical friend' and the contextual factors required for the effective enactment of the role of 'critical friend' can be found in Table 2. From this overview, it is evident that the four models are fairly specific and congruent in respect to the underlying premise of the role of 'critical friend'. These would include the important elements of reflection, celebration, inquiry, support and challenge. The common contextual factor is that of trust.

In the three models (NCSI, LEA and MSIP) in which the 'critical friend' is facilitated by someone external to the school, common elements that define the role of 'critical friend' are those of listening, questioning, facilitating, assisting in data collection and analysis, assisting in planning, providing resources, and leadership development. The role of 'critical friend' providing both pressure and support is also found throughout the three models. The research on the role of 'critical friend' within the LEA model provides the most information in terms of the role conduct of the 'critical friend'. This research identifies the qualities and characteristics of empathy, enthusiasm, respect, confidence and genuineness as important.

Table 2: Summary of Four Models of the Role of 'Critical Friend'

Model	Context	Who is the 'critical friend'?	Important elements defining the role of 'critical friend'	Contextual factors required for the role of 'critical friend'
NSRF model	United States public education system	Peer to peer Teachers Administrators School district consultants	<ul style="list-style-type: none"> • Inquiry and reflection • Dialogue • Cooperative adult learning • Listening • Questioning feedback • Critical examination of practice • Peer observation • Problem solving • Group norms • Collaboration 	<ul style="list-style-type: none"> • Trust • Professional learning community ideology

Table 2: Summary of Four Models of the Role of 'Critical Friend' (continued)

Model	Context	Who is the 'critical friend'?	Important elements defining the role of 'critical friend'	Contextual factors required for the role of 'critical friend'
NCSI model	Texas State University - San Marcos doctoral students working as 'critical friends' to public schools within Texas as part of a university-school partnership.	Doctoral students in the advanced stage of their program. University professors	<ul style="list-style-type: none"> • Mentoring • Facilitation • Facilitating reflective practice • Supporting the process of school planning • Data collection • Action research • Writing (grants and publications) • Leadership development 	<ul style="list-style-type: none"> • Trust

Table 2: Summary of Four Models of the Role of 'Critical Friend' (continued)

Model	Context	Who is the 'critical friend'?	Important elements defining the role of 'critical friend'	Contextual factors required for the role of 'critical friend'
NCSI model continued	Texas State University - San Marcos doctoral students working as 'critical friends' to public schools within Texas as part of a university-school partnership.	Doctoral students in the advanced stage of their program. University professors	<ul style="list-style-type: none"> • Assisting in the process of change • Linking schools with other graduate students to support action research • Assisting educators to identify their own learning • Pressure and support 	

Table 2: Summary of Four Models of the Role of 'Critical Friend' (continued)

Model	Context	Who is the 'critical friend'?	Important elements defining the role of 'critical friend'	Contextual factors required for the role of 'critical friend'
LEA model	British education system – high pressure	Local Education Authorities (LEAs) – Government employees working with schools	<ul style="list-style-type: none"> • Facilitation • Listening • Questioning • Reflecting • Providing feedback • Summarizing • Re-framing • Knowledge of education system, the organization of schools, change process, student and adult learning 	<ul style="list-style-type: none"> • Knowledge of the school and/or district • Credibility and history of the school administrator • Relationship of the 'critical friend' with the school administrator

Table 2: Summary of Four Models of the Role of 'Critical Friend' (continued)

Model	Context	Who is the 'critical friend'?	Important elements defining the role of 'critical friend'	Contextual factors required for the role of 'critical friend'
LEA model continued	British education system – high pressure	Local Education Authorities (LEAs) – Government employees working with schools	<ul style="list-style-type: none"> • Interpersonal skills • Data skills • Respectful • Empathetic • Genuine • Confident • Enthusiastic • Pressure and support 	<ul style="list-style-type: none"> • Degree of permission the 'Critical friend' has to help the school • Ability to be politically neutral • Common and clear expectations of the role of 'critical friend' • Trust

Table 2: Summary of Four Models of the Role of 'Critical Friend' (continued)

Model	Context	Who is the 'critical friend'?	Important elements defining the role of 'critical friend'	Contextual factors required for the role of 'critical friend'
MSIP model	Manitoba, Canada High schools engaged in the MSIP network of schools	MSIP Consultants High school administrators and teachers School division personnel	<ul style="list-style-type: none"> • Non-aligned, sincere support • Honest critique • Probing questions • Listening • Providing feedback • Pressure and support • Assisting in the process of school planning • Assisting in the implementation of school plans 	<ul style="list-style-type: none"> • Trust

Table 2: Summary of Four Models of the Role of 'Critical Friend' (continued)

Model	Context	Who is the 'critical friend'?	Important elements defining the role of 'critical friend'	Contextual factors required for the role of 'critical friend'
MSIP model continued	Manitoba, Canada High schools engaged in the MSIP network of schools	MSIP Consultants High school administrators and teachers School division personnel	<ul style="list-style-type: none"> • Providing professional development opportunities • Assisting in data collection and analysis • Facilitation • Providing research • Providing 'critical friend' training • Connecting schools to other organizations • Networking opportunities 	

The four models provide a social paradigm of the role of ‘critical friend’. While each model presented in this chapter has its unique qualities and context, the commonalties among the models provide common features of the role of ‘critical friend’ across different contexts. The literature of the four diverse models of ‘critical friend’ (Dunne et al., 2000; MSIP, 2005b; Steigelbauer et al., 2005; Swaffield, 2002) contribute to an emerging social paradigm of the role of ‘critical friend’. The social paradigm is expanded through this research premised on the conceptual framework as described in the next section.

A Conceptual Framework

The conceptual framework provides organizing principles to assist in the examination of the data gathered through this research. Organizing the research process and then analyzing the data required a framework that informed how data was collected, how it was organized and how the findings were discussed. As this study pursued the research question, what is the social paradigm of the role of ‘critical friend’, the conceptual model provided a lens through which to answer the research question. The conceptual framework is described in the following sections.

Developing the Analytical Framework

A systems approach (Capra, 1996; Senge, 1990) and social constructivism (Cullen, 1999; Gergen, 2001; Green, 2005; Hirtle, 1996; Jones & Brader-Araje, 2002) was used as the basis for the conceptual framework for this research. To understand the role of ‘critical friend’ requires an orientation to this role within the greater system in which it operates. This is supported by systems thinking in which to “understand things

systematically, literally means to put them into a context, to establish the nature of their relationships” (Capra, 1996, p. 25). The work of Capra (1996) and Senge (1990) was used to develop this aspect of the conceptual framework.

While exploring the role of ‘critical friend’ through a framework developed from systems thinking is necessary it is not necessarily sufficient. Consideration must also be given to the creation of knowledge as a product of the role of ‘critical friend’. As suggested by Cullen (1999), ‘social constructivist interpretations, which focus specifically on social origins of knowledge, appear to have direct relevance to learning in organizational settings” (p. 45). The inclusion of social constructivism in the conceptual framework and its outcomes provide the opportunity for the examination of the social construction of knowledge that is facilitated through the role of ‘critical friend’. Within the social constructivism frame, this research considered ‘spaces of influence’ (Green, 2005) in the ‘critical friend’ process.

Conceptualized - From Scientific Paradigm to Social Paradigm (Capra)

The philosophical context for the conceptual framework is found in the work of Capra (1996). A physicist who received his doctorate in theoretical physics, describes the new paradigm as viewing the world as a whole of inter-related parts. His work examines the shift away from the Newtonian perspective driven by the beliefs of absolute truths, uniformity, certainty and simplicity (Zohar, 1997, found in Fris & Lazaridou, 2006), towards a “more holistic, ecological view” (Capra, 1996, p.5) of science. Moving away from the Newtonian concepts of functional parts existing within a vacuum, the whole is explained as the sum of its parts (Fris & Lazaridou, 2006). A systems view is that of nested systems that are connected and in relationship with one another (Capra, 1996). As

a result of the relationships within the system, one must engage in contextual thinking, and not analytical thinking because “properties of the parts. . . can be understood only within the context of the larger whole” (Capra, p. 37). A shift from atomistic to holistic (Fris & Lazaridou, 2006) science describes the shift from scientific paradigm to social paradigm (Capra, 1996).

Social paradigm can be defined as “a constellation of concepts, values, perceptions, and practices shared by a community, which forms a particular vision of reality that is the basis for the way the community organizes itself” (Capra, 1996, p. 6). It was the examination of the social paradigm of the role of ‘critical friend’ that was the intent of this research. The three key criteria of a living system as found in *Web of Life* (Capra, 1996) provided the three frames through which this research organized the system in which the role of ‘critical friend’ was studied. The three key criteria of a living system are ‘pattern of organization’, ‘structure’ and ‘life process’.

Pattern of Organization

‘Pattern of organization’ is defined as the “configuration of relationships that determines the system’s essential characteristics’ (Capra, 1996, p. 161). The ‘pattern of organization’ are those relationships that must be evident for “something to be recognized” as itself (Capra, 1996, p. 158). To examine the role of ‘critical friend’ via the CFT model, consideration was given to the pattern of relationships that had been characteristic of the role within the context of the school division in which this research took place. As was discussed earlier in this chapter, there were multiple parties involved in the CFT process. They included myself as the MSIP Consultant, the eight school division personnel, the eight high schools teams, and the assistant superintendent who

supported this initiative through budget allocations and by championing the work with the senior administration team in the school division. This was the web of relationships associated with the role of 'critical friend'.

The "pattern of organization" is related to the CFT process and involves nested networks (Capra, 1996). One of the networks was the relationship I, as the MSIP consultant had with the assistant superintendent who promoted and supported this initiative. This relationship made other relationships possible because the Assistant Superintendent gave me access to operate within the school division. The relationship of the MSIP consultant with divisional staff who were members of the CFT was another network. This network was made possible because of the network of the assistant superintendent and the MSIP consultant. A third network was the relationship between the network called the CFT and each of the high school teams. The network of the CFT and the high school teams was increasingly more complex from the first two networks, as there were more system parts involved.

Structure

The second key criterion of a living system is "structure". "The *structure* of a system is the physical embodiment of its pattern of organization" (Capra, 1996, p. 158). The 'pattern of organization' as described above, is a series of nested networks. The physical embodiment or 'structure' resulting from this series of nested networks was the CFT. As suggested above, the structure of the CFT was possible because of the relationship of the assistant superintendent and I as the MSIP consultant. This relationship allowed me to engage with school division personnel and provide leadership in the 'critical friend' process. It also gave school division personnel the permission to engage

in the CFT process as the school division personnel were asked by the assistant superintendent to become 'critical friends'.

The 'structure' of the CFT was the mechanism through which the role of 'critical friend' was facilitated in the school division. The CFT, at its maximum membership was a team of eight divisional staff that spanned three levels of the organizational chart and myself as the MSIP consultant. This team of nine created three sub teams. These three sub teams visited high schools and met with their school plan teams, two times a year. School plan teams consisted of school administration and lead teachers who provided leadership in the planning and implementation process of the school plan.

Life Process

"Life process is the activity involved in the continual embodiment of the system's pattern of organization" (Capra, 1996, p. 161). It is what links the pattern of organization and structure (Capra, 1996). Capra used the bicycle to describe the relationships between 'pattern of organization', 'structure,' and 'life process'. In the case of the bicycle, the designer's sketches of the bicycle represent the 'pattern of organization'. The bicycle is the 'structure'. The 'life process,' which is the link between the sketch and the bicycle, "is in the mind of the designer" (Capra, 1996, p. 160). The 'life process' relevant to the role of 'critical friend' exists within the minds of those engaged in and with the role. The 'life process' therefore exists within the minds of those engaged as 'critical friends' in the CFT as well as in the minds of those who engaged with 'critical friends'. Through the focus groups, the 'life process' of the role of 'critical friend' allowed for the revelation of network participants' social paradigm of the role of 'critical friend'.

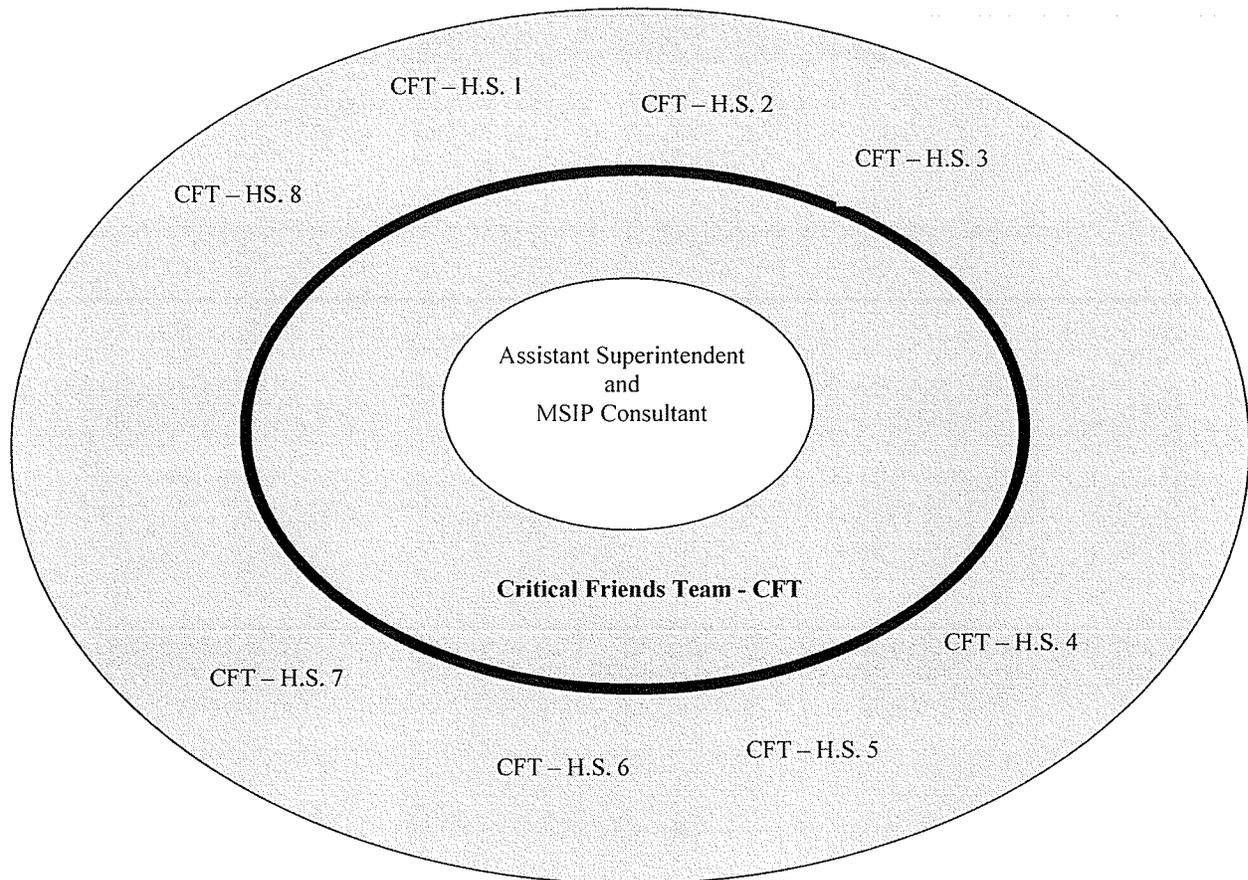
Graphic Representation of Conceptual Framework

The conceptual framework consisting of ‘pattern of organization’, ‘structure’ and ‘life process’ of the role of ‘critical friend’ is graphically represented in Figure 2:

Conceptual Framework – ‘Pattern of Organization’, ‘Structure’ and ‘Life Process’ of the Role of ‘Critical Friend’ based on the three key criteria of a living system (Capra, 1996).

The nested circles represent the “pattern of organization” or the three nested networks of relationships associated with this model of the role of ‘critical friend’. As already identified, the three nested relationships are those of myself as the MSIP consultant with the assistant superintendent, myself and school division personnel as the CFT, and the CFT with each of the eight high schools teams. The bold line around the outside circle of the CFT is meant to demonstrate the ‘structure’ of the relationships that enacted the role of ‘critical friend’. The shaded areas are meant to identify the ‘life process’.

Figure 2: Conceptual Framework – ‘Pattern of Organization’, ‘Structure’ and ‘Life Process’ of the Role of ‘Critical Friend’



Operationalized – The “Learning Organization” (Senge)

“Learning organizations” can be defined as places where “people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to learn together” (Senge, 1990, p. 3). Recognizing that organizations never arrive at the point where they are consistently meeting their goals

effectively over time, Senge (1990) presented a model which illustrates how organizations learn and grow as they are influenced by the outside influences and demands placed upon them. It is within the context of a “learning organization” that five required disciplines are identified (Senge, 1990). Through the five disciplines of systems thinking, personal mastery, mental models, building a shared vision and team learning (Senge, 1990) the conceptual framework for this study is operationalized.

Systems Thinking

As suggested by Senge (1990), human endeavors “are bound by invisible fabrics of interrelated actions, which often take years to fully play out their effects on each other” (p. 7). For organizations to become ‘learning organizations’ attention needs to be given to the interrelated actions and the influence that they have on each other. Seeking understanding using systems thinking requires discipline and patience. It requires that people perceive knowledge as approximate, that people acknowledge and value the process of questioning and that people are prepared to engage in process thinking (Capra, 1996). Within the conceptualization of this study using systems thinking the remaining four disciplines of a ‘learning organization’ are operationalized.

Personal Mastery

Personal mastery is the discipline “of continually clarifying and deepening our personal vision, of focusing our energies, of developing patience, and of seeing reality objectively” (Senge, 1990, p. 7). The ability for individuals to do this is linked to the growth or learning of an organization (Senge, 1990). This research provided myself and those within the school division who had been engaged with the ‘critical friend’ process

with the opportunity to learn more about the role of 'critical friend'. In an effort to identify the important elements that define the role of 'critical friend' and the contextual factors required for the effective enactment of the role, this research provided the opportunity for many individuals to grow in their personal mastery of the role of 'critical friend'. According to the discipline of personal mastery, this research should then also contribute to the learning of the organizations involved, which are the school division and MSIP.

Mental Models

Mental models, as defined by Senge (1990) are "deeply engrained assumptions, generalizations or even pictures or images that influence how we understand the world and how we take action" (p. 8). Part of the process of learning, is the ability to examine our own mental models, the assumptions, values, perceptions and beliefs that shape the way in which we view the world. Within a learning organization, people share their mental models with one another. By making our mental models public, therein lies the opportunity for people to influence each other. The discipline of mental models takes personal mastery to a deeper level and invites others into the process.

Through this research, an effort was made to identify people's mental model of the role of 'critical friend'. Examining individuals' assumptions, values and beliefs about the role of 'critical friend', people's mental models of 'critical friend' began to surface. This informed the important elements that define the role of 'critical friend' and the contextual factors required for the effective enactment of the role of 'critical friend'. The separation of teacher, administrator and school division personnel by focus group membership provided the opportunity for emerging properties to present themselves. This

is consistent with systems thinking that suggests that the whole consists of nested networks with varying levels of complexity. "At each level the observed phenomenon exhibit properties that do not exist at lower levels. The systemic properties of a particular level are called "emergent" properties, since they emerge at that particular level" (Capra, 1996, p. 37).

Shared Vision

A fourth discipline that a 'learning organization' engages in is building a shared vision. As argued by Senge (1990) successful organizations work towards a common vision that has been created and committed to by those within the organization. The research process had the potential to act as a catalyst by which the school division could begin to build a shared vision of the role of 'critical friend'. As people engaged in personal mastery and mental model activity, opportunity was given for individuals to begin articulating a common vision of the role of 'critical friend' for the future. The data may also be used within other networks in the educational system such as MSIP and other educational organizations in Manitoba to further the scope within which the role of 'critical friend' is practiced.

Team Learning

The fifth discipline presented by Senge (1990) is team learning. He argued that when teams are learning they are more effective and productive. Within a team environment, "individual members are growing more rapidly than could have occurred otherwise" (Senge, 1990, p. 10). A critical component of team learning is the ability for a team to engage in dialogue (Senge, 1990). The purpose of dialogue is to provide the

opportunity for ideas to converge for the purpose of creating understanding and identifying the best possible outcome. The process of dialogue requires team members to “suspend assumptions and enter into a genuine thinking together” (Senge, 1990, p. 10). This qualitative PAR, using focus groups as the method for obtaining data, provided the opportunity for individuals to contribute to team learning.

Summary of Senge's Five Disciplines

As outlined above, the five disciplines of a ‘learning organization’ of systems thinking, personal mastery, mental models, building a shared vision and team learning provided a way to operationalize the study of the role of ‘critical friend’ conceptualized through ‘pattern of organization’, ‘structure’ and ‘life process’ (Capra, 1996). Consideration in the research process to the five disciplines (Senge, 1990) provided the opportunity to explore the ‘life process’ of the role of ‘critical friend’ and in so doing, presented the opportunity to further organizational learning on the part of both the school division and MSIP. As stated in the introduction to the conceptual framework, using systems thinking is not sufficient. Because of the focus on adult learning within the social context of the ‘critical friend’ process, it was important to also consider social constructivist thought. The following section provides a rationale and overview of social constructivism as used in this study.

Social Construction of Knowledge through the Research Process

This research is framed using a systems approach (Capra, 1996; Senge, 1990) and social constructivism theory (Cullen, 1999; Gergen, 2001; Green, 2005; Hirtle, 1996;

Jones & Brader-Araje, 2002; Phillips, 1997). Within the theory of constructivism there are many permutations. As summarized by Jones and Brader-Araje (2002)

“[w]ithin educational contexts there are philosophical meanings of constructivism, as well as personal constructivism as described by Piaget (1967), social constructivism outlined by Vygotsky (1978), radical constructivism advocated by von Glasersfeld (1995), constructivist epistemologies, and educational constructivism (Matthews, 1998)” (Defining constructivism section, ¶ 1).

Social constructivism was used in the conceptual framework because both the ‘critical friend’ process and this qualitative research process provided the opportunity for meaning to be socially constructed. As supported by Cullen (1999), “social dialogue is an important component of learning, and . . . cultural tools (beliefs, artifacts, systems) are accessed and acquire meaning in social contexts” (p. 46). Pursuing the beliefs and systems associated with the ‘critical friend’ process, assists in the formation of a social paradigm of the role of ‘critical friend’. As systems thinking allows for a conceptualization and operationalization of the role of ‘critical friend’ within the system in which it lives, social constructivism provides a frame through which to examine the creation of meaning and knowledge in the ‘critical friend’ process. The social construction of knowledge in the ‘critical friend’ process is operationalized through ‘spaces of influence’ (Green, 2005). This is discussed in the next section.

Social Construction of Knowledge through Green’s ‘Spaces of Influence’

‘Spaces of influence’ (Green, 2005) is an elaboration of Vygotsky’s zone of proximal development (ZPD). In ZPD, it is assumed that the teacher or “expert partner in the process already knows” (Green, 2005, p. 295). In ‘spaces of influence’, the

‘influential other’ who could also be referred to as the ‘expert partner’, does not necessarily know. Rather, the ‘influential other’ is prepared to work collaboratively with the learner recognizing that the future is unknown. “. . .the ‘influential other’ takes learning not only to spaces beyond that which the learner might traverse alone (hence the ZPD notion), but to spaces where the journey itself is unknown to everyone” (Green, 2005, p. 295).

‘Spaces of influence’ (Green, 2005) open up the possibility for new learning and the consideration of potential influences in the learning process. They are dynamic, where opportunities and meaning are negotiated. There are also multiple entry points for influence.

In an effort to understand the role of ‘critical friend’, attention must be given to the space in which that role functions. Aligning the role of ‘influential other’ with the role of ‘critical friend’, one would then need to examine ‘critical friends’ as active listeners who “collaborate in their problem-solving to find effective ways of working, and derive fresh viewpoints” (Green, 2005, p. 296). As suggested by Green (2005) “within these spaces of influence individuals and collectivities can engage in learning for an unknown future” (p. 296). The five spaces, ‘spaces of action’, ‘spaces of explicit discourse’, ‘spaces of learning’, ‘spaces of practice development’, and ‘spaces of trust’ (Green, 2005) provided a framework to examine how learning has been socially constructed through the ‘critical friend’ process within the context of this study.

Spaces of action.

‘Spaces of action’ (Green, 2005) are opportunities when learners are in the position to determine how they will engage in a particular challenge. Learners recognize

there is as challenge that needs to be addressed and they have the power to determine how they will do so. This may occur when a school team identifies a particular challenge and are able to determine how they will address that challenge without the intervention from other networks within the system. Through the examination of the role of 'critical friend', what are the 'spaces of action' that are present for educators?

Spaces of explicit discourse.

In schools and school divisions 'spaces of explicit discourse' are the opportunities where educators are engaged in reflection and inquiry that enable them to clearly identify the "critical elements of a given problem or learning context" (Green, 2005, p. 302). To examine the role of the 'critical friend' one needs to examine its role in the 'space of explicit discourse'. Questions to consider would then include, how do the 'critical friends' engage in explicit discourse among themselves and how do they facilitate explicit discourse with school teams? What is it that the 'critical friend' does when engaging with schools who are in a 'space of explicit discourse'? This research provided the opportunity for individuals engaged in the 'critical friend' process to identify how the role of 'critical friend' facilitated critical reflection and inquiry, which is the activity of explicit discourse.

Spaces of learning.

'Spaces of learning' are the times in which learners engage with the "content knowledge relevant to their learning" (Green, 2005, p. 302). As suggested by Green (2005) 'spaces of learning' are dynamic and flexible. Chaos is welcomed. While the 'influential other' knows there is a solution, they may not know what the solution is. Only that he or she will support the learners in their quest to find the solution. This research

provided the opportunity for individuals engaged in the 'critical friend' process to identify how the process facilitated and/or supported 'spaces of learning'.

Spaces of practice development.

'Spaces of practice development' are "spaces in which process occurs. . .and that anticipation of need is critical" (Green, 2005, p. 302). As suggested by Green (2005) process and practice may vary among communities of learners. The 'space of practice development' is relevant to the school division personnel who were 'critical friends'. They needed to engage in practice development as they learned the role. The research process provided an opportunity for the researcher and the school division personnel who were 'critical friends' to schools, to reflect upon how they developed as a 'critical friend'. In so doing, it provided the opportunity to explore the 'space of practice development' in relation to becoming a 'critical friend'.

Spaces of trust.

'Spaces of trust' are those times in which learners feel they can take risks without being criticized if the results are not favorable. Learners take risks with the intent that the process will inform their ongoing learning. 'Spaces of trust' can also occur when the 'influential other' hands over responsibility and trusts that the learner will "launch into the task at hand" (Green, 2005, p. 304). 'Spaces of trust' are a consideration when formulating the social paradigm of the role of 'critical friend'. As identified in the literature as discussed earlier in this chapter, trust is essential to critical friendship (Swaffield, 2005).

Summary of Social Construction of Knowledge as Related to this Study

Including social constructivism in the conceptual framework allowed for the consideration of the role of ‘critical friend’ facilitating transformational learning. As suggested by Hirtle (1996) “when learners actively construct knowledge in a social context – mediated through language, situated in a framework of problem posing – it provides not only an optimal learning environment, but the potential of transforming the learner’s cultural reality” (p. 91). The common activities of the role of ‘critical friend’ found in the literature as identified earlier in this chapter provide the opportunity for the ‘critical friend’ to engage in problem solving and conversation with others that would allow for the construction of meaning in a social setting. These activities are listening, questioning, facilitating, assisting in data collection and analysis, assisting in planning, providing resources, and leadership development.

The qualities and characteristics of empathy, enthusiasm, respect, confidence and genuineness (Swaffield, 2002, 2003, 2004, 2005) have the potential to facilitate a relationship in which transformative learning can take place. As identified by Cranton (1998) the role of educator and, as this research suggests, the role of ‘critical friend’, within the facilitation of transformative learning, must be one in which the individual in this role “maintains personal power that has as its sources expertise, friendship, loyalty and charisma” (p. 198). This requires ‘critical friends’ to have emotional understanding which as suggested by Stoll, Fink and Earl (2003), allow leaders to “lead their colleagues into uncharted territory on the change journey through the ‘impassioned and critical engagement or critique’ of ideas, purposes and practices” (p. 108).

It is the social process of dialogue and discussion that can facilitate the critique of assumptions, beliefs, values, and practices that is the 'life process' of the role of 'critical friend'. It was therefore important to include social constructivism in the conceptual framework. The 'influential other' and the "spaces of influence" (Green, 2005) in which the 'influential other' operates, allowed for the operationalization of social constructivism. This provided a lens through which to explore the role conduct of the role of 'critical friend'.

A Conceptual Framework- Linking Systems Thinking and Social Constructivism

Systems thinking and social constructivism provided a framework that considered the conceptualization and operationalization of the role of 'critical friend' within a system of nested networks. 'Pattern of organization', 'structure' and 'life process' (Capra, 1996) provided a way to conceptualize the role of 'critical friend' within the context of a living system. Identifying those relationships that allowed for the role of 'critical friend' to operate within the large urban school division was important as the research context involved multiple networks. It also illuminated the need to consider the contextual factors required for the effective enactment of the role of 'critical friend'. Identifying the multiple relationships allowed for the isolation of the relationships that created the CFT, the structure through which the role of 'critical friend' was facilitated. It also enabled the recognition of additional relationships that influenced the role of 'critical friend' within this model. Recognizing the activity or the 'life process' was important. It provided for the consideration of the identification of the important elements that define the role of 'critical friend'.

Using the five disciplines of systems thinking, personal mastery, mental models, shared vision and team learning (Senge, 1990) the research was operationalized. Through the five disciplines, the research is described as a process for individuals and organizations (the school division and MSIP) to learn more about the role of 'critical friend'. The learning occurred as individuals, within the focus groups, shared their mental models (Senge, 1990) of the role of 'critical friend'.

The process of individual and organizational learning resulting from this research parallels the process of individual and organizational learning that occurred within the 'critical friend' process. The interaction between the CFT and each high school team provided opportunities for the social construction of meaning within the context of each high school. This learning occurred as individuals, in conversations with the CFT, shared their mental models (Senge, 1990) of the work they were engaged in with their school. It could therefore be argued that there were similarities of intent and purpose between the CFT/school team meetings and the focus group conversations that were part of the research process.

Incorporating the concept of a social paradigm (Capra, 1996) meant that consideration needed to be given to knowledge as contextual and not analytical and the construction of knowledge as approximate and negotiable (Capra, 1996). Knowledge is created through interaction. The creation of knowledge through interaction is supported by social constructivism. The conceptual framework therefore was not complete without the consideration of social constructivism as a way of conceptualizing the 'life process' of the role of 'critical friend'.

To operationalize social constructivism, 'spaces of influence' (Green, 2005) was used to examine where knowledge is socially constructed through the role of 'critical

friend'. The 'spaces of action', 'explicit discourse', 'learning', 'practice development' and 'trust' provided a map in which to explore the social construction of knowledge through the 'critical friend' process. Consideration that the role of 'critical friend' may operate within these spaces made the examination of social constructivism as part of the role of 'critical friend' more manageable. Rather than the broad concept of social constructivism, 'spaces of influence' (Green, 2005) helped to define what that can look like.

Limitations to Using Systems Thinking

The analogies of "constellation" and "web" (Capra, 1996) suggest intricate patterns of relationships. Capra (1996) references the work of organismic biologist Ross Harrison who "identified configuration and relationship as two important aspects of organization, which were subsequently unified in the concept of pattern" (p. 27). To pursue an understanding of pattern one must examine the connectedness and relationships within the whole. To do this, one must continue the exploration as the patterns and relationships are ongoing.

A limitation of examining the connectedness and relationships within a system is that to be true to systems thinking, one would need to continue examining the system to truly understand it. Within this study, it is important to note that while systems thinking is used to frame the research, the scope of the research itself limits the exploration. This study is confined to the exploration of the role of 'critical friend' within the context of the CFT and the school teams who were involved in the process. Further connections such as the influence of this role within the schools or the influence on school division staff's roles and responsibilities outside of the role of 'critical friend', were not examined. Yet,

to truly understand the role of ‘critical friend’ as it has been practiced in this context, these further connections should be pursued.

Chapter Summary

This chapter provided a summary of the literature in reference to the role of ‘critical friend’ within school improvement. It did so by summarizing four diverse models of ‘critical friend’ (Dunne et al., 2000; MSIP, 2005b; Stiegelbauer et al., 2005; Swaffield, 2002). Through the examination of these models, a social paradigm of the role of ‘critical friend’ was created. This study was conducted to contribute to the social paradigm of the role of ‘critical friend’ and as will be discussed later in Chapter Five, there were themes identified in the data that were found in the literature and themes identified through this study.

The conceptual framework was discussed to describe how the study was organized. Using the three essential elements of a living system, ‘pattern of organization’, ‘structure’ and ‘life process’ (Capra, 1996) and learning organization theory (Senge, 1990) the research was conceptualized and operationalized. The work of Green (2005) and the consideration of ‘spaces of influence’ provided a framework through which to examine the social construction of knowledge through the role of ‘critical friend’. This made the addition of social constructivism to the conceptual framework manageable.

Chapter Three describes the methodology. It provides a rationalization for using Participatory Action Research. Describing the organization of the focus groups and the analysis of the data, the research process becomes transparent. What becomes evident through the chapter is that the invitation to share their mental models (Senge, 1990) of the role of ‘critical friend’ provided the participants and the researcher with the opportunity

to influence the research context where the role of 'critical friend' had been facilitated from 2002-2007.

CHAPTER THREE: METHODOLOGY

This chapter describes the methodology used to answer the question, what is the social paradigm of the role of ‘critical friend’ in school improvement? First the research question is de-constructed. Second, the chapter describes how the operationalization of systems thinking (Senge, 1990) and of social constructivism (Green, 2005) provided a framework through which to explore the research question. Third, it describes the research process by discussing the epistemology, the operationalization of the conceptual framework, the methodology and the methods.

Deconstructing the Research Question

Systems thinking and social constructivism provided a frame in which to pursue the research question “what is the social paradigm of the role of ‘critical friend’? To understand the research question, it is important to clarify what the terms “social paradigm”, “role” and “critical friend” mean. The following section therefore provides definitions of the terms “social paradigm”, ‘critical friend’ and “role”.

Social Paradigm

A social paradigm is defined as “a constellation of concepts, values, perceptions and practices shared by a community, which forms a particular vision of reality that is the basis for the way the community organizes itself” (Capra, 1996, p. 6). In reference to the research question, this study pursued the concepts, perceptions, values, and practices of individuals engaged with the role of ‘critical friend’ within the context of a school improvement division partnership with an intermediary school improvement organization. The data collected through the research process informs the ongoing conceptualization of

the role of 'critical friend' in school improvement. Engaging multiple voices in the research process, this study provided the opportunity for individuals within multiple networks in the system to participate in the pursuit of the research question.

'Critical Friend'

The term 'critical friend' while not well researched, is not unfamiliar to the field of school improvement. It was therefore necessary to look to the literature for existing definitions of the role. They were identified in Chapter Two (Costa & Kallick, 1995; Earl & Lee, 1998; Stiegelbauer et al., 2005; Swaffield, 2005). With consideration of these definitions and my experience as a 'critical friend', this definition is used to define the term. The role of 'critical friend', within the context of school improvement, is someone who provides an external perspective that invites educators to observe and articulate their own beliefs, biases and assumptions. 'Critical friends' assist others in identifying and articulating the work that needs to occur and assist in developing and supporting a plan to achieve that. 'Critical friends' offer practical assistance in the process of school improvement. They do so by providing assistance in the area of research, data collection, facilitation and planning.

Role

Role is defined as "a bundle of norms and expectations-the behaviors expected from and anticipated by one who occupies a position (or status) in a social structure" (Baker and Faulkner, 1991, p. 280-281 as found in Callero, 1994, p. 231). Further to that, roles can be conceptualized as resources. As suggested by Callero (1994), roles "aid in the construction of social action, a feature basic to the argument that roles are employed

as resources” (p. 232). The sociological conceptualization of role parallels the concept of a social paradigm (Capra,1996). Both role and social paradigm are defined through a web of concepts, expectations and definitions held by others.

Framing the Research with Systems Thinking and Social Constructivism

To answer the research question, “what is the social paradigm of the role of ‘critical friend’ ”, two questions were used. They were;

1. What are the important elements that define the role of ‘critical friend’?
2. What are the contextual factors required for the role of ‘critical friend’ to be effective?

The elements are considered ‘important’ because participants were asked in the focus groups, to identify important characteristics and skills that a ‘critical friend’ must have. Elements include characteristics, skills and processes. The contextual factors refer to the conditions required for the effective enactment of the role of ‘critical friend’ in school improvement. The responses to these questions contribute to a social paradigm of the role of ‘critical friend. To assist in answering the questions, as illustrated in Table 3, consideration was given to the five disciplines of a learning organization (Senge, 1990) and the ‘spaces of influence’ (Green, 2005) as discussed in Chapter Two.

Table 3: Framework for the Exploration of the Role of 'Critical Friend'

<p>What is the social paradigm of the role of 'critical friend'?</p> <p>What are the important elements that define the role of 'critical friend'?</p> <p>What are people's mental models of the role of 'critical friend'?</p> <p>What do people envision as the role of 'critical friend'?</p> <p>Within people's mental models and vision of 'critical friend' what do they see as the role of 'critical friend' within 'spaces of action', 'spaces of learning', 'spaces of practice development', 'spaces of explicit discourse' (inquiry and reflection), and 'spaces of trust'?</p> <p>What are the contextual factors required for the role of 'critical friend' to be effective?</p> <p>What are the barriers, present or perceived related to the nested networks?</p> <p>What are the strengths and limitations of the CFT structure as it existed?</p> <p>How do 'critical friends' develop the trust necessary to do this work?</p>
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In an effort to understand the important elements of the role of 'critical friend' the research sought to elicit participants' mental models (Senge, 1990) and vision of the role of 'critical friend' in the school improvement project. Within the focus groups, individuals were given the opportunity to talk about what they had experienced through the process, how they would describe the process to others, what they saw as necessary for the process to be successful and their vision for the role of 'critical friend'. Within the analysis, attention was given to how the responses inform the role of 'critical friend' within 'spaces of learning', 'spaces of practice development', 'spaces of elicited discourse'

and ‘spaces of trust’ (Green, 2005). By doing so, the data identified not only the important elements of the role of ‘critical friend’ but informed how those elements contribute to the social construction of knowledge.

In an effort to understand the contextual factors of the role of ‘critical friend’, it was important to consider the interactions between the nested networks within the school division. During the focus groups, participants were asked to identify the strengths and weaknesses of the CFT structure. This provided an opportunity to identify some of the strengths and limitations of a model that crossed boundaries within the nested network of the school division. By organizing the focus groups according to role – high school teacher, administrator, school division personnel, the opportunity was there for emerging properties to present themselves.

The Research Process

The next section further describes the epistemology of social constructivism and how the research process itself is a social construction of knowledge. This is followed with a synthesis of the operationalization of the conceptual framework. An overview of the epistemology and the conceptual framework are important because they provide a rationale for the methodology and the methods for this research as discussed in the second half of this chapter.

Epistemology

This research is premised on the epistemology of social constructivism (Cullen, 1999; Gergen, 2001; Green, 2005; Hirtle, 1996; Jones & Brader-Araje, 2002; Phillips, 1997). Social constructivism involves the development of understanding which “requires

the learner actively engage in meaning making” (Jones, M.G. & Brader-Araje, L., 2002). As such is based on theorizing as offered by von Glasersfeld (1989) as found in Jones and Brader-Araje (2002) in which “an individual’s knowledge of the world is bound to personal experiences and is mediated through interaction (language) with others” (Social constructivism section, ¶ 7). The role of ‘critical friend’ has involved individuals and teams of people from MSIP, high schools and the school division office. As individuals from these areas of the school division and an external consultant have come together around the process and product of a high school plan, they have had the opportunity to create meaning as they dialogue, discuss, celebrate and question their work. The research process continued the process of meaning making as individuals, within the social process of a focus group, shared their perceptions and understanding of the role of ‘critical friend’.

It is in the process of meaning making that “individuals interpret, assign meaning, and create assumptions about themselves, other people and their environment that provide the foundation for their knowledge of the world (Mo-Yee & Green, 1999, ¶ 3). This work requires a spirit of reciprocity and respect. It also requires that knowledge be viable. As suggested by Jones and Brader-Araje (2002)

social constructivists take von Glaserfeld’s concept of viability, further defining viability as that which fits not only the individual’s scheme of the world, but also fits into the larger social context. It is through checking out our understandings and perspectives with others that we develop a sense of the viability of ideas (Defining Constructivism section, ¶ 6).

This research process, bringing together teachers, high school administrators and school division personnel to talk about their experiences in the ‘critical friend’ process

provided the opportunity to check whether or not people's individual knowledge of the role of 'critical friend' was viable. As they talked within their network (high school teacher, administrator and school division personnel) and as the knowledge generated as a result of the nested networks was analyzed, what resulted was a viable definition of the role of 'critical friend'. Examining the findings in comparison to the four diverse models of 'critical friend' as summarized in Chapter Two (Dunne et al., 2000; MSIP, 2005b; Stiegelbauer et al., 2005; Swaffield, 2002), provided a way to determine the salient elements and the contextual factors of the role of 'critical friend' in addition to the introduction of new salient elements and contextual factors. This contributes to the social paradigm of the role of 'critical friend'.

Examining the social paradigm of the role of 'critical friend' is well supported by social constructivist theory. As the research process pursued an understanding of the "constellation of concepts, values, perceptions and practices shared by a community, which forms a particular vision of reality that is the basis for the way the community organizes itself" (Capra, 1996, p. 6), this occurred by asking others of their understanding and perceptions of this role as a result of their participation with it. This process, while providing the opportunity for people to create meaning about the role of 'critical friend', also provided the opportunity for transformational learning as people reflected upon processes with which they had engaged. The opportunity to de-construct a process that people had engaged in over a period of four years presented the opportunity for individuals to understand the role of 'critical friend' in a way that they had not understood it before. They did so within the confines of this study, premised on the belief that meaning is created when people come together to talk about their values, perceptions and beliefs.

Operationalizing the Conceptual Framework

A systems approach (Capra, 1996) was used to inform the philosophical frame for this study. The 'pattern of organization', 'structure' and 'life process' (Capra, 1996), provided a way to organize the role of 'critical friend' in the school division. Identifying three nested networks associated with the role of 'critical friend' did this. Identifying the nested networks enabled the identification and isolation of the structure of the CFT through which the role of 'critical friend' was facilitated. It also allowed for the identification of the places of activity. The three essential characteristics of a living system (Capra, 1996) were helpful as they provided a way to organize the parts of the system in which this research was facilitated.

The work of Senge (1990) premised on systems thinking, provided an organizational frame for this study. By using the constructs of personal mastery, mental models, team learning and shared vision (Senge, 1990), the research process was organized to provide the opportunity for individuals to further their understanding of the role of 'critical friend'. As school division and school personnel engaged in the process, mental models emerged as people created a shared understanding of the role of 'critical friend'. The team learning that occurred may potentially influence organizational learning as the results are shared with the school division. Through the research process, I also developed my understanding of the role of 'critical friend' as the research process allowed for the transition from a subjective to a more objective understanding of the role of 'critical friend'.

Methodology

The following section describes the methodology for this research. As previously described, the work within this school division associated with the partnership with MSIP was PAR. The research process used to further pursue an understanding of the role of 'critical friend' is a continuation of past practice. It was therefore appropriate to use PAR as the methodology for this research.

Participatory Action Research

To identify why PAR was an appropriate methodology for this study, this section provides a very brief overview of its history and scope. Action research is defined by Gilmore, Krantz and Ramirez (1985), as found in O'Brien (2001, Definition section, ¶ 1).

Action research . . . aims to contribute both to the practical concerns of people in an immediate problematic situation and to further the goals of social science simultaneously. Thus, there is a dual commitment in action research to study a system and concurrently to collaborate with members of a system in changing it in what is together regarded as a desirable direction. Accomplishing this twin goal requires the active collaboration of researcher, client, and thus it stresses the importance of co-learning as a primary aspect of the research process.

Kurt Lewin is considered the pioneer of action research (Berg, 2004; O'Brien, 2001; Warrican, 2006). Action research is described by Berg (2004) based in Adelman's (1993, p. 8) witness of Lewin, as a "process that gives credence to the development of powers of reflective thought, discussion, decision and action by ordinary people participating in collective research on 'private troubles' that they have in common" (p.

195). PAR provides a mechanism by which people can articulate and define their situation in an effort to better it. As suggested by O'Brien (2001), based on the work of Lather (1986); and Morley (1991); neither the positivist nor interpretative paradigm "are sufficient epistemological structures under which to place action research" (O'Brien, Situating action research section, ¶ 3). Rather, it is the paradigm of praxis, "the art of acting upon the conditions one faces in order to change them" (O'Brien, 2001, Situating action research section, ¶ 3) that best describes the action research process. The reciprocal process of knowledge and practice informing one another is a critical component of action research (O'Brien, 2001).

As identified by Berg (2004), with reference to the work of William Goodenough (1963); Elton Mayo (1933); and William Foote Whyte (1943); the origins of action research are "traced to anthropological- and sociological-based community research" (p. 196). Action research methodology is found in the feminist literature, in the field of educational change and in nursing studies (Berg, 2004). It is not surprising that professions which have been identified as "helping professions" such as education and nursing have used action research for as suggested by O'Brien (2001) "those who apply this approach are practitioners who wish to improve understanding of their practice" (p. 6).

Reasons why PAR is an appropriate methodology for this study

As found in Patten, Mitton and Donaldson (2006), Greenwood and Levin (1998) describe, "PAR is a form of social research that blends knowledge generation with organizational action and change" (p. 1123). PAR is a "collaborative and participative learning process" (Warrican, 2006, p. 2) wherein the researcher and the client work

together throughout the research process. It is often described as one way to promote and support organizational learning and change (Berg, 2004; Cousins & Earl, 1995; Patten et al., 2006; Warrican, 2006).

PAR is an appropriate methodology for this research because of my involvement in the research context. Having been a 'critical friend' for almost ten years, I have had an opportunity through the research process to reflect on a role that has been part of my lived experience. This allowed me to begin de-constructing my social paradigm of the role of 'critical friend'. My experience as a 'critical friend' and my engagement in the process within the school division is one reason why PAR is an appropriate methodology for this research.

Further to that, my role in facilitating the role of 'critical friend' in the context in which the research occurred and then writing about it in an effort to inform the evolution of the role within that system, is PAR. As the partnership with MSIP ends in June 2007, the school division will need to determine if and how it will continue to facilitate the role of 'critical friend'. As more people in the school division become aware of the process and would like access to the process, there is a need to identify how to best facilitate the role of 'critical friend' on a wider scale. This need has been identified at the assistant superintendent level. The need is to now create a better understanding of the role of 'critical friend' for the purpose of informing a model that can be used across the school division. Conducting this research should assist in this process.

Indicators of PAR would be the active participation of the researcher and researched. The PAR process as a research methodology does not conceptualize research as something that is done to participants, but rather something that is done in partnership with participants. The extent of participant involvement can vary resulting in a continuum

of PAR. With reference to the work of Wortley (1996); as suggested by Turner (2002), “at one end of the continuum, it is barely distinguishable from good planning practice” (What is action research section, ¶ 1). At the other end of the continuum, “it can be a move towards social justice, facilitating participation and empowerment of individuals and groups who are traditionally less powerful” (Turner, 2002, What is action research section, ¶ 2). This PAR falls closer to the continuum of good planning practice.

With the end of the partnership with MSIP in June 2007, there is an understanding that if the role of ‘critical friend’ is to continue in the school division, it will be important to have a common understanding of the role. In many respects this research is a continuation of the conversations that began during the 2005-2006 school year amongst members of the CFT. As the CFT reflected on its practice, questions began to surface as to the purpose of the role of ‘critical friend’, how this role was or was not part of their daily roles and responsibilities and the skill people need to be a ‘critical friend’. The assistant superintendent who assisted the researcher in receiving permission from the school division to conduct this research was present for two of those CFT conversations. The questions that have been raised and the response of the wider divisional community to become involved in the ‘critical friend’ process speak to the need to continue the conversation through PAR.

Levels of informed consent

Prior to conducting the field research, formal permission was granted from the Superintendent and CEO of Schools. (Appendix B – Letter of Consent from the School Division). The assistant superintendent, who assisted me in receiving approval from the Superintendent and CEO of Schools, reviewed the research proposal to ensure it would

meet the criteria of the school division. This process ensured that permission would be granted from the Superintendent and CEO of Schools. The information in the research proposal that was used to gain school division approval included the epistemology and theoretical perspective framing the research, an overview of the PAR methodology and the draft letters of invitation for focus group participation, consent forms and focus group discussion guides. The assistant superintendent had the opportunity to review the draft letters of invitation, consent forms and focus group discussion guides prior to submitting them as part of the submission to the Education/Nursing Research Ethics Board (ENREB). This was the first level of consent that needed to be obtained prior to submitting the ethics protocol to ENREB.

Upon approval from ENREB, letters of invitation were sent to the high schools and to school division personnel. High school and school division personnel were informed prior to receiving the letters, that this research would occur in early 2007 and that the Superintendent and CEO of Schools had given his permission for the research to be conducted. The participants that agreed to engage in the Focus Groups signed a letter of consent and a letter of confidentiality prior to their participation. This was the second level of consent.

PAR - Politics and Ethics

PAR is a political research process. As suggested by Bolman and Deal (2003), “the political frame views organizations as living, screaming political arenas that host a complex web of individual and group interests” (p. 186). Collaborating with clients in the research process, thereby increasing their control and decreasing the control of the researcher, is a political process. As supported by Cousins and Earl (1995), “. . .the notion

of shared control of the research agenda and the research decision-making process as distinct from researcher-controlled approaches. . .and practitioner controlled activities” (p. 172), distinguishes participatory evaluation from other methodologies. It is for this reason that I paid attention to certain ethical considerations.

As found in O’Brien (2001), there are ethical considerations associated with PAR (Winters, 1996). Such considerations include the importance of ensuring that all those who are involved or relevant to the research are consulted at the beginning of the process and that everyone has an understanding of the work involved. Those who wish to be involved and would like the opportunity to influence the work should be able to do so. As noted above, the assistant superintendent and Superintendent and CEO of Schools had an opportunity to influence the research process at the proposal stage. Once formal divisional approval had been given, school and school division personnel were informed of the research. Upon approval from ENREB, school and school division personnel were invited, in writing, to participate in the focus groups. Only those who were willing and able to participate did so. School and school division personnel were not involved in the creation of the focus group discussion guides.

Those who do not want to participate in the research process need to have that option (Winters, 1996, as cited in O’Brien, 2001). It is for this reason that school and school division personnel were given a letter of invitation from myself to participate in the focus groups. People had the option of participating. No one was forced to participate.

Another consideration is that the development of the research process should be transparent and the researcher should be open to suggestions from those involved in the process. By involving the assistant superintendent and the Superintendent and CEO of Schools in the process they had the opportunity to provide input into the letters of

invitation and the focus group discussion guides. The assistant superintendent did provide revisions for those documents. The documents were revised prior to submitting them to ENREB. This was the extent to which those engaged in the process had an opportunity to influence it. School and school division personnel who had been involved in the 'critical friend' process were not engaged in the development of the research protocol.

Lastly, the "researcher must take responsibility for maintaining confidentiality" (O'Brien, 2001, Ethical considerations section, ¶ 1). In an effort to do so, the school division involved in the research is not identified. With reference to the focus groups, individuals' names were not included anywhere in the thesis nor in the report to the school division. All documentation such as letters of consent and letters of confidentiality were destroyed upon completion of the research.

Further to Winter's (1996) recommendation of ethical considerations, as suggested by O'Brien (2001), decision making in the research process should be done collectively among the researcher(s) and the participants. This was outlined above through the description of the interaction between the assistant superintendent, the Superintendent and CEO of Schools and myself. This was the extent to which school division personnel were involved in decisions regarding the research process.

It is also important that the researcher is "explicit about the nature of the research process from the beginning, including all personal biases and interests" (O'Brien, 2001, Ethical considerations section, ¶ 2). From the beginning of the research project, I was explicit about my desire to learn more about the role of 'critical friend'. By using a systems approach and social constructivism theory, my biases as a systems thinker who believes that knowledge is socially constructed were presented. This was represented in

the research proposal presented to the school division with the letter requesting approval to conduct the research.

Another aspect of PAR is that participants have access to the information that has been generated throughout the process (O'Brien, 2001). This was addressed through offering the assistant superintendent the opportunity to read through the draft findings and discussion sections. A summary of the findings was shared with the focus group participants. In addition to this, a summary of the findings was shared with the high school teams at a High School Teams Meeting and time was provided for them to discuss the findings.

Lastly, the "outside researcher and the design team must create a process that maximizes the opportunities for involvement for all participants" (O'Brien, 2001, Ethical Considerations section, ¶ 2). While the process that is being outlined is a PAR process, placing it at the end of the continuum of good planning (Turner, 2002), it is not as far down the continuum of participation as I would have preferred. To further the involvement of educators within the school division, I would have preferred to work with a committee to develop the focus group discussion guides and to later review the themes in the data. What was agreed upon with the assistant superintendent was the involvement at the school division level in terms of decision making and approval of the research project. As noted above, PAR is a political research process. Respecting the decisions of those from the school division is an important part of the process. In order to engage with school and school division personnel in the design of the research, permission was required from the Superintendent and CEO of Schools.

Methods

To identify and create a social paradigm of the role of 'critical friend' in school improvement, it was necessary to talk with those who have been engaged in the process. It was important to talk with those who were engaged as a 'critical friend'. It was also important to talk with those who were engaged as recipients of the 'critical friend' process. Listening to their experiences and perceptions as a result of their involvement provided a way to further develop a social paradigm of the role of 'critical friend'.

Using a systems approach in this research required the pursuit of knowledge from multiple participants from within the system. Using a PAR approach, the research process evoked the mental models and vision of the role of 'critical friend' from personnel within high schools, both administrators and teachers, and school division personnel who had been 'critical friends' to schools. Through the triangulation of meaning making involving teachers, administrators and school division personnel, the 'pattern of organization', 'structure' and 'life process' (Capra, 1996) of the role of 'critical friend' was explored.

In using a systems approach, it was important to separate the high school administrators, the teachers and the school division personnel when gathering data. Each of the three groups is a network of its own nested within the larger network of the school division. All three groups have distinct lenses and perspectives through which they view the network called "school" and the larger network of the school division. By gathering data within the smaller networks, the possibility was there for emerging properties to present themselves.

Focus Groups

Focus groups were the method used in this research. Focus groups were used as they are a qualitative tool that allows individuals to share their mental models and vision of 'critical friend'. In many respects, the focus group process mirrors the actual CFT process, because it is a group conversation that seeks to provide people with the opportunity to inquire and reflect. As suggested by Berg (2004), the intent of focus groups is to emphasize subjects' viewpoints. This is consistent with the intent of this study, which was to solicit a social paradigm of the role of 'critical friend'.

The focus group method allowed the exploration of the concept of 'critical friend' with more individuals than would an interview method. Recognizing that interviews may provide more original ideas than focus groups (Fern, 1982 as cited in Berg, 2004), I was prepared to accept that limitation of the focus group method. I wanted to involve as many people as possible in the conversation. Through facilitating focus groups there was a wider representation of views than would have resulted from a handful of interviews.

Focus groups allow people to engage in "bracketing" within a group setting. Bracketing is when you "hold something up for close and careful inspection, when it is removed from the natural world where it occurs and is then examined" (Berg, 2004, p. 128). Within the focus group format, I had the opportunity to observe others as they carefully inspected the role of 'critical friend'. People did so together, thereby providing the opportunity for people to participate in a give-and-take conversation (Berg, 2004). Again, this is not unlike the CFT conversations where individuals had the opportunity to bracket their work with their colleagues and the 'critical friends'.

Process and Documentation

Careful attention was given to how the focus groups were organized and facilitated. It was important, due to my involvement in the research context that my involvement not compromise the research process. The following section describes how participants were invited into the process, the attention to equal representation from the three networks and the role of the facilitator and observer during the facilitation of the focus groups.

Invitation

Upon receiving approval from the school division, ENREB, and the thesis committee, teachers, administrators and school division personnel were invited to participate in the focus group process. This was facilitated through a letter of invitation. To invite school personnel, a letter was sent to high school administrators explaining the research process and inviting their participation. Together with this letter, they also received two copies of the consent form; one for their records, a letter of confidentiality and a self addressed stamped envelope. The signed consent forms were the basis of a list of contacts that were used to schedule focus group sessions.

High school administrators also received a letter asking them to present this opportunity to their school teams inviting a maximum of two teachers from their team to participate in the teacher focus groups. Interested teachers were also required to complete a consent form and return it to the researcher. School division personnel were also sent a letter of invitation, requesting their participation in the process together with a consent

form they were required to sign and return to the researcher. (Appendix C – Letters of Invitation; Appendix D – Consent Form and Letter of Confidentiality).

Participation

In an effort to provide an equal representation of voice from the three networks, four focus groups were conducted. There were two teacher focus groups, one administrator focus group and one focus group with school division personnel. The maximum number of people who could have participated was sixteen teachers, eight administrators and eight school division personnel. Having had eight schools involved in the ‘critical friend’ process, this would have allowed for two teachers from each school, an administrator from each school and all the school division personnel who had been involved in the ‘critical friend’ process.

The actual representation of teachers to administrators in the focus groups was two to one. In each of the two teacher focus groups there were three participants and in the administrator focus group there were three participants thereby providing greater teacher representation. This was consistent with the ‘critical friend’ process where more teachers than administrators were involved in the process. At the school division level three of the eight school division personnel participated in that focus group. The focus groups were conducted within the span of four days to try to ensure that all groups were experiencing similar conditions within the larger system.

Pre-focus group questionnaire

Prior to the actual Focus Group conversation, participants received a short questionnaire about the role of ‘critical friend’ (Appendix D). The purpose of the pre-

focus group questionnaire was to provide an opportunity for participants to begin thinking about the topic of 'critical friend' before talking about it. Participants had the option of completing the questionnaire. Eleven of twelve participants chose to complete it. The questionnaires were anonymous but were identified by participant group.

The first two questions that were asked invited participants to identify the importance of the role of 'critical friend' in the process of school planning and the role of 'critical friend' in facilitating inquiry and reflection. As both had been a focus of the 'critical friend' process, the questionnaire provided an opportunity for participants to express whether or not they saw them as important functions of the role of 'critical friend'. As well, the question about inquiry and reflection provided an opportunity for the participants to identify whether or not the role of 'critical friend' facilitates a 'space of explicit discourse' (Green, 2005). The third question provided an opportunity for participants to respond as to whether or not the 'critical friend' conversations should focus on specific instructional practices. While this had not been a focus of the process in the past, there had been some conversation on the Critical Friends Team (CFT) as to whether or not the conversations should include this. This could also inform the potential for the role of 'critical friend' to facilitate a 'space of practice development' (Green, 2005). The fourth question asked participants to identify to what degree trust is needed for the 'critical friend' process to succeed. This question informed the degree to which participants identified a 'space of trust' (Green, 2005) is needed to engage with a 'critical friend'. The final open-ended question provided an opportunity for individuals to express any concerns or thoughts they had about the role of 'critical friend' before engaging in the focus group conversation.

A five-point scale was used in the questionnaire. A five-point scale was used because I felt that it was important to provide a “somewhat” or “some focus” option should there be someone who did not feel strongly about the question. While using a five point scale does not force participants to commit to the greater or lesser response, it did allow them to respond in such fashion that there should be “some” focus or attention to that particular item in the ‘critical friend’ process. The scale for questions 1, 2, and 4 read as follows.

1 = Very Little 3 = Somewhat 5 = A lot

The scale for question 3 read as follows:

1 = Little focus 3 = Some focus 5 = Big focus

Upon completion of each focus group, participants were invited to share further thoughts with me via a phone interview. A time frame of five to seven days was provided in which participants could contact me. No further response to the research topic was received after the focus groups.

Facilitator and Observer

Together with my committee, it was decided that it would be best if I observed the focus groups while someone from outside the school division facilitated them. I felt it was better to observe the focus groups than facilitate them due to my involvement as a ‘critical friend’ with and to the participants in the focus groups. Facilitating the focus groups would have been very similar to facilitating ‘critical friend’ conversations in schools. It therefore did not seem appropriate for me to facilitate the focus group conversations. I approached someone who worked in the area of school improvement to

facilitate the focus groups. This individual was not associated with this large urban school division but was on staff at MSIP.

The facilitator that was scheduled to facilitate the focus groups became ill just prior to the dates that the focus groups were scheduled. Fortunately, I was able to find another facilitator. A recent graduate of a doctoral program in education agreed to facilitate all four focus groups. Having the same facilitator for all four focus groups was important so as to keep that variable consistent. This worked out well as the new facilitator while knowing the context of the work due to her experience within the field of education, was able to present a neutral and inviting approach to her facilitation. There was no objection to having a facilitator other than the person identified in the letter of invitation nor did I observe any perception of uneasiness from the participants because of this change.

Interview Notes and Transcription

Observing the focus groups allowed me to observe the interactions of the participants during the process. These observations were recorded. I also took notes as the focus groups were facilitated. This provided me with a list of comments that I could go back to after coding the transcripts to see if what I had noted in my observations was consistent with the coding. I also noted any perceived tensions that I observed during the conversation and what was being discussed at that time.

A professional data transcriber was hired to transcribe the focus group tapes. They were transcribed verbatim. Prior to giving the transcriber the tapes, I listened to each tape and made notes. The notes from the observations in the focus group and the notes that

were taken while listening to the tapes were similar in terms of the comments and words that resonated for me.

Content Analysis

The content analysis for this study was dialectic. As previously stated, the research question is; what is the social paradigm of the role of 'critical friend'. The two questions that were used to inform the research question are; 1) what are the important elements that define the role of 'critical friend', and 2) what are the contextual factors required for the role of 'critical friend' to be effective? In analyzing the data, an effort was made to deduce the mental models and vision participants had of the role of 'critical friend'. The questions that were asked in the focus groups provided information to answer the research questions. (Appendix E – Pre-Focus Group Questionnaire and Moderator Guides).

The content analysis was inductive as themes were derived from the data and not from a pre-identified list of themes based on the four diverse models of the role of 'critical friend'. The themes were generated as the researcher read and re-read the transcripts. The themes that were induced from the data were then used to deduce the participants' mental models and vision of 'critical friend' in an effort to write further about the social paradigm of the role of 'critical friend'. While the examination of the four diverse models of the role of 'critical friend' (Dunne et al., 2000; MSIP, 2005b; Stiegelbauer et al., 2005; Swaffield, 2002) provided a list of characteristics and skills required of a 'critical friend', it was the emergence of the themes that began to describe what individuals in this school division believed are the important elements and the

contextual factors that are required for the effective enactment of the role of 'critical friend'.

The content analysis began with open coding. Each transcript was read and a list of general themes was created that I identified as emerging from the data. That list of themes was reviewed and a shorter, more manageable list was created. This shorter list of themes became the "higher order headings" (Burnard, 1991, p. 462). Following this, the transcripts were read again and comments were assigned to every part of the transcript excluding dross. The next day, to ensure that I felt confident about the way I had coded the comments, all of the transcripts were re-read. In that process some revisions were made to the coding and a few additional higher order headings were added.

I then began axial coding (Strauss, 1987, as cited in Berg, 2004). Each transcript was reviewed. Comments were cut out and grouped under the higher order heading identified at the top of the page. This process provided another check to ensure I was satisfied with the coding. A few minor revisions were made to the coding during this process.

Once the axial coding was finished and the comments were grouped under each higher order heading, the findings section was written. This section was organized by higher order heading. Each higher order heading had themes within it, which provided a more detailed description of the data. While doing this, I had a copy of the transcripts in their entirety as well as my field notes, should the need arise to re-confirm the context of certain comments. As well, the research questions and the conceptual model were in front of me on flipchart paper. This was helpful as it provided a constant reminder of the framework in which this data was acquired. To ensure the themes were reliable, a minimum of three quotes was used to support each finding. As a result of color coding the

comments according to participant group, the themes that were common to all three groups and those themes that were common to two of three groups or only one group was easily identifiable.

Chapter Summary

This research method was considered to be PAR due to my involvement in the research context and the research process. The engagement of teachers, school administrators and school division personnel in separate focus groups allowed for the data to be analyzed using a systems lens. By color coding the transcripts based on participant group, there was a visual representation as to how each group informed each theme. Coding the data using higher order headings and then further breaking down those headings into themes, provided a detailed and rich examination of the social paradigm of the role of 'critical friend' based on the perceptions of twelve individuals within this large urban school division.

Chapter Four presents the findings. As the chapter unfolds, the mental models and vision of the role of 'critical friend' become evident. The research question begins to be answered as the social paradigm of the role of 'critical friend' within the context of the school improvement work in one large urban school division is revealed.

CHAPTER FOUR: FINDINGS

In this chapter, the findings are reported. The findings are organized in three sections. First, the results of the Pre-Focus Group Questionnaire are reported. Second, a definition of the role of ‘critical friend’ based on this research is presented. Third, the themes informing the important elements and the contextual factors of the role of ‘critical friend’ are reported. The themes are presented as they are informed by the data from the three participant groups. In presenting the themes according to their representation in the system, it allows for a systems analysis of the findings.

Findings

The pre-focus group questionnaire results and the focus group transcripts represent the experiences, perceptions and ideas of six teachers, three administrators and three school division personnel. The data from their experience forms a social paradigm of the role of ‘critical friend’ as the school division in partnership with an intermediary school improvement organization facilitated it. As the participants reflected on the role of ‘critical friend’, they shared not only their perceptions and beliefs about it, they also shared their concerns about the evolution of the role as the school division disengages with MSIP. The transition of the role of ‘critical friend’ from externally facilitated to internally facilitated is unique to this model of ‘critical friend’, not found in the four models as described in Chapter Two. The overview of the data begins with the results of the Pre-Focus Group Questionnaire.

Pre-Focus Group Questionnaire Results

The results from the Pre-Focus Group Questionnaires are presented in this section.

The number of respondents that participated in the focus groups were as follows:

Teachers, N = 6, Administrators, N = 2, and School Division Personnel, N = 3. Eleven of the twelve participants answered the first four of the five questions. Only one participant answered the final question. In using a five-point scale with one denoting “very little” and five denoting “a lot”, there were no responses given that were less than three. The responses to the five questions are presented below.

Question 1: *To what extent do you believe the ‘critical friend’ process should support school teams in their school planning process?* Teachers, administrator and school division personnel all identified that the ‘critical friend process should support school teams in their school planning process. All responses were four or higher indicating that all three groups identified this process as valuable to school planning.

Question 2: *To what extent do you believe the ‘critical friend’ process should encourage and facilitate inquiry and reflection?* All three groups responded that the ‘critical friend’ process should encourage reflection and inquiry. The teachers ranged in their responses from “somewhat” to “a lot” with only one of the six teachers responding “somewhat”. The three school division personnel responded “a lot” which could suggest that they saw their role of ‘critical friend’ as facilitating a process of reflection and inquiry.

Question 3: *To what extent do you believe the ‘critical friend’ process should focus on discussing content as related to your school plan? i.e. assessment strategies, teaching strategies, philosophies of practice?* This question had the most diverse

responses. The teachers responded either “somewhat” (3) or a little stronger (3.5) but not as high as “a lot” (5). The administrators, while only two of them, responded similarly to the teachers. The school division personnel responses were split with all three of them responding differently. The varied responses could be due to the fact that the ‘critical friend’ conversations had not focused on content related issues and as this had not been part of their experience with the role of ‘critical friend’ individuals were not sure whether or not it should be.

Question 4: *To what extent do you believe trust is an important factor in the critical friend’ process?* This question had the most concentrated responses with all but two teachers responding “a lot”. It is evident that all three groups identified trust as an important factor in the ‘critical friend’ process. School personnel who received ‘critical friend’ support and school division personnel who were ‘critical friends’ both identified trust as important.

Question 5 asked for additional comments. One participant responded from the administrator focus group. The response read as follows.

Critical friend process has been very supportive and instrumental to the school improvement work I have been involved with. Teachers felt more empowered to continue their work.

To summarize the results of the eleven responses to the Pre-Focus Group Questionnaire, participants identified that the ‘critical friend’ process was an important part of the school planning process. Teachers, administrators and school division personnel identified that the ‘critical friend’ process should encourage and facilitate inquiry and reflection and that trust is an important factor in the ‘critical friend’ process. The question related to the ‘critical friend’ process having a focus on specific teaching

and assessment strategies and classroom practice provided the most varied responses. Due to the small sample size, further data collection would need to occur with a larger sample to attain more inter-rater reliability. The next section provides a definition of the role of 'critical friend' based on this research and an overview of the themes that inform the important elements and contextual factors for the effective enactment of the role of 'critical friend' in school improvement.

Definition of the Role of 'Critical Friend'

Based on the experiences of the twelve participants the social paradigm of the role of 'critical friend' can be described as follows. A 'critical friend' is a person who is external to a school. The 'critical friend' has knowledge of school improvement processes and research in addition to having a broad base of experience within education. The 'critical friend' works with a school to assist the school in its work in relation to the school plan. The 'critical friend' is prepared to be a partner in learning, meaning the 'critical friend' engages with a school planning team and together, they explore the school's successes and challenges. The 'critical friend' can then assist the school team in identifying strategies to address the challenges. A 'critical friend' is trustworthy. A 'critical friend' is not in a position of authority or serves an evaluative function over those to whom they are the 'critical friend'. A 'critical friend' engages in conversations with school teams and in the process, listens and asks questions for the purpose of facilitating reflective dialogue. Through the process of reflective dialogue, the 'critical friend' can encourage and celebrate with school teams and facilitate inquiry to assist educators to achieve greater clarity about their work.

Themes Informing the Important Elements and Contextual Factors

In this section, the focus group findings are presented. First, the themes identified in the data are presented according to their representation within the teacher, administrator and school division personnel focus group data. Inviting participants to share their mental models (Senge, 1990) of the role of 'critical friend' through individual focus groups of teachers, administrators and school division personnel allowed for a systems analysis of the data. Second, the themes are presented based on the synthesis of the data into four important elements and four contextual factors that inform the role of 'critical friend' within the context of school improvement. An important consideration when reading through this section is that due to the small sample size, and the unique context of this model, the results are not generalizable. They do however share the social paradigm (Capra, 1996) of the role of 'critical friend' of twelve individuals within the context of a 'critical friend' model facilitated in a large, urban school division in partnership with an intermediary school improvement organization.

Themes identified in the data

Table 4 presents the themes identified in the data. The themes are presented according to the participant group data that informed them, that is teachers, administrators and school division personnel. There were sixteen themes common to teachers, administrators and school division personnel. This suggests that within this research context, both those individuals acting as 'critical friends' and those individuals receiving 'critical friend' support identified many of the same characteristics, skills, knowledge and contextual factors that are required for the successful enactment of the role of 'critical

friend'. There was one grouping of four themes common to the administrators and teachers. This suggests that the responses from the two networks within schools, while having different roles and responsibilities had similarities not found in the data from the school division personnel. There were three sets of two themes. One set was supported by data from the school division personnel. The responsibilities and expectations as school division staff who had been 'critical friends' resulted in themes that represented their experiences and expectations of the role of 'critical friend' not found within the data from the administrators and teachers. Another set of themes was supported by data from the school division personnel and teachers, and another pairing was supported by data from the administrators. There was one theme supported by the school division personnel and administrator data and one theme supported by the teacher data.

Table 4: Representation of Participant Group Data by Theme

<p>School division personnel, administrator and teacher data informed the following themes:</p> <ul style="list-style-type: none">• External to the school• Trustworthy• Partner in learning• Knows school improvement• Broad base of experience• Reflection, celebration and encouraging• Listens• Focus on student learning• Pressure and support• Not enough pressure is a limitation to the process• Using data• Consistency• ‘Agendas’• Relationship of trust between school personnel and ‘critical friends’• High School Team Meetings (HSTMs)• Disengagement of the external facilitator of the role of ‘critical friend’
<p>School division personnel and administrator data informed the following themes:</p> <ul style="list-style-type: none">• School division and provincial priorities

Table 4: Representation of Participant Group Data by Theme (continued)

<p>School division personnel and teacher data informed the following themes:</p> <ul style="list-style-type: none"> • Importance of ‘voice’ • Teachers as ‘critical friends’
<p>Administrator and teacher data informed the following themes:</p> <ul style="list-style-type: none"> • Not in a position of authority • Facilitative not directive • Follow-through on school plan • Networking within MSIP Network
<p>School division personnel data informed the following themes:</p> <ul style="list-style-type: none"> • Action Research • Divisional structures
<p>Administrator data informed the following themes:</p> <ul style="list-style-type: none"> • Leadership development • Processes at the school
<p>Teacher data informed the following themes:</p> <ul style="list-style-type: none"> • Facilitating reflection that can result in clarity

In grouping the themes found in Table 4 four important elements and four contextual factors were identified. The four important elements are the position of the role of ‘critical friend’, the characteristics of the role of ‘critical friend’, the knowledge required for the role of ‘critical friend’ and the process of the role of ‘critical friend’. The four contextual factors are the placement of the role of ‘critical friend’ within the system

in which the role is enacted, supporting processes for the role of 'critical friend', system influences on the role of 'critical friend' and influences the role of 'critical friend' had on the system. The four important elements and the four contextual factors are discussed below organized according to the networks in which the supporting data was found. The discussion begins with the important elements of the role of 'critical friend'.

Important Elements of the Role of 'Critical Friend'

This section begins by presenting the themes that inform the position of the role of 'critical friend', the characteristics of the role of 'critical friend', the knowledge required for the role of 'critical friend' and the process of the role of 'critical friend' as found in the data from all three participants groups (see Table 5).

Table 5: Important Elements – School Division Personnel, Administrators and Teachers

<p>Themes informing important elements supported by data from all three participants groups: school division personnel, administrator and teachers.</p>
<p>Referencing the <u>position</u> of the role of ‘critical friend’ . . .</p> <ul style="list-style-type: none"> • External to the school
<p>Referencing the <u>characteristics</u> of the role of ‘critical friend’ . . .</p> <ul style="list-style-type: none"> • Trustworthy • Partner in learning
<p>Referencing the <u>knowledge</u> required of the role of ‘critical friend’ . . .</p> <ul style="list-style-type: none"> • Broad base of experience • Knows school improvement
<p>Referencing the <u>process</u> of the role of ‘critical friend’ . . .</p> <ul style="list-style-type: none"> • Asking questions and promoting reflection about the school plan • Reflection, celebration and encouraging • Listens • Using data • Pressure and support • Not enough pressure is a limitation to the process • Focus on student learning

As demonstrated in Table 5 all three participant groups agreed that the position of the role of 'critical friend' is enacted by someone outside of the school. As one administrator suggested, 'critical friends' are *an external or independent group*. One of the school division personnel identified the 'critical friends' team as a *group coming in*. One teacher suggested that the 'critical friend' may also come from outside the school division. The 'critical friend' is *someone who is outside of the school, . . . outside of the school division*. While the degree to which the 'critical friend' is external varies among the three groups, all three groups described the position of the role of 'critical friend' as someone external to the school.

The characteristics of the role of 'critical friend' include that of being trustworthy and a learner. As one of the school division personnel shared, *this is all about relationship building and trust*. A teacher described the position of the role of 'critical friend' in this way, suggesting a relationship based on trust.

Somebody who allows us to speak very openly and very honestly about our concerns and about our issues, about our fears, our direction. – Teacher

In addition to being trustworthy, the role of 'critical friend' requires someone who is prepared to learn alongside the group. One administrator described the process as he had experienced, in which the 'critical friend' was *prepared to help you find the answers together so it was a joint learning opportunity*. The characteristics of the role of 'critical friend' based on this research include that of trustworthy and the willingness to learn alongside the school team.

All three participant groups referenced the knowledge that a 'critical friend' should have. This included a broad base of experience and an understanding of school improvement research and theory. In reference to a broad base of experience, one teacher

shared, *I think it's also been really helpful to have someone who's not just a critical friend to your school but who works with multiple schools.* And as one of the school division personnel described, *you need to have someone with a bigger view who can say "it seems like" or "I feel like" or "I hear that" so that you get that bigger voice.* In addition to familiarity with many school contexts, the participants identified the importance of the 'critical friend' knowing school improvement. As one administrator suggested, it should be someone *who truly understands school improvement.* A teacher suggested that the 'critical friend' should *have data . . . and research that they can bring up and that they can use to help us.* The knowledge that a 'critical friend' should have includes an awareness of many educational settings and contexts and school improvement theory and research.

The three participants groups referenced the process of the role of 'critical friend'. This included the 'critical friend' facilitating reflection and celebration in addition to encouraging school teams. The act of celebrating was identified as a valued part of the process. As one administrator shared, *it really is an additional sort of bonus because as a school community you reflect and you celebrate the work that you've accomplished.* The purpose of facilitating reflection is to not only to assist school teams in identifying those actions and results that require celebration but to assist the school team in identifying issues and strategies to address them. A teacher described the 'critical friend' process as one where *the critical friends are there to question and to help guide but they're not there to give the answers specifically.* This is supported by a quote from an administrator who described the process in this way. *They pose questions . . . for more clarification and they ask some very good questions in terms of how things are being conducted.* This is possible because part of the process of the role of 'critical friend' is to listen. As one

school division personnel shared, *we do lots of listening*. A statement from one of the teachers describes the process in this way. *They listen to what we are discussing and then . . . summarize it and throw it back at us and just make sure it's clear for them*. As these quotes suggest, the role of 'critical friend' is a facilitative role.

The process of the role of 'critical friend' is to assist schools with data collection and to reaffirm the process of decision making based on data. As one of the teachers shared, *we have collected a lot of data and the critical friend might say 'so where do you go from there?'* One of the school division personnel supported this by suggesting that *in my little experience with critical friends we talked about well, 'what's the data and what supports that decision making?'* The process of 'critical friend' includes that of assisting school teams in the process of data collection for the purpose of decision making.

The process of the role of 'critical friend' is also to provide pressure and support. As one of the teachers shared, *it seems like the purpose is to support the group, but to pressure us to*. This teacher suggested that the pressure was important due to the busy schedules that schools have. *So we may need a little pressure. But it can't be an intimidating kind of pressure*. One of the school division personnel used the word 'challenge'.

It's to challenge them. The word 'critical' to me is to review their plans and to weed through them and challenge them in reflecting on their process to get to the real heart of student learning so that they can focus on what is important.

Related to the process of 'pressure and support' the participants talked about a deficit of the process being a lack of pressure. As one teacher suggested a, *limitation [is] if we don't feel pushed enough*. This was supported by another teacher who shared, *I have trouble with it sometimes not being as critical as it needs to be . . . we need people to pull us back and say 'you're not doing that, You say you're doing that, but where's your*

evidence of that?' This was supported by one of the school division personnel who described an unhelpful process being, *just letting the horse and pony show go on without any probing at all*. The process of the role of 'critical friend' is to provide 'pressure and support' that enable schools to follow through on their work.

The process of the role of 'critical friend' should focus on student learning. One of the school division personnel talked about working with school teams as they reflected on how their processes support student learning.

...we are there as a team to assist them with their process of school planning and to guide them and challenge them in reflecting on their process to get to the real heart of student learning.

This is supported by a statement by one of the teachers who described the process as one *to make sure that we are looking at how we're working for students; what this has to do with learning*. One administrator suggested that the role of 'critical friend' assists in asking questions like, *'how do you move in a direction where you have students more involved'*? Student learning should be a focus of the process of the role of 'critical friend'.

To summarize the data from teachers, administrators and school division personnel as shared above, all three participant groups support the position of the role of 'critical friend' as external to a school. The characteristics of trustworthiness and learner and a knowledge base that includes a broad base of experience in education and knowing school improvement theory and practice, according to the three participant groups, would assist someone in facilitating the role of 'critical friend'. The process of the role of 'critical friend' includes that of facilitating reflection, celebration and encouraging. This can occur when the 'critical friend' engages in listening. To assist school teams in their work, the 'critical friend' promotes the use of data. The 'critical friend' process provides pressure and support to schools. This is important as a lack of pressure was identified as a

limitation to the role. Through all of the processes facilitated by the role of ‘critical friend’, a focus should be that of student learning.

There were important elements identified by high school administrators and teachers, those participants with a school lens. They inform the position of the role of ‘critical friend’, the characteristics of the role of ‘critical friend’ and the process of the role of ‘critical friend’. They are summarized in Table 6.

Table 6: Important Elements – Administrators and Teachers

<p>Themes informing important elements supported by data from two of the three participants groups: high school administrators and teachers.</p>
<p>Referencing the <u>position</u> of the role of ‘critical friend’ . . .</p> <ul style="list-style-type: none"> • Not in a position of authority
<p>Referencing the <u>characteristics</u> of the role of ‘critical friend’ . . .</p> <ul style="list-style-type: none"> • Facilitative not directive
<p>Referencing the <u>process</u> of the role of ‘critical friend’ . . .</p> <ul style="list-style-type: none"> • Follow through on school plan

Table 6 identifies that those participants situated within a school, identified that the position of the role of ‘critical friend’ should be someone who is not in a position of authority. As one administrator shared, *they would have to be somebody who was not connected to an evaluative process in the building*. A teacher described it in this way,

somebody that's not in a position of authority so we're not afraid of sharing our ideas with them. While all three participant groups identified the position of the role of 'critical friend' as someone external to the school, the data from the school personnel, administrators and teachers, adds to that to suggest that the position of the role of 'critical friend' should not be a situated in a power relationship.

The teachers and administrators talked about one of the characteristics of the role of 'critical friend' being facilitative and not directive. As one teacher described it, *it's also facilitating discussion, not facilitating us and not expecting us just to listen to what they say.* A statement by one of the administrators supports this. *People will react to what's being said whether it's top down or it's someone parachuting in with all of the answers supposedly. That's not going to work very well.* Part of being facilitative is allowing the needs of each school to be expressed and addressed. As one administrator shared, the 'critical friend' should be *able to go into buildings and let the uniqueness of each school come through in those plans.* The characteristics of the role of 'critical friend' should include having a facilitative approach to their work with schools.

The process of the role of 'critical friend' assists schools in following through on their school plan. One administrator talked about 'critical friend' visits *keep[ing] us on track throughout the year.* A teacher described it in this way, *to make sure that our plan is actually being implemented. It's not just something on paper, but it's something that we're conscious of and we're in the process.* The process of the role of 'critical friend' assists schools in not only creating but also implementing a school plan.

To summarize the important elements as identified by high school administrators and teachers, school personnel suggested that the position of the role of 'critical friend' should not be filled by someone who is in a position of authority over those to whom they

are the ‘critical friend’. The teachers in particular referenced their uneasiness in having a reflective dialogue with someone who has power over them. While all three participant groups identified the process of the role of ‘critical friend’ being one of reflection, celebration and encouraging, the school personnel talked about the characteristics of the role of ‘critical friend’ including that of a facilitative and not directive approach. The process of the role of ‘critical friend’ assists schools in following through on their school plan. This was identified by the school personnel as something that they valued.

There was one important element identified from the data from school division personnel and teachers. It referenced the process of the role of ‘critical friend’. It was the suggestion that teachers could be ‘critical friends’ to schools (see Table 7).

Table 7: Important Elements – School Division Personnel and Teachers

Themes informing important elements supported by data from two of the three participants groups: school division personnel and teachers.
Referencing the <u>process</u> of the role of ‘critical friend’ . . .
<ul style="list-style-type: none"> • Teachers as ‘critical friends’ to one another

The data did not provide clear direction as to whether or not the participants thought that teachers could be ‘critical friends’ to schools. One teacher suggested that *it would be interesting to see some teachers visit other schools as critical friends*. Yet when the school division personnel referenced the idea it was suggested that teachers were not interested in engaging in that role. As one of the school division personnel stated, *we’ve suggested that in the past, whether we could have teachers review other school plans . . .*

And the teachers were never really keen on that. It is therefore unclear whether or not the participants felt that teachers could engage in the process of the role of ‘critical friend’ and what that would look like.

There was one important element identified in the data from the school division personnel, which referenced the process of the role of ‘critical friend’. It was action research (see Table 8).

Table 8: Important Elements – School Division Personnel

Themes informing important elements supported by data from one of the participants groups: school division personnel.
Referencing the <u>process</u> of the role of ‘critical friend’ . . .
<ul style="list-style-type: none"> • Action research

In talking about the potential for the role of ‘critical friend’ into the future within this school division, the school division personnel talked about a greater emphasis of action research in school plans. As one person stated, *I see some real school-based relevant action research well done in order to inform and lead what they’re doing and being able to do.* In addition to that, one of the school division personnel talked about bridging theory and practice through action research. *I would like to see critical friends actually bridge that . . . action research . . . theory and practice.* As the idea of action research was only discussed within the school division personnel focus group, further inquiry would need to occur to determine how action research would influence the process of the role of the ‘critical friend’ as the role evolves in this school division.

There was one important element identified from the high school administrator focus group. It informed the process of the role of ‘critical friend’. As identified in Table 9, it is leadership development.

Table 9: Important Elements – High School Administrators

Themes informing important elements supported by data from one of the participants groups: high school administrators.
Referencing the <u>process</u> of the role of ‘critical friend’ . . . <ul style="list-style-type: none"> • Leadership development

The high school administrators described the process of the role of ‘critical friend’ as facilitating leadership development for teachers. One administrator described the process as one that gives;

. . . people who are taking leadership roles with school improvement work an opportunity to share their work . . . It gives them an opportunity to talk about things in-depth . . . in a type of environment where the questions are designed for them to add to their thinking.

Another administrator described it in this way. *It’s a . . . concrete way of demonstrating their leadership.* The professional development of teachers is enhanced through the process of the role of ‘critical friend’ through *collaboration and shared leadership* (Administrator). The administrators described the process of the role of ‘critical friend’ as developing leadership capacity among teachers.

While teachers did not talk about their personal development as one of developing leadership skills, they did talk about the process of the role of ‘critical friend’ facilitating clarity (see Table 10).

Table 10: Important Elements - Teachers

Themes informing important elements supported by data from one of the participants groups: teachers.
Referencing the <u>process</u> of the role of ‘critical friend’ . . .
<ul style="list-style-type: none"> • Facilitating reflection which can result in clarity

One teacher described the process of the role of ‘critical friend’ as *a way for all of that to be clear in our mind and make sure that you understand it correctly*. Another teacher felt that the process facilitated teachers becoming *clearer thinkers*. Having to articulate their thinking to the ‘critical friend’ *is important because then you don’t make any assumptions about what we’re doing* (Teacher). This increased clarity could assist teachers in developing leadership skills as identified by the administrators.

Table 11 identifies the themes that inform the position of the role of ‘critical friend’, the characteristics of the role of ‘critical friend’, the knowledge required of the role of ‘critical friend’ and the process of the role of ‘critical friend’ as discussed above. As demonstrated in the table, of the eighteen themes, only seven themes were not supported by data from all three participant groups. This indicates that while there were themes unique to individual participant groups, there are similarities among the mental models (Senge, 1990) of teachers, administrators and school division personnel. While the sample size for this study was small, the data does present the mental models of twelve individuals as they had experienced the role of ‘critical friend’ within their own context.

Table 11: Summary of the Important Elements of the Role of 'Critical Friend'

Important Elements	T/A/SD	T/A	T/SD	SD	A	T
<i>Position of the role of 'critical friend'</i>						
External to the school	X					
Not in a position of authority		X				
<i>Characteristics of the role of 'critical friend'</i>						
Trustworthy	X					
Partner in learning	X					
Facilitative not directive		X				
<i>Knowledge of the role of 'critical friend'</i>						
Broad base of experience	X					
Knows school improvement	X					
<i>Process of the role of 'critical friend'</i>						
Reflection, celebration and encouraging	X					
Listens	X					
Using data	X					
Pressure and support	X					
Not enough pressure is a limitation	X					
Focus on student learning	X					
Follow through on school plan		X				
Teachers as 'critical friends'			X			
Action research				X		
Leadership development					X	
Facilitating reflection leading to clarity						X

T = Teachers

A = Administrators

DP = Division Personnel

Contextual Factors Required for the Effective Enactment of the Role of 'Critical Friend'

The four contextual factors required for the effective enactment of the role of 'critical friend' are the placement of the role of 'critical friend' within the system in which the role is enacted, supporting processes for the role of 'critical friend', system influences on the role of 'critical friend' and influences the role of 'critical friend' had on

the system. This section begins by presenting the themes that are supported by data from all three participant groups. This is summarized in Table 12.

Table 12: Contextual Factors – School Division Personnel, Administrators, Teachers

<p>Themes informing contextual factors supported by data from all three participants groups: school division personnel, administrator and teachers.</p>
<p>Referencing the <u>placement</u> of the role of ‘critical friend’ within the system in which the role is enacted . . .</p> <ul style="list-style-type: none"> • Consistency • ‘Agendas’ • Relationship of trust between school personnel and ‘critical friends’ • Disengagement of the external facilitator of the role of ‘critical friend’
<p>Referencing <u>supporting processes</u> for the role of ‘critical friend’ . . .</p> <ul style="list-style-type: none"> • High School Team Meetings (HSTMs)

There were four themes identified in the data from all three participant groups that reference the placement of the role of ‘critical friend’ within the system in which the role is enacted. The themes were consistency, ‘agendas’, relationships of trust between school personnel and ‘critical friends’, and the disengagement of the external facilitator of the role of ‘critical friend’. The four themes are discussed below, beginning with consistency.

Consistency in who the ‘critical friend’ is over time was identified as important.

As one administrator described, *I think the consistency in critical friends is key to the success.* A comment from one of the teachers suggests why.

There’s a continuity thing I think as well because they only happen twice a year so it’s hard for that person from year to year if they’re not the same people to really have a good grasp of the perception, . . . the progress of your plan.

A benefit to having the same ‘critical friend’ over time is the ability for the ‘critical friend’ to comment on change and growth within a school. As one teacher commented,

I like the idea of a long-term commitment because even when they were able to say at a meeting, ‘do you realize two years ago you were talking about attendance and how to get your kids to class and now you’re talking about academics?’ . . . we need to be reminded of that . . . somebody with history.

The school division personnel identified the importance of two meetings a year so that they could *see how things had changed.* Consistency in who is the ‘critical friend’ requires that the same person fill the position of ‘critical friend’ within the system over time. The context would therefore need to allow for that to occur.

The placement of the role of ‘critical friend’ within the system informs the ‘critical friend’s’ agenda. One of the school division personnel described the MSIP consultant as having an agenda and wondering what the agenda will become as the model transitions from being externally facilitated to internally facilitated.

But [MSIP Consultant] has an agenda. . . . is aware of the context; where she’s working and where she wants to go. So there is power in the selection. If this becomes a school division phenomenon, my question now becomes . . . what’s the agenda?

The school personnel talked about the agenda needing to be focused on the growth and development of the school. One teacher identified that the agenda of the role of the ‘critical friend’ should be *to move us forward.* This is supported by another statement by a teacher describing the process as one *where there is a lack of agenda and the questions*

are the central issue. An administrator talked about the ‘critical friend’ conversation focusing on *what’s going on with your [the school’s] plan.* The ‘critical friend’s’ position within the system influences the ‘agenda’ of the ‘critical friend’. As one of the school division personnel shared, *there’s a political terrain here because we’re talking about improvement within a system that dictates how improvement will be.* However, the school personnel indicated that the agenda really needs to be about their work and their growth.

The placement of the role of ‘critical friend’ within the system may also influence the relationship of trust between school personnel and ‘critical friends’. As one teacher identified, *I think this year’s critical friend could have been somebody to which people wouldn’t have said as much because of the position that he had within the division.* As one of the administrators suggested, *the people around the table have to feel really comfortable.* If not, as one teacher suggested, *people aren’t going to be as honest if they don’t feel that comfort level.* One of the school division personnel talked about the importance of achieving a state in which they could ask questions that were welcomed. *I think it works well if we’re at the stage when we can ask ‘why’ questions and ‘did you consider’ questions and they weren’t offended or they weren’t annoyed.* The placement of the role of ‘critical friend’ within the system requires consideration to the development of relationships of trust.

Within the research context, the placement of the role of ‘critical friend’ within the system was changing. Moving from an externally facilitated phenomenon to an internally facilitated phenomenon raised questions for the participants. One of the school division personnel asked, *how would the critical friends team be comprised? Who would be a part of it?* A teacher was curious about the influence of the role of ‘critical friend’ if the ‘critical friend’ was in a power relationship with teachers and administrators.

That would be my concern five years from now. It either doesn't exist because it hasn't worked or I'm sitting around the table feeling like I can't be as open as I would want to be with someone who is absolutely objective and understands that maybe there are no stupid questions.

As one of the administrators affirmed, the 'critical friend' must have a *belief and is able to go into buildings and sort of let the uniqueness of each school come through in those plans*. The impending change of the placement of the role of 'critical friend' within the system in which the role is enacted raised questions for the participants worthy of consideration.

The placement of the role of 'critical friend' within the system in which the role is enacted was a contextual consideration for the participants in this study. The degree to which the system allows for consistency in who is the 'critical friend' and the placement of the 'critical friend' influencing the 'critical friend's' 'agenda' were identified by all three participant groups. In addition to that, the placement of the role of 'critical friend' within the system influences the development of the relationship of trust between 'critical friends' and school teams. The unique context of this model, in which the role of 'critical friend' was evolving from being externally facilitated to internally facilitated model, raised questions and concerns from the participants as they wondered about how the role was going to evolve.

There was one theme identified by all three participant groups that suggested the supporting processes for the role of 'critical friend'. It was the High School Teams Meetings. The theme was identified in terms of a networking opportunity that provided time for school teams to come together to dialogue, discussion of practice and generally learning about what works in different settings. One teacher described the benefits of the High School Teams Meetings.

It's really key to compare with colleagues. It was nice because last year's presentations there was a lot of data dialogue . . . talking about their data and having discussions stemming from that, but also sharing different teaching practices that were working really really well in different schools, which is really helpful.

A comment from an administrator identified the High School Teams Meetings as *the opportunity for them [teachers] as leaders to acknowledge that amongst each other and to learn more when it comes to taking on those types of roles.* One of the school division personnel identified the High School Teams Meetings as something that should be considered in future planning. *I think . . . if we were planning again . . . is certainly the opportunity [for] . . . schools . . . to get together at the high school teams meeting.* The context of this model of 'critical friend' included the opportunity for high school teams to come together to share their work in relation to school planning which facilitated the development of leadership skills.

There was one theme identified by the high school administrators and teachers that inform the contextual factors of the position of the role of 'critical friend' within the system in which it is enacted. The theme was networking within the MSIP network of schools and it references the system influences for the role of 'critical friend' (see Table 13).

Table 13: Contextual Factors – High School Administrators and Teachers

Themes informing contextual factors supported by data from two of the three participants groups: high school administrators and teachers.
Referencing <u>system influences</u> for the role of 'critical friend' . . .
<ul style="list-style-type: none"> • Networking within the MSIP Network of Schools

The school personnel talked about the opportunities they had to network with educators beyond their school division. One administrator talked about the importance of *sit[ting] down at the table with administrators from other school division[s]*. A teacher talked about the *Gimli retreats that have happened over the years . . . essential in terms of the networking*. These networking opportunities were part of the larger context of the schools within the research context.

There was one theme supported from the data from school division personnel and high school administrators and it referenced system influences on the role of ‘critical friend’. It was school division and provincial priorities (see Table 14).

Table 14: Contextual Factors – School Division Personnel and High School

Themes informing contextual factors supported by data from two of the three participants groups: school division personnel and high school administrators
Referencing <u>system influences</u> on the role of ‘critical friend’ . . .
<ul style="list-style-type: none"> • School division and provincial priorities

While there were only two quotes found in the transcripts that referenced the larger context of school division and provincial priorities, this theme is included to demonstrate some of the system influences on the role of ‘critical friend’. As one administrator suggested, *with respect to school improvement I can appreciate that there’s provincial priorities and division goals . . . but you have to make decisions about what you see needs to happen*. One of the school division personnel described the two levels of priorities as *natural parameters*.

We have some natural parameters. I mean there are provincial guidelines and priorities. There's divisional guidelines and priorities. Those are just natural parameters that we have to work within and to help schools achieve.

These quotes suggest that the role of 'critical friend' operates within a context of expectations that require consideration as 'critical friends' engage with schools to assist them in their work.

There was one theme identified by the school division personnel and the teachers (see Table 15). The theme of voice references system influences on the role of 'critical friend'.

Table 15: Contextual Factors – School Division Personnel and Teachers

Themes informing contextual factors supported by data from two of the three participants groups: school division personnel and teachers.
Referencing <u>system influences</u> on the role of 'critical friend' . . .
<ul style="list-style-type: none"> • Importance of 'voice'

The school division personnel reflected on the importance of voice in the 'critical friend' process. It was not only that the process gives people voice, but to pay attention to the number of voices and whose voice was present during the conversations with school teams. As one person suggested, *there's a level of voice where all the players around the table are feeling comfortable and actually speak as opposed to just one representing that building*. Another of the school division personnel identified the value of *having lots of different individuals at the table that represent either different areas or different expertise; to bring a different perspective in*. One of the teachers talked about their

struggle to expand voice. *So how do we get more people involved is the question that we're always asking. Because the structure itself works really well, but how do we spread that throughout the school.* A teacher talked about the importance of expanding the influence *so it's not just a core group of people that are . . . making decisions and planning.* The voices representing different experiences and perspectives in the system influence the process of the role of 'critical friend'.

There was one theme supported by data from the school division personnel. The theme division structures references system influences on the role of 'critical friend' (see Table 16).

Table 16: Contextual Factors – School Division Personnel

Themes informing contextual factors supported by data from one of the participants groups: school division personnel.
Referencing <u>system influences</u> on the role of 'critical friend' . . .
<ul style="list-style-type: none"> • Divisional structures

The school division personnel when given the opportunity during their focus group talked about potential divisional structures that would allow the school division to facilitate the role of 'critical friend'. One of the school division personnel suggested, *there should be teams of support people to several schools.* Another suggestion was *to have somebody on the team with administrative experience and somebody with curriculum or student service experience* (School Division Personnel). In addition to working with schools, the 'critical friends' *would also be a communication conduit . . .*

bringing those people, like-minded visions together (School Division Personnel). One person suggested that the role of ‘critical friend’ *would also guide us at the board office. It would guide us in terms of how we would support them [schools] in student services and curriculum.* The way in which the role of ‘critical friend’ is structured within the school division will influence how the role will be enacted.

The last theme to be discussed references influences of the role of ‘critical friend’ on the system (see Table 17). The theme of processes at the school was identified in the data from the high school administrators.

Table 17: Contextual Factors – High School Administrators

Themes informing contextual factors supported by data from one of the participants groups: high school administrators.
Referencing <u>influences</u> the role of ‘critical friend’ had on the system. . .
<ul style="list-style-type: none"> • Processes at the school

While there only two comments found in the transcripts referring to work facilitated in schools, they provide insight into influences of the role of ‘critical friend’ on schools. As one administrator suggested, *even before we’d have a meeting, we’d meet to prepare and so it just caused our school improvement team to do a bit of reflecting about ‘what have we done’.* Another administrator talked about the questions from the ‘critical friends’ arriving at the school prior to the ‘critical friend’ meeting.

. . . when the questions arrived you needed to take a look . . . it was another way for groups to be looking at what they were doing because it was a matter of needing to provide additional information for some of the questions or to consider other things be it student voice or data collected to determine progress.

These quotes suggest that the role of ‘critical friend’ influences how schools spend time. It is not only the time spent in ‘critical friend’ conversations but also the time spent on the activities and conversations leading up to and in follow up to ‘critical friend’ meetings. This suggests another way that the role of ‘critical friend’ influences the system in which it is enacted.

Table 18 identifies the themes that inform the placement of the role of ‘critical friend’ within the system, supporting processes of the role of ‘critical friend’, system influences of the role of ‘critical friend’ and the influence of the role of ‘critical friend’ on the system as discussed above. As demonstrated in the table, of the ten themes, five themes were supported by data from all three participant groups and five themes were supported by either two of the three groups or by only one. This indicates that while there were themes unique to individual participant groups, there are similarities among the mental models (Senge, 1990) of teachers, administrators and school division personnel. While the sample size for this study was small, the data does present the mental models of twelve individuals within this unique model of ‘critical friend’.

Table 18: Summary of the Contextual Factors of the Role of 'Critical Friend'

Contextual Factors	T/A/S D	T/A	A/ SD	T/ SD	SD	A
<i>Placement of the role of 'critical friend' within the system</i>						
Consistency	X					
'Agendas'	X					
Relationships of trust between 'critical friend' and school team	X					
Disengagement of external facilitator of 'critical friend'	X					
<i>Supporting Processes of the role of 'critical friend'</i>						
High School Teams Meetings	X					
<i>System Influences on the Role of 'Critical Friend'</i>						
Networking within MSIP network of schools		X				
School division and provincial priorities			X			
Importance of 'voice'				X		
Divisional structures					X	
<i>Influences of the role of 'critical friend' on the system</i>						
Processes at the school						X

Summary of Findings

The data as presented above identified four important elements and four contextual factors that describe the social paradigm of the role of 'critical friend' based on the mental models (Senge, 1990) of twelve individuals within the research context. Themes identified in the data referenced the important elements of the position of the role of 'critical friend', the characteristics of the role of 'critical friend', the knowledge of the role of 'critical friend' and the process of the role of 'critical friend'. In addition to that, themes referenced contextual factors such as the placement of the role of 'critical friend' within the system, supporting processes of the role of 'critical friend', system influences on the role of 'critical friend' and influences of the role of 'critical friend' on the system. The four important elements and the four contextual factors identified within this study

using systems thinking, suggest that to understand the role of 'critical friend' it is important to consider not only those characteristics, skills and knowledge required to enact the role of 'critical friend' but the positionality of the role of 'critical friend' within the system and how the role interacts within it.

Chapter Summary

In summarizing the twelve participants' mental models (Senge, 1990) of the role of 'critical friend', a social paradigm of the role of 'critical friend' within the research context was constructed. Using systems thinking to analyze the data provided the opportunity to examine the similarities and differences in perceptions and experiences of teachers, administrators and school division personnel. Through this examination, it was evident that the individuals who were engaged as 'critical friends' and those individuals receiving 'critical friend' support had similar perceptions of the role. There were also differences based on the unique roles and responsibilities of each group. Having now created a social paradigm of the role of 'critical friend' situated within this research context, it is necessary to explore how this social paradigm compares with the four models as described in Chapter Two.

Chapter Five therefore examines the findings in relation to the 'critical friend' literature that was presented in Chapter Two. Discussing the themes in relation to the literature provided the opportunity to identify which themes were found in the four diverse models of 'critical friend' and which themes were introduced through this research. In addition to this, Chapter Five examines the data in relation to 'spaces of influence' (Green, 2005). As the Chapter illustrates, the examination of the data in relation to the 'spaces of influence' generates more questions. These questions could be

used to further pursue the social paradigm of the role of 'critical friend' in school improvement. As Chapter Five unfolds, a conceptualization of the social paradigm of the role of 'critical friend' is further developed and questioned.

CHAPTER FIVE: DISCUSSION

In this chapter the social paradigm of the role of ‘critical friend’ as it emerged through the data is discussed. First, there is a reflection on the enactment of power in the role of ‘critical friend’. Second, there is a discussion of the findings in consideration of the four ‘critical friend’ models as described in Chapter Two (Dunne, et al., 2000; MSIP, 2005b; Stiegelbauer, et al., 2005; Swaffield, 2002). Third, I provide a reflection on my role as ‘critical friend’. Fourth, the findings are discussed in the context of the conceptual frame with consideration of systems thinking (Capra, 1996; Senge, 1990), and ‘spaces of influence’ (Green, 2005). The chapter begins with a discussion of power and the role of ‘critical friend’ that shapes the interactions.

Enactment of Power in the Role of ‘Critical Friend’

As defined by Wilson (1999) referencing the work of Isaacs (1987) power is “an enduring capacity to act that ‘is implicated in social structure and is a necessary feature of human agency’” (p. 86). While power is a social resource that everyone possesses, it is only observable when practiced (Rees et al., 1997). The examination of the role of ‘critical friend’ requires the consideration of power as a social resource. How a ‘critical friend’ uses power will influence the relationships a ‘critical friend’ has with schools and the work that results from it. How school teams use power in their own schools will influence their relationships with their peers and the work that results from those relationships.

The multiple networks engaged within this study allow for the examination of power at different levels. First, the role of ‘critical friend’ was practiced within this model as part of the school division’s partnership with an intermediary school improvement

organization. The social structure of the school division's partnership with MSIP enabled the facilitation of the role as the superintendents empowered personnel to interact with the high schools as 'critical friends'. Second, their experience within education and their school improvement knowledge in addition to the position the 'critical friends' had within the school division, contributed to their credibility and accessibility within schools. The extent, to which the 'critical friend' was perceived as credible and trustworthy, influenced their ability to perform the role in the schools. Third, as the 'critical friends' facilitated reflective dialogue with school teams, they were in a position to direct how school teams talked about their work. Sharing research and practices of other schools enabled the 'critical friends' to influence what the schools reflected upon and the outcomes and priorities upon which the schools focused. While school personnel indicated that the role of 'critical friend' involves asking questions that enable school teams to reflect upon their work, consideration should be given to the 'critical friend's' ability to determine what the questions are. The questions direct the reflective dialogue. There is therefore power associated with the selection of questions.

Reflecting upon how power was enacted by school teams, there are two points to consider. One, 'critical friends' met with school teams comprised of administrators and teacher leaders, the formal and informal leaders in the school. The findings provided evidence that the conversations facilitated by the 'critical friends' required teachers to articulate their work to an external group. The process was described as one that resulted in clarity. This clarity provided teachers with a new level of understanding about their work which would then influence how they provided leadership and used power within their own school. Two, it should not be assumed that the processes school teams facilitated resulted from the priorities as identified by the school. The 'critical friends'

were in a position to direct the conversations with school teams. Questions were asked that enabled school teams to clarify their issues. Questions could also be asked to facilitate the agenda of the larger network, in which case, the school team could be directed to fulfill the mandate of the larger system. If this occurs, the ‘critical friend’ process can become a mechanism for the oppressive use of power. It is for this reason, that those enacting the role of ‘critical friend’ must be aware of the power associated with the role and how that power is used.

If the role of ‘critical friend’ is to facilitate transformational learning for educators, the questions that are asked and the information that is shared must allow educators to come to their own understanding of the work they are doing. In doing so, a ‘critical friend’ must also be able to assist schools in dealing with the tensions between the priorities they identify and the priorities that the larger system requires them to address. As formal and informal school leaders achieve clarity about their work, which includes an awareness of the tensions inherent in the system, they can better facilitate transformational learning opportunities for others within their school community.

Themes Validated in the Literature and Introduced in the Research

In Chapter Four, the themes informing the important elements and the contextual factors of the role of ‘critical friend’ in school improvement were organized into eight broad categories of four important elements and four contextual factors. The elements are referred to as ‘important’ because participants were asked in the focus groups, to identify the important characteristics, skills and processes that a ‘critical friend’ must have. The contextual factors referred to the conditions required for the effective enactment of the role of ‘critical friend’. In this section, the themes are discussed in relation to the four

diverse models of ‘critical friend’ as described in Chapter Two. The discussion identifies which themes are found within the four models of ‘critical friend’ and which themes are introduced in this research. The first section reviews the themes in relation to the question, what are the important elements that define the role of ‘critical friend’ in school improvement?

Important Elements that Define the Role of ‘Critical Friend’

This section summarizes the themes that inform the elements that contribute to defining the role of ‘critical friend’ and compares them to the literature of the four models described in Chapter Two. The themes that are found within the literature on the role of ‘critical friend’ in school improvement and the themes identified in this research are discussed. A chart summarizing this information is found in Table 19. The ‘critical friend’ models in which the themes were found are identified immediately following each theme in the left-hand column as follows. The National School Reform Faculty (NSRF) model (Dunne et al., 2000) involving Critical Friends Groups; the Manitoba School Improvement Program (MSIP) model (MSIP, 2005b) including three variations of ‘critical friend’; MSIP consultant – School Concentration, MSIP consultant – Capacity Building of School Personnel and MSIP consultant – Capacity Building of School Division Personnel; the National Center for School Improvement (NCSI) model (Stiegelbauer et al., 2005) involving doctoral students and university professors as ‘critical friends’ to schools; and the Local Education Authority (LEA) model (Swaffield, 2002) including Department of Education officials (LEAs) as ‘critical friends’ to schools.

Table 19: Validating Themes that Inform the Important Elements that Define the Role of 'Critical Friend'

Themes found in the literature	Themes introduced through this research
<p>A 'critical friend' . . .</p> <ol style="list-style-type: none"> 1. is external to the school (MSIP, NCSI, LEA) 2. has a broad base of experience in education and knowledge of school improvement (MSIP, NCSI, LEA) 3. establishes trust (NSRF, MSIP, NCSI, LEA) 4. listens (NSRF, MSIP, NCSI, LEA) 5. encourages (NSRF, MSIP, NCSI, LEA) 6. facilitates reflection, not directive (NSRF, MSIP, NCSI, LEA) 7. provides pressure and support (NSRF, MSIP, NCSI, LEA) 8. facilitates leadership development (NSRF, MSIP, NCSI, LEA) 9. results in follow through on school plans (MSIP, NCSI, LEA) 10. assists others in achieving clarity (NSRF, MSIP, NCSI, LEA) 11. uses data and (NSRF, MSIP, NCSI, LEA) 12. facilitates and supports action research. (NSRF, MSIP, NCSI, LEA) 13. Partner in learning (NSRF, NCSI) 	<p>A 'critical friend' . . .</p> <ol style="list-style-type: none"> 1. promotes and engages in celebration with schools. 2. is not in a position of authority over those to whom they are a 'critical friend'. 3. is limited in his or her influence if they do not provide enough pressure.

Table 19: Validating Themes that Inform the Important Elements that Define the Role of ‘Critical Friend’ (continued)

Themes found in the literature	Themes introduced through this research
14. Focuses on student learning (NSRF, MSIP, NCSI, LEA)	
15. Teachers as critical friends (NSRF)	

As identified in Table 19, there were fifteen themes identified in the research that were found within the four diverse models of ‘critical friend’ as described in Chapter Two. They provide a description of the role of ‘critical friend’ and some of the strategies that a ‘critical friend’ uses. A ‘critical friend’ based on this research and confirmed in the literature is someone who is external to a school who engages with a school as a ‘partner in learning’. The ‘critical friends’ knowledge base includes a broad base of experience within education and knowledge of school improvement. The ‘critical friend’ works to establish trust between her and those to whom she is the ‘critical friend’. A base of trust allows the ‘critical friend’ to listen, ask questions, encourage, and facilitate reflection. These processes can facilitate a sense of clarity for teachers and administrators as they think about their own work. This can facilitate leadership development. The purpose of the ‘critical friend’ inquiry is to influence student learning. As the ‘critical friend’ engages with school teams, the ‘critical friend’ provides ‘pressure and support’, which may result in schools following through with their school plans. The ‘critical friend’ promotes and assists schools in using data, facilitates, and supports the action research process. While teachers can be ‘critical friends’ to one another, teachers were not ‘critical friends’ to one another within the model in this study.

Three themes were identified in the data that were absent in the four 'critical friend' models. One theme identified in the data suggests that the role of 'critical friend' is to promote and engage in celebration with schools. This occurs as the 'critical friend' engages in reflective dialogue with school teams which provides the opportunity for school teams to identify aspects of their work that are resulting in positive influences for students, staff and community. In amplifying what is working, schools may do more of that and/or transfer the strategies and knowledge to other aspects of their work.

Two of the three themes identified in the study provide some cautions when thinking about who can be a 'critical friend' and how the 'critical friend' engages in the process. One, the participants in this study were clear that the 'critical friend' should not be in a position of authority over the person or people to whom they are the 'critical friend'. The participants suggested that it would be difficult for them to question their own work with someone who had authority or an evaluative function over them. There is a great likelihood of the 'critical friend' facilitating a reflective dialogue if the 'critical friend' is not in a power relationship with school team members.

Two, the role of 'critical friend' will not be as effective if the 'critical friend' does not apply enough pressure. The participants talked about the need for the 'critical friend' to ask probing questions that assists teachers and administrators to think about their work, how they are engaging with it and why. Simply reporting to their 'critical friends' and celebrating is not enough. The role of the 'critical friend' requires the facilitation of dialogue that invites school teams to reflect and inquire about their own work.

In this research context, the 'critical friend' model situated within a partnership between a large urban school division and an intermediary organization, was different from the contexts of the four models presented in Chapter Two. Yet, from this synopsis of

the themes informing the important elements of the role of ‘critical friend’, it is evident that this research identified many of the same or similar characteristics of the role of ‘critical friend’ as found in the four models in the literature. In addition, it also identified some considerations in reference to the elements that define the role of ‘critical friend’ in school improvement. Both the themes found in the four models of ‘critical friend’ and those identified in the research are worthy of consideration when developing expectations for the role of ‘critical friend’ within the context of school improvement.

*Themes Informing the Contextual Factors for the Effective Enactment of the Role of
‘Critical Friend’*

This section summarizes the themes participants identified as informing the contextual factors for the effective enactment of the role of ‘critical friend’ and compares them to the research of the four models as described in Chapter Two. The themes that are found within the literature on the role of ‘critical friend’ in school improvement and the themes introduced in this research are discussed. A chart summarizing this information is found in Table 20. The ‘critical friend’ models in which the themes were found are identified immediately following each theme in the left-hand column as in the previous section. A discussion of the themes follows the chart.

Table 20: Themes that Inform the Contextual Factors Required for the Effective Enactment of the Role of ‘Critical Friend’

Themes found in literature	Themes found in this study
<p>The context within which the role of ‘critical friend’ is facilitated is informed by . . .</p> <ol style="list-style-type: none"> 1. consistency in who is the ‘critical friend’. (NSRF, MSIP, NCSI, LEA) 2. relationships of trust. (NSRF, MSIP, NCSI, LEA) 3. the larger context of school division and provincial priorities. (LEA) 4. the ‘critical friends’ ‘agenda’. (LEA) 	<p>The context within which the role of ‘critical friend’ is facilitated is informed by . . .</p> <ol style="list-style-type: none"> 1. processes in schools such as pre ‘critical friend’ visit meetings. 2. voice – whose voice and how broad is the voice. 3. divisional structures. 4. tensions between school and school division priorities. 5. the degree of consistency in whom fulfills the role. 6. disengagement of external facilitator of ‘critical friend’ 7. processes broader than the role of ‘critical friend’.

As identified in Table 20, there were four themes found within the ‘critical friend’ literature as described in Chapter Two. They include consistency in who is enacting the role of ‘critical friend’, relationships of trust between the school team and the ‘critical friend’, the larger context of school division and provincial priorities and the ‘critical friends’ ‘agenda’. Each of these elements, as described below, contributes to a context in which the role of ‘critical friend’ can be effectively enacted.

Consistency refers to having the same ‘critical friend’ over time. This is required so that the school team and the ‘critical friend’ can establish a relationship of trust. This requires a context in which the ‘critical friend’ remains constant. Within a system,

attention needs to be given to the role the 'critical friend' has in addition to being a 'critical friend'. Will the individual(s) identified to be 'critical friend(s)' be able to do so over an extended period of time? The likelihood of those individuals engaging in the role of 'critical friend' over an extended period of time is a contextual factor that requires consideration when developing a 'critical friend' model.

The third theme refers to the context beyond the school and considers the larger system of school division and provincial priorities. The administrators and the school division personnel identified that the priorities within the larger network of the school division and the province influence school priorities. The school division and provincial priorities may have implications for teacher professional development, student assessment and evaluation and curriculum implementation. The knowledge a 'critical friend' has of these priorities will influence the questions that are asked and the conversations they facilitate with school teams. 'Critical friends' should have knowledge of the networks that influence schools.

The fourth theme found in the literature that informs the contextual factors enabling the effective enactment of the role of 'critical friend' is the 'critical friends' 'agenda'. A 'critical friends' 'agenda' is tied to purpose. Is the 'agenda' of the 'critical friend' to assist educators in a reflective process in relation to their own work? Is it to try and facilitate opportunities for transformational learning? Or is it politically motivated, meaning the role of 'critical friend' is to assist schools in meeting the outcomes as defined by the larger system? If the context is such that the 'agenda' of the 'critical friend' is politically motivated, it may be difficult for the 'critical friend' to facilitate reflective dialogue for the purpose of reaching clarity about one's work.

In reference to context, consideration needs to be given to the context in which the role exists. Does the context allow school teams to reflect on their work in such a way that they are not only asked questions but are able to ask questions of themselves? Is it safe for educators to inquire about their work? The 'critical friends' knowledge of the context in which she functions is also necessary. It will influence the 'critical friend's' ability to facilitate reflection and dialogue and assist school teams in moving forward.

There were nine additional themes in this study that inform context that were absent in the four 'critical friend' models. They reference processes within schools, voice, divisional structures, tensions between school and school division priorities, degree of consistency, disengagement of external facilitator and processes broader than the role of 'critical friend'. Through the context of this unique model of 'critical friend', participants talked about contextual elements that influenced and were influenced by the role of 'critical friend'. They are discussed below beginning with processes within schools.

The participants identified pre and post 'critical friend' meeting de-briefing processes as part of the larger context of the role of 'critical friend'. Preparing for 'critical friend' meetings and following through after the conversations, presents a context in which the 'critical friend's' influence extends beyond her actual contact with school teams. This requires the 'critical friend' to consider how her work with schools influences how time is used within schools. The work that results from her contact with schools is a contextual consideration of the role of 'critical friend'.

The participants referenced the importance and the difficulty in acknowledging, managing and arming voices. The voices that are heard and identifying the voices that are not heard inform the 'critical friends' understanding of a school's issues. The 'critical friends' knowledge of the school context, informed by the representation of voice,

informs the work with which a 'critical friend' engages. This work includes that of assisting school teams in broadening voice beyond the school team. Assisting the school team to identify strategies through which more voices, staff, students and community, can be engaged in the process of school planning and school improvement requires the 'critical friend' to understand the current context of the school and how voice is represented in it.

References to divisional structures, consistency and the tensions inherent in the system also require consideration when examining the context in which the role of 'critical friend' is enacted. In becoming familiar with the context in which the role of 'critical friend' is facilitated, a 'critical friend' model should consider school division structures, the divisional responsibilities of a 'critical friend', perceived tensions within a school community and tensions between school and school division priorities. The structural considerations of role and responsibilities and the reporting mechanisms within a school division inform the context in which schools engage in school improvement. What is the role of school division consultants with schools? Are these roles filled consistently over time allowing these individuals to develop relationships with school personnel? How is the relationship between the superintendent and schools defined? How would this influence the role of 'critical friend'? In addition to the structural considerations, what are the perceived tensions within a school community? What are the tensions between school and school division priorities? Recognizing those tensions can enable a 'critical friend' in effectively facilitating reflective inquiry in a safe and supportive way for individuals within a school team. Paying attention to structures and the degree of consistency in the facilitation of the role of 'critical friend' can increase the likelihood of success for the role.

Participants referenced the shift from the role of ‘critical friend’ being externally facilitated to internally facilitated. The context in which this study took place provided the opportunity to consider the similarities and differences between the role of ‘critical friend’ when facilitated by school division staff with someone from outside the school division and the role of ‘critical friend’ facilitated without that external person. The placement of the ‘critical friend’ within the system in which it operates requires consideration. What lens does the ‘critical friend’ have and how does that lens influence how a ‘critical friend’ works with schools? What is the ‘agenda’ of the ‘critical friend’ and how is that ‘agenda’ influenced by the location of the ‘critical friend’ within the system? When developing a model of ‘critical friend’ it is worthy to consider the structural/system location of the ‘critical friend’.

Lastly is the consideration of processes broader than the role of ‘critical friend’ that facilitate and support a culture of inquiry. The identification of processes such as the High School Teams Meetings and a Book Club, suggests that the process of reflection and inquiry can be supported using multiple strategies, one of which is the role of ‘critical friend’. The role of ‘critical friend’ in organizing networking opportunities between school teams in addition to facilitating ‘critical friend’ conversations enables the ‘critical friend’ to have influence and some degree of control over many processes that inform how schools work. While it is important that the role of ‘critical friend’ not be limited to semi-annual conversations with schools, consideration needs to be given to the ‘critical friends’ ‘agenda’ and the degree of influence the ‘critical friend’ has within the system. As referenced earlier in the chapter, the power a ‘critical friend’ has requires careful consideration as to how that power is used.

The themes informing the contextual factors required for the effective enactment of the role of ‘critical friend’ broaden the scope within which the role of ‘critical friend’ is defined and understood. It identifies that it is not enough to understand the skills and characteristics that a ‘critical friend’ possesses or the strategies that a ‘critical friend’ uses. Attention must be given to the context in which the role of ‘critical friend’ exists. Becoming familiar with the context is a skill the ‘critical friend’ must have. An understanding of the context then informs the strategies and skills a ‘critical friend’ uses.

Researcher Reflection Post-Data Collection

In Chapter One, I reflected upon my perceptions and understanding of the role of ‘critical friend’. It was based on my practical experience as a ‘critical friend’, which occurred through my role as a consultant for an intermediary school improvement organization. I described the process as transformational because I believe it provides space for people to reflect on their work which can result in transformational learning experiences. As educators take time to talk about what they know, their beliefs and values about learning and how their practice does or does not reflect that, the potential exists for individuals to experience dissonance, change and growth. In addition to this, I reflected on how relationships are key, that trust is non-negotiable, the importance of the ‘critical friends’ credibility and the importance of managing the conversation. The data collected through this research does not dispute any of my reflections that were based on my experience as a ‘critical friend’ within this research context.

Having reflected on the role of ‘critical friend’ more systemically and theoretically I have come to the conclusion that in my work, power was conferred upon me by the institutions in which I was operating. I am now tentatively able to acknowledge

and talk about the power that I had as a 'critical friend' within this school division. I use the word 'tentatively' because during the time I spent being a 'critical friend' I tried to discount the power I had so that I was accessible to the schools. While I knew I had power, which I would define as expert and influential power, I also had positional power as a result of the role the school division enabled me to fulfill. I was more comfortable with having expert and influential power. I tried not to work from positional power being careful about how I talked about my ability to access information and resources that would enable the individual schools and the network of schools to engage in certain activities.

My ability to work with schools required me to establish a relationship of trust so that they could talk with me about their challenges. They needed to know that I was not going to share their struggles with other schools or with their assistant superintendent even though I had access to do so. I had these opportunities because I was able to move between the networks within the school division. My ability to move between levels in the system was unique. It afforded me the ability to share information between levels in the system but also to access information and conversations to which both school personnel and school division personnel were not privy.

In reflecting upon my ability to move between networks within the system, I realize how hard I worked on maintaining boundaries. It was important for me not to be a communication conduit between schools or between the high schools and the superintendent. I was purposeful about how I would talk with a school team about the work of another school so that the information I shared would contribute to their thinking. I was careful about how I talked about my working relationship with the superintendent so as not to alienate myself from administrators or teachers. I tried to situate myself

within the network in which I was operating whether that was a meeting with a school team or in a meeting with superintendents. This meant talking with people about their role in operationalizing school improvement based on where they were in the system. In doing so, I tried to be transparent, which meant being open about what I thought should occur and why. I also tried to practice confidentiality, which meant respecting the conversations I had with individuals and teams and what I shared about those conversations. At times, this was a balancing act.

Having facilitated the role of 'critical friend' for many years, I have now begun to acknowledge and talk about the power associated with the role. This not only influences my conclusions and recommendations as found in Chapter Six but also my future practice as a 'critical friend'. My understanding of power together with my belief that the role is one of facilitating transformational learning for educators requires me to be aware of the tensions inherent in the system that can make the role difficult to enact. This renewed awareness on my part will heighten my need to pay attention to power as associated with the role of 'critical friend'.

The Role of 'Critical Friend' in the 'Learning Organization' (Senge, 1990)

The five disciplines of a 'learning organization' being systems thinking, personal mastery, mental models, shared vision and team learning (Senge, 1990) provided a way in which to operationalize the research. A focus group method was used to provide participants with the opportunity to think about their individual assumptions and values to elicit aspects of their mental models of the role of 'critical friend'. Engaging in the research process provided participants with the opportunity to clarify their understanding and assumptions about the role of 'critical friend'. It is each participants' personal vision

of the role of 'critical friend' that was shared within the focus groups and their combined visions that informed the model described here.

As people shared their assumptions and beliefs about the role of 'critical friend' mental models (Senge, 1990) were revealed. Participants talked about what they understood the role of 'critical friend' to be. Teachers said the process provided them with the opportunity to clarify their thinking and the expectation that they would need to articulate the same. School administrators talked about the process being one of leadership development. The school division personnel who were the 'critical friends' to schools talked about the process being one of asking questions and encouraging reflection for school teams. The mental models evoked from the three participant groups provided the opportunity to examine the role of 'critical friend' from different perspectives. The different perspectives opened a variety of considerations. The mental models of individuals and participant groups, permitted the consideration of the role of 'critical friend' organized by different needs, different roles and responsibilities and different expectation the social paradigm of the role of 'critical friend' in school improvement.

The process of questioning that occurred during the focus group conversations mimicked the process of questioning in the 'critical friend' conversations. Only in the focus groups, participants were asked to reflect on the 'critical friend' process. In schools, educators are asked by their 'critical friends' to reflect upon the processes they were using in their schools to set priorities and strategies, how they were implementing the strategies and how they were following through. So while the 'critical friend' process facilitates the process of personal mastery and mental models (Senge, 1990) the research process permitted a reflection on them which added to the development of the role.

Shared vision (Senge, 1990) was created as participants shared their mental models, in the focus groups. The conversations included an opportunity to talk about possibilities as to how the role of 'critical friend' could look in the future. As individuals shared with one another, they built on each other's ideas. It provided the opportunity for a variety of possibilities such as teachers as 'critical friends' and a re-structuring that would allow school division personnel to be 'critical friends' to a group of schools. While it is dependent upon the school division as to how they will use this research to inform their decision making about the role of 'critical friend', the research process did provide an opportunity for teachers, school administrators and school division personnel to inform the decision making process.

Team learning (Senge, 1990) is facilitated by the role of 'critical friend'. This happens over time as teams come to understand the process and are in a 'space of trust' (Green, 2005). This is influenced by the 'pattern of organization' and the 'structure' (Capra, 1996) that facilitates and is facilitated by the 'life process' (Capra) of the 'critical friend'. In terms of the research process, due to the short period of time, a half-hour focus group, the degree of team learning that occurred was minimal.

The 'learning organization' (Senge, 1990) concept was a useful way to operationalize systems thinking in examining the role of 'critical friend'. It provided a way to consider the 'critical friend' process in relation to systems thinking and organizational learning. Because the research process itself paralleled the 'critical friend' process it was possible to use the disciplines of the 'learning organization' to operationalize both the 'critical friend' process and the research process. Asking participants to share their mental models with one another informed the focus group questions. Seeking assumptions and values, identifying what was helpful and unhelpful

and seeking to create a vision, resulted in questions that were focused yet open enough to allow people to explore the social paradigm of the role of 'critical friend'.

Social Constructivist Aspects – Green's (2005) "Spaces of Influence"

The work of Green (2005) provided a lens through which to examine the data in relation to social constructivism. Social constructivism was included in the conceptual framework to examine the social construction of knowledge that occurs during the 'critical friend' process. 'Spaces of influence' (Green, 2005), an elaboration of Vygotsky's zone of proximal development describes the role of 'influential other' as one of engaging with the learner while unaware of what the outcome will be. The 'influential other' parallels the role of 'critical friend' and it therefore seemed appropriate to explore the 'spaces of influence' in relation to the 'life process' (Capra, 1996) of the role of 'critical friend'.

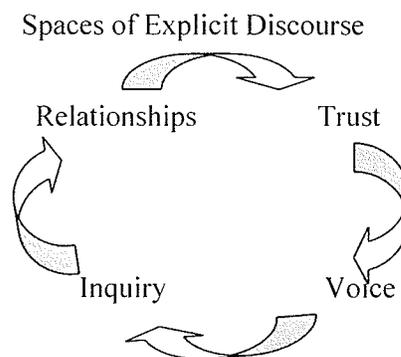
The next section discusses some of the findings in relation to the five 'spaces of influence' (Green, 2005). The five spaces are described as follows. 'Spaces of action' are opportunities in which learners identify how they will address a challenge and are enabled to do so (Green, 2005, p. 301). 'Spaces of explicit discourse' are the opportunities in which learners engage in reflection and inquiry that enable them to clearly identify the "critical elements of a given problem or learning context" (Green, 2005, p. 302). 'Spaces of learning' are opportunities when learners engage in "content knowledge relevant to their learning" (Green, 2005, p. 302). 'Spaces of practice development' are opportunities where learners engage in process (Green, 2005, p. 302). 'Spaces of trust' are times in which learners feel they can take risks without being criticized if the results are not favorable (Green, 2005, p. 304). As the findings are discussed in relation to the 'spaces'

(Green, 2005) questions and considerations for further learning about the role of ‘critical friend’ and the social construction of knowledge by ‘critical friends’ within school improvement are identified.

Space of Explicit Discourse

It is evident that the role of ‘critical friend’ provides an opportunity for teams to engage in a ‘space of explicit discourse’ (Green, 2005, p. 302). This was identified through the Pre-Focus Group Questionnaire, Question Two and in the focus group findings. Within the focus group data, there are four themes that could be considered variables within the ‘space of explicit discourse’. As shown in Figure 3, they are ‘relationships’, ‘trust’, ‘voice’ and ‘inquiry’.

Figure 3: Variables within Spaces of Explicit Discourse



For the ‘critical friend’ to engage with school teams, the ‘critical friend’ and school team members need to develop a ‘relationship’. As was described earlier in the chapter, having a consistent ‘critical friend’ over time enables the development of ‘relationships’. The ‘relationship’ between the critical friend’ and the school team needs

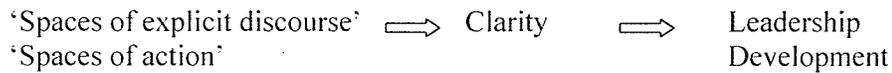
to be premised on 'trust', the second variable. 'Relationships' and 'trust' are required for the role of 'critical friend' to facilitate a 'space of explicit discourse'.

In addition to 'relationships' and 'trust', consideration should be given to the third variable of 'voice'. Whose 'voice' is at the table? Which 'voices' are absent? How does this influence the 'space of explicit discourse'? The fourth variable within the 'space of explicit discourse' is 'inquiry'. The 'space of explicit discourse' is premised on 'inquiry'. It seems to be the 'what' of the 'critical friend' process. When considering these four variables, the question is, what is the interplay between 'relationships', 'trust' and 'voice' that enable 'inquiry' to occur?

Space of Action

Leadership development for teachers was one outcome of the 'critical friend' process identified in this study. As illustrated in Figure 4, leadership development occurs as teachers experience clarity about their work. Clarity is gained through teachers' engagement in 'critical friend' conversations, which facilitate a 'space of explicit discourse'. In addition to achieving clarity through their engagement in a 'space of explicit discourse', teachers may also achieve greater clarity as a result of their actions as leaders within their school. 'Spaces of action' (Green, 2005) are those opportunities where the school team determines priorities and actions and are then enabled to facilitate those actions. Further exploration is required to identify how engagement in 'spaces of explicit discourse' and 'spaces of action' facilitate leadership development for teachers.

Figure 4: Leadership Development within Spaces of Influence

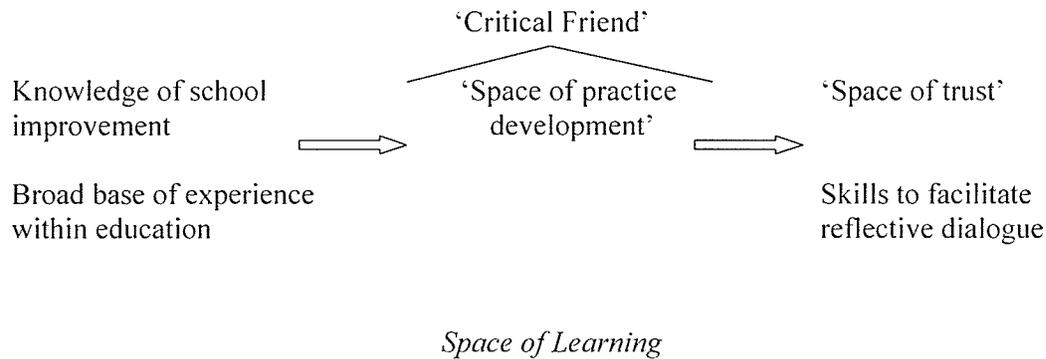


Space of Practice Development

The 'space of practice development' (Green, 2005, p. 302) in relation to this research refers to the school division personnel learning the role of 'critical friend'. As identified in Figure 5, there are multiple considerations when engaging in the practice development of a 'critical friend'. This research affirmed that a 'space of trust' is required for the role of 'critical friend' to be successful. Therefore, those who are entering into the role of 'critical friend' need to be aware of the need to develop a relationship of trust with those to whom they are the 'critical friend'. The research also identified the need for the 'critical friend' to facilitate a reflective process. Therefore, someone engaging in the role of 'critical friend' would need to develop skills that would enable them to do this. In addition to these skills, the research identified inputs that someone engaging in the role of 'critical friend' would need to have. These were knowledge of school improvement processes and a broad base of education.

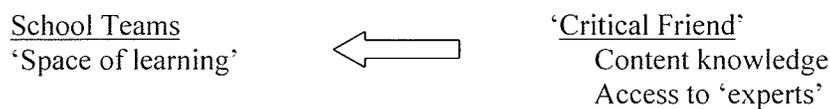
Therefore, when considering the 'space of practice development' for a 'critical friend', consideration would need to be given to the ability to develop trust and facilitative skills that enable school teams to engage in reflection. The process of facilitating a reflective dialogue needs to be informed by the 'critical friends' knowledge of school improvement and their experience within education. When assisting others within their 'space of practice development' in becoming a 'critical friend', consideration should be given to these inputs and outputs.

Figure 5: Space of Practice Development for the Role of 'Critical Friend'



‘Spaces of learning’ are those times where learners engage in learning content knowledge (Green, 2005, p. 302). There was little data that identified school teams engaging in ‘spaces of learning’ with their ‘critical friends’. One of the Pre-Focus Group questions asked participants to express to what extent they felt that the ‘critical friend’ process should focus on discussing content as related to their school plan. Examples were given such as assessment strategies, teaching strategies and philosophies of practice. As indicated in Chapter Four, the responses to this question were diverse. The range of responses could be accounted for by the fact that the ‘critical friend’ process had not had as its focus, content in relation to teaching practice. As will be suggested in Chapter Six, if the role of ‘critical friend’ includes the ‘space of learning’ the ‘critical friend’ must either have that content knowledge or know others who do and who would be willing to engage with the school teams. Figure 6 illustrates the need for the ‘critical friend’ to have content knowledge or access to experts who do.

Figure 6: Role of ‘Critical Friend’ and Content Knowledge



Space of Trust

The 'space of trust' (Green, 2005, p. 304) is essential to the effective enactment of the role of 'critical friend'. The importance of trust within the 'critical friend' relationship is identified repeatedly throughout the data. As illustrated in Figure 7, the ability for the 'critical friend' to establish trust with school teams is the foundation upon which the role of 'critical friend' rests. This is informed by the degree of consistency in 'critical friend', attention to the power relationships within the 'critical friend' process and the divisional responsibilities when the role of 'critical friend' is internally facilitated. Working within a 'space of trust' allows the 'critical friend' to practice the role of 'critical friend'. Working within a 'space of trust' allows members of a school team to engage in inquiry and reflection about their work. Without trust, the role of 'critical friend' cannot operate based on the description that was generated by the research and validated within the literature.

Figure 7: Trust as a Foundation for the Role of 'Critical Friend'



Summary of 'Green's (2005) 'Spaces of Influence'

Incorporating 'spaces of influence' (Green, 2005) into the conceptual framework provided the opportunity to examine the data in relation to the social construction of knowledge. As is evident from the research, the role of 'critical friend' is a socially constructed process. 'Spaces of influence' (Green, 2005) provided a theoretical lens

through which to better understand that social process. While further exploration could be done using the 'spaces of influence', the interpretation of the data provides a foundation from which to further explore the social construction of knowledge facilitated through the role of 'critical friend' in school improvement.

Chapter Summary

The chapter began with a reflection on power within the role of 'critical friend'. It demonstrated that while power can enable the role of 'critical friend' to function within a system, power can also create barriers to a 'critical friend' process that is focused on facilitating transformational learning for educators. The chapter then discussed the themes that inform the important elements and the contextual factors that define a social paradigm of the role of 'critical friend' in school improvement by identifying the themes that were found in the four diverse models of 'critical friend' (Dunne et al., 2000; MSIP, 2005b; Stiegelbauer et al., 2005; Swaffield, 2002) as described in Chapter Two and the themes identified in this research. This identified points for consideration when developing a 'critical friend' model. In addition to this, the chapter provided my reflection, post data collection that revealed my increased awareness of the necessity to pay attention to power and the role of 'critical friend'. The consideration of social spaces (Green, 2005) provided the opportunity to explore the findings in relation to the social construction of knowledge and in doing so, identified considerations for the development of the role and models of 'critical friend'.

The next chapter draws conclusions about this research, acknowledges the limitations and identifies possible areas for future exploration. While this study accomplished its stated purpose, to describe a social paradigm of the role of 'critical

friend', there is more to learn about how the role functions and how it is defined by investigating the 'pattern of organization', 'structure' and 'life process' (Capra, 1996). Consideration of the role of 'critical friend' within the context of the system in which it exists requires the consideration of the complexities involved in facilitating the role of 'critical friend' within the nested networks of such a dynamic living system.

CHAPTER SIX: SUMMARY, CONCLUSIONS, LIMITATIONS AND RECOMMENDATIONS

This chapter provides a summary of this study that pursued the research question, what is the social paradigm of the role of 'critical friend' in school improvement? Following the summary are conclusions, limitations, recommendations and final thoughts. The chapter begins with a summary of the research.

Summary

Rooted in school improvement (Fullan, 2001, 2003, 2005b; Fullan & Hargreaves, 1991; Fullan & Stiegelbauer, 1992), situated within a partnership between a large urban school division in Manitoba, Canada and an intermediary school improvement organization, this participatory action research examined the data from twelve educators as they shared their mental models (Senge, 1990) of the role of 'critical friend'. Examining four diverse models of 'critical friend' (Dunne et al., 2000; MSIP, 2005b; Stiegelbauer et al., 2005; Swaffield, 2002) found in the school improvement literature allowed for the identification of themes in this study evident in the existing literature of 'critical friend' and themes introduced in this research. What was found was that important elements and contextual factors of the role of 'critical friend' as identified in the data were both found in the literature and introduced through this research.

The three essential elements of a living system, 'pattern of organization', 'structure' and 'life process' (Capra, 1996) provided a way to organize the system in which the research took place and identify some of the nested networks associated with the role of 'critical friend'. The premise of conceptualizing knowledge as contextual and

not analytical as found in the work of Capra (1996) required that the examination of the role of 'critical friend' occur within the context of the larger whole. Therefore, analyzing the participants' response to the questions needed to occur with consideration of the nested networks engaged in and effected by the 'critical friend' process. What were the important elements and contextual factors common to teachers, administrators and school division personnel? What were the emergent properties (Capra, 1996)?

The disciplines of mental models and building a shared vision (Senge, 1990), two components of a learning organization, contributed to the operationalization of the concepts. This informed the questions that participants were asked during the focus groups. What is it that a 'critical friend' does? What are the most important characteristics and skills that a 'critical friend' must have? What does a helpful/unhelpful 'critical friend' conversation look like? What were the strengths and limitations of the Critical Friends Team (CFT)? What are the considerations when thinking about a model of 'critical friend' into the future? The responses to these questions informed the social paradigm of the role of 'critical friend' in school improvement within this research context.

Examining the data in consideration of the social constructivist framework, in particular 'spaces of influence' (Green, 2005), provided an opportunity to examine the social construction of knowledge that occurs during the 'critical friend' process. The examination of the findings using social constructivism (Green, 2005) and systems thinking (Capra, 1996; Senge, 1990) raised many questions. Questions such as those following could contribute to an ongoing pursuit of the social paradigm of the role of 'critical friend'.

- What is a 'space of explicit discourse' and how does operating in that space develop leadership capacity for teachers?

- What are the dynamics between ‘relationships’, ‘trust’, ‘voice’ and ‘inquiry’ and how do they enable a ‘space of explicit discourse’?
- What are the conditions that enable teachers to engage in ‘spaces of action’ and how does engaging in ‘spaces of action’ contribute to leadership development?
- What considerations need to be given to ‘pattern of organization’, ‘structure’ and ‘life process’ so that the role of ‘critical friend’ can operate effectively?
- What tensions exist within the context in which a ‘critical friend’ operates?
- How does one learn to be a ‘critical friend’? What does the ‘space of practice development’ for someone learning to be a ‘critical friend’ look like?
- How would the role of ‘critical friend’ change if teachers were ‘critical friends’ to one another? Would a teacher be better able to develop trust with teachers as their ‘critical friend’?

All of these questions illuminate the need for further inquiry if the role of ‘critical friend’ is to be better understood. As the participants in this study stated, *having to articulate* (Teacher) their work to someone else, identifying “*the question*” as *the most important thing* (Teacher), having a focus on *leadership and learning* (Administrator) and recognizing the *inquiry component* (Division Personnel) describe why *schools have benefited in so many ways* (Administrator). The concern expressed through the data that the role of ‘critical friend’ needs to be clearly understood by all those engaging with the role reinforces the need for a context that facilitates that understanding. This is important for those who want to engage with this role within their own contexts.

Conclusions

The effective enactment of the role of 'critical friend' requires an understanding of the operationalization of power in relation to the role. The effective enactment of the role of 'critical friend' requires a common understanding of the role by all those participating with the role. The effective enactment of the role of 'critical friend' requires an understanding of knowledge as conceptual. The effective enactment of the role of 'critical friend' is 'critical'. The conclusions are discussed below beginning with the operationalization of power in relation to the role of 'critical friend'.

Power in Relation to the Role of 'Critical Friend'

The role of 'critical friend' is one of power and influence. As this study demonstrated, the role of 'critical friend' within the context of school improvement is situated within nested networks that comprise a school system. The 'critical friend's' position whether external or internal to a school division has power associated with the role. The 'critical friend's' power may reside in their expertise, their influence or their position. Where the 'critical friend' is situated within the system should influence the questions a 'critical friend' asks. It may also influence the responses that a school team provides.

Although the role of 'critical friend' is described as one of facilitating reflection so that teachers can celebrate and critique their own work, the 'critical friend' influences the reflection by the questions she asks and the research she shares. The 'critical friend's' influence has implications for what school teams talk about, what they spend time doing and how school leaders function within their schools. The role of 'critical friend' is

therefore very influential and very powerful. Who the 'critical friend' is and what the 'critical friend' talks about will determine whether the role of 'critical friend' facilitates transformational learning for school improvement or another system agenda.

Power is also a consideration in reference to the composition and the operationalization of school teams. Which teachers comprise the school team and how they function within their school is a reflection of how power is operationalized through school teams. As the data identified, attention to which voices are represented in the school team and how the school team invites voice from their colleagues provides the 'critical friend' with some insight into how power is used within schools. The process of the role of 'critical friend' is to reflect, problem solve and plan. The 'critical friend' should therefore pay attention to whom is privy to the process.

The Role of 'Critical Friend' must be Clearly and Commonly Understood

In pursuing the research question within the conceptual frame of systems thinking (Capra, 1996; Senge, 1990) it became evident that if the role is not clearly defined within all networks in the system, the role may not function well. If all those engaged with the role do not have a common understanding of it the process of inquiry that is facilitated through the process could be stifled. It is therefore important that those directly involved in or supporting the process of 'critical friend' talk about their understanding of the role of 'critical friend' and what the purpose of it is. The ability for individuals such as school division personnel to enact the role of 'critical friend' and the ability of school personnel to interact with someone in that role requires this.

When defining the role of 'critical friend' it is important to define 'critical'. In using the work of Earl et al., (2005) 'critical' can be defined as asking questions to probe

thinking and uncover underlying assumptions about practice. 'Critical' defined in this way, requires a context in which relationships of trust are the means through which the 'critical' nature of 'critical friend' can operate. 'If 'critical' is defined as 'essential' (Earl et al., 2005) that begs the question, 'essential' for what? Essential to maintain the 'pattern of organization', 'structure' and 'life process' as it presently exists or to explore what the system could become? Earl et al., (2005) suggests that both definitions of 'critical', 'probing' and 'critical', 'essential', can coexist. This research suggests that 'critical', 'essential' must also be defined.

The Role of 'Critical Friend' Operates Best within a System that does not Assume Knowledge

If the role of 'critical friend' is to facilitate transformational learning among educators, it requires that knowledge be understood as conceptual and not analytical. As the 'critical friend' asks purposeful questions to assist school teams in the process of reflecting on their work, school teams are able to clarify issues and engage in problem solving. As administrators and teachers engage in this process, they can achieve clarity about their work, providing them with the opportunities to celebrate that which is working and to investigate that which is not working well. This requires the 'critical friend' to assist school teams as they navigate the tensions within the system. Through this process of exploration, the 'critical friend' does not assume that they will have the answers the school needs, but is prepared to assist the school as the school determines what will work best for them and their students. The 'critical friend' is prepared to be a partner in learning with school teams.

A 'Critical Friend' is 'Critical'

The data showed that the role of 'critical friend' within this context was 'critical' as in 'essential'. The teachers and administrators talked about how they valued the 'critical friend' conversations. The conversations helped them follow through on their school plans. The process assisted them as they reflected on the work they were doing. As a result of the 'pressure and support' the school teams received from their 'critical friend', they were better able to follow through with their school planning process.

The data showed that the role of 'critical friend' was 'critical', as in 'probing'. Teachers talked about gaining increased clarity about their work, as a result of their conversations with their 'critical friend'. The potential for this increased clarity must be considered however with the fact that the role of 'critical friend' is bound by the system in which it operates. Therefore, to what degree can the 'critical friend' ask probing questions? Is it possible for the role of 'critical friend' to ask the type of questions that are required for people to engage in transformational learning? To address these questions, consideration needs to be given to the context and the system attributes within which the role of 'critical friend' operates. Who is the 'critical friend'? What is the topic that requires probing? What are the political considerations and the structural restraints relevant to the topic? What are the implications for teachers and administrators if they engage in 'critical' debate about certain topics? Consideration needs to be given to the 'spaces' in which the role of 'critical friend' operates. As was previously suggested, this is an area for further study.

Limitations

One of the limitations of the research, as addressed in Chapter Two, was in relation to systems thinking. To truly understand the role of 'critical friend' within a school system, further exploration would need to be conducted to understand how the role influenced parts of the system that were not accessed in this research. Examples of this would include further exploration of the degree to which the role of 'critical friend' contributed to the roles and responsibilities of school division personnel and the role of assistant superintendents in defining and supporting the role of 'critical friend'. The questions that were asked and the participants that were included in the study limited the scope of the research that involved teachers, administrators and school division personnel. While this needed to occur to make the research manageable it limited the examination to only certain networks within the school division therefore limiting the analysis using systems thinking.

In reference to using PAR as the methodology, this research was limited due to the access the researcher had to involve school and school division personnel in the planning and analysis stages of the research process. Engaging teachers, administrators and school division personnel more fully in the research process, would have provided them the opportunity to further develop their understanding of the research process and of the data. They would have had an opportunity to shape how the data was analyzed and talked about. Having said that, it may have been difficult to engage teachers, administrators and school division personnel more fully in the research process even if access had been granted because it is a very time consuming process and time is a limited resource within the living system of education.

Time, a limited resource, was a limitation in terms of focus group participation. The opportunity was provided for sixteen teachers, eight administrators and eight school division personnel for a total of thirty-two participants, to participate in the focus groups. In total there were twelve participants among the four focus groups, three participants per group. The researcher received feedback that some individuals would have participated but the focus group schedule did not allow them to due to work and personal commitments.

The final limitation discussed in this section is that of the research being informed through limited perception. The perception was limited on two levels. One, there were only twelve individuals who participated in the focus groups. Were they an adequate representation of all the people who had been engaged in the 'critical friend' process? What about other people who had been involved in the 'critical friend' process? Would their mental models (Senge, 1990) have changed the results? Two, it is difficult for people to think beyond that which they know. A limitation of the research was that the focus group participants talked about the role of 'critical friend' from their experience with it. To truly explore how the role of 'critical friend' could operate differently; individuals would need to think beyond their experiences. While this was explored by asking participants to consider the role of 'critical friend' in the future, it is difficult to consider possibilities beyond that which we have already experienced.

Recommendations

Five recommendations are discussed in relation to these research findings. Four recommendations are with reference to the operationalization of a 'critical friends' model. They include the importance of a common understanding of the role of 'critical friend',

the skill set and mind set of a 'critical friend', the necessity for a 'space of trust' and using the 'critical friend' research when developing a 'critical friend' model. The fifth recommendation refers to the continued elaboration of the conceptualization of the role of 'critical friend'.

Operationalization - Common Understanding

Prior to the enactment of the role of 'critical friend' within a system, those engaged with the role of 'critical friend' must come to a common definition of the role's intent and purpose. As recommended to the school division, in which this research occurred, this requires all school and school division personnel either supporting or enacting the role of 'critical friend' to have a common understanding as to the purpose and process of it. This can be established through dialogue within all networks in the school division and ongoing and consistent training and development for those who acquire the role of 'critical friend'. Without this common understanding, the role of 'critical friend' facilitating inquiry and reflection, which enables educators to engage in adult learning, may be compromised.

Operationalization - Skill Set and Mind Set of a 'Critical Friend'

The findings identified some of the characteristics, knowledge and skills required for the effective enactment of the role of 'critical friend'. In facilitating a 'critical friend' model within a school system, the following should be considered when identifying who will be the 'critical friends'. The role of 'critical friend' requires someone who has the maturity to operate within multiple levels within a school system. This requires the 'critical friend' to engage with superintendents to talk about the 'big picture', the purpose

of the 'critical friend' process and to assist in exploring and developing other processes that support the development of a culture of inquiry within a school system. It requires that the 'critical friend' be prepared to engage with schools over a period of time so that relationships of trust can be established. It requires that the 'critical friend' understand school improvement processes and has a working knowledge of educational practices including provincial and divisional priorities. This is required so 'critical friends' can assist schools, either directly or indirectly in facilitating processes that influence student learning and engagement. Individuals engaging with schools as a 'critical friend' understand that the process facilitates transformational learning in which educators examine their own work for the purpose of celebration and critique. Individuals engaging in the role of 'critical friend' understand that 'voice' is central to the process. While the process of the role of 'critical friend' facilitates adult learning, the purpose is to influence student learning and engagement. The characteristics, knowledge and skills as described above would provide the basis for selection criteria when identifying individuals who become 'critical friends'.

Operationalization - 'Space of Trust'

The operationalization of the role of 'critical friend' requires that it be facilitated within a 'space of trust' that is developed over time. As suggested to the school division, nurturing a 'space of trust' between 'critical friends' and schools enables 'critical friends' and school teams to engage in 'spaces of action', 'spaces of learning', 'spaces of practice development' and 'spaces of explicit discourse' (Green, 2005). A mutual relationship of trust in which the 'critical friend' is transparent about the purpose and process of her engagement with schools enables the 'critical friend' in effectively practicing the role. A

mutual relationship of trust also enables teachers and administrators to engage in a 'space' where they can examine their practice and engage in celebration and critique. Therefore, when creating a 'critical friend' model, attention to the ability of a 'critical friend' to establish trust with school teams is paramount.

Operationalization – Dissemination of the Research Findings

To assist others in their conceptualization of the role of 'critical friend' in school improvement requires that the research findings be disseminated. Sharing this research would provide educators who might want to engage in a 'critical friend' process with the foundation from which to create a 'critical friend' model. The information that would assist school systems in developing a 'critical friend' model would include the mind set and skill set of a 'critical friend' as previously discussed. It would also include consideration of a context that would allow for consistency in who enacts the role of 'critical friend', the 'critical friends' position within the system, and processes beyond that of the role of 'critical friend' that would support the development of a culture of inquiry. Disseminating the findings to illustrate the practicality of the important elements and the contextual factors would provide educators with a basis from which to create a 'critical friend' model conducive to their own context.

Conceptualization – Future Research

An understanding of the socially constructed role of 'critical friend' is incomplete. The questions posed at the beginning of this chapter in relation to the 'spaces of influence' (Green, 2005) are evidence of this. A recommendation for future research would be to explore the literature with consideration of 'spaces of influence' (Green,

2005) and the literature on communities of practice. Using the work of Green (2005) more prominently in the conceptual framework would provide for a more in-depth exploration about how the role of 'critical friend' engages in social spaces.

In thinking about what methods could be used to further pursue the social paradigm of the role of 'critical friend', a deeper understanding of the role of 'critical friend' could be gained by conducting interviews with individuals engaged in the 'critical friend' process in different models. A study that would follow participants over a two to three year period could provide an in-depth analysis of the experiential models shared by those engaged with the role of 'critical friend. This would inform an evolving social paradigm of the role of 'critical friend' in school improvement and contribute to the existing school improvement literature.

An extension of this study would include the examination of a 'critical friend' model situated within and facilitated by a school division. In such a model there could be two levels of 'critical friends'. The first level would consist of superintendents as 'critical friends' to the school administrators. In meeting together two to three times a school year, superintendents would talk with school administrators about the work within which their school is engaged. Through that process, superintendents would assist administrators in reflecting upon and celebrating the strengths within their school in addition to identifying problems and ways to address the problems. The second level would engage school division consultants such as student services and curriculum experts in the role of 'critical friend' to school teams. This could be structured so that teams of consultants with varying expertise work with a group of schools. They would work with schools within their areas of expertise (student services, curriculum) and as 'critical friends'. This would allow school division personnel to familiarize themselves with a small group of schools, which

would enable them to better assist, the schools in their work. It would also assist school division personnel in creating a professional development model based on the schools' needs. The operationalization of such a model and the examination of it would further contribute to an emerging social paradigm of the role of 'critical friend' in school improvement.

Final Thoughts

The implication that the role of 'critical friend' within school improvement is one of facilitating transformational learning suggests that the role can be conceptualized as a resource to support adult learning and organizational development. While the 'critical friend' may introduce research to assist schools in working through their challenges, he or she may also amplify system attributes through positive feedback to encourage and facilitate the expansion or elaboration of current practice. This places the 'critical friend' in a position of power and influence as she chooses the questions that facilitate reflection which can result in adult learning in addition to the research which in turn may influence the practices of schools. The essential and probing nature of the role of 'critical friend' requires that those enacting the role and those engaging with the role, teachers and administrators, be cognizant and discriminating about the influence of the 'critical friend'.

Conceptualizing the role of 'critical friend' within a living system (Capra, 1996) provides the latitude to think about the complexities, implications, barriers and potential of the role. It requires that consideration be given not only to the characteristics, skills and knowledge that a 'critical friend' possesses, but the context in which the role of 'critical friend' is enacted. This research contributes to the ongoing conceptualization of the role of 'critical friend' in school improvement with consideration of the salient elements and

contextual factors that enable the role to be effectively enacted. This study therefore becomes part of the living system that defines the role of 'critical friend', in which the role of 'critical friend' lives.

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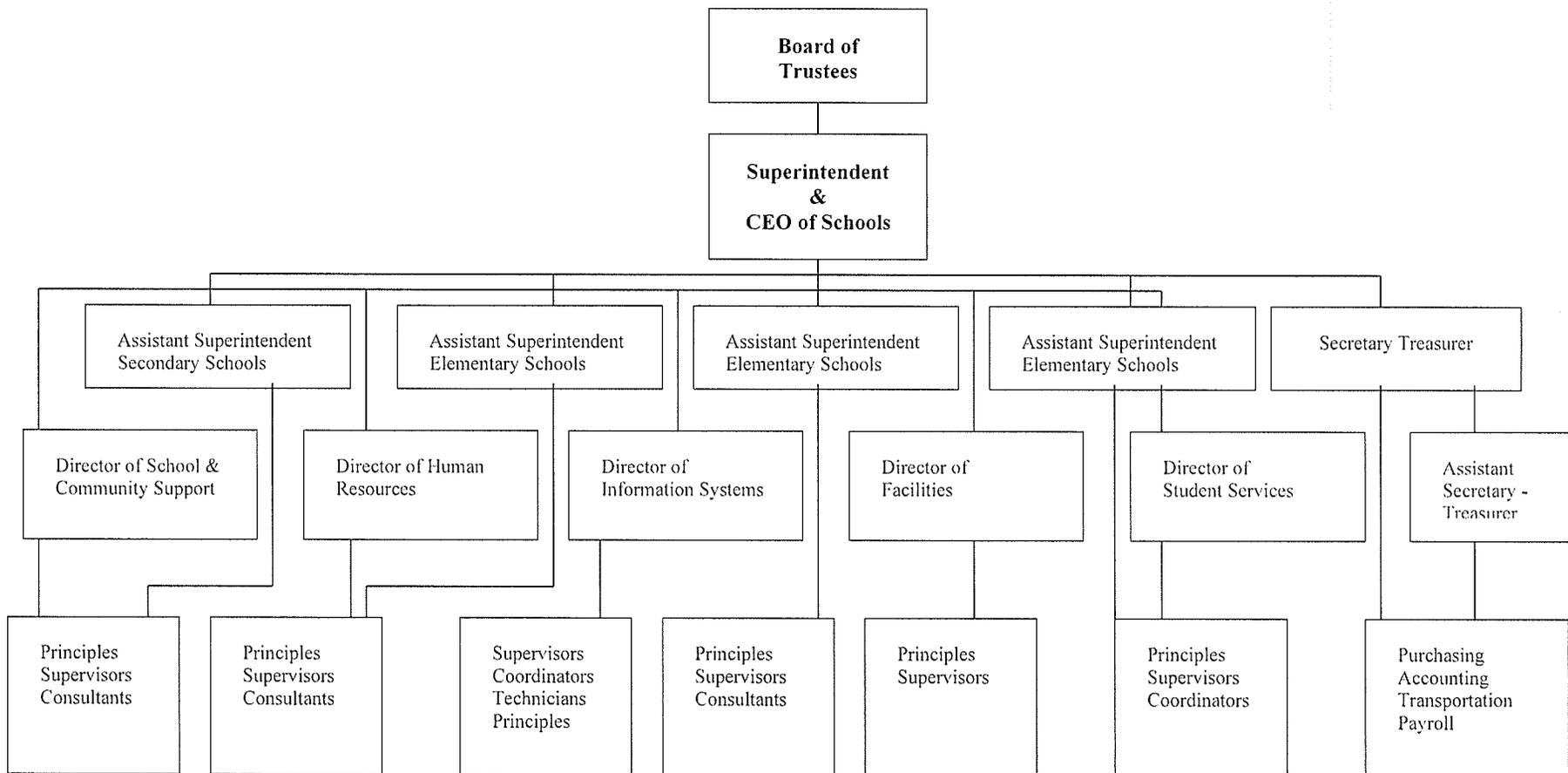
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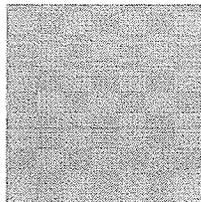
APPENDIX A – SCHOOL DIVISION ORGANIZATIONAL CHART

School Division Organizational Chart



APPENDIX B – SCHOOL DIVISION LETTER OF CONSENT

School Division Letter of Consent



December 5, 2006

To Whom It May Concern:

In my capacity as Superintendent of Schools & CEO of the [REDACTED] School Division, I hereby give my written consent for Shannon Leppy to conduct a study on the role of "critical friend".

It is my understanding that the study will involve the participation of school and divisional personnel who will provide written consent to participate in the study via the process of focus groups.

It is also my understanding that Shannon will use this research for her Master's thesis, and that she will be writing a report for the [REDACTED] School Division based on her findings.

Yours truly,

[REDACTED] Superintendent of Schools & CEO of the [REDACTED] School Division



APPENDIX C – LETTERS OF INVITATION

Focus Group Letter of Invitation for Teachers

Date

To high school teachers who have been involved in the Critical Friend Team school meetings;

The school division is presently in the process of examining the role of 'critical friend'. As you are aware, in the past few years this role has been facilitated by a MSIP consultant together with two division personnel. They have made up the "Critical Friend Team" (CFT). The 'critical friends' team, have visited schools two times a year to meet with school planning teams. This has been part of the service provided to the high schools to support the school planning and school improvement process. In an effort to inform the role of 'critical friend' within the school division, the school division has granted me permission to conduct research in this area. This research will also be used for my Master's thesis.

Data will be gathered by conducting four focus groups. There will be two focus groups of teachers, one focus group of high school administrators and one focus group of division personnel who have been 'critical friends' to schools. The purpose of having two teacher focus groups is due to the fact that more teachers than administrators or division personnel have been involved in the process. The purpose of conducting Focus Groups based on people's position in the system, is to provide an opportunity for emerging properties to present themselves as systems thinking has been used to frame this study. Each Focus Group would have a maximum of eight participants. This would allow for two teachers from each high school, one administrator from each high school and all participating school division personnel to participate in the research. Participating teachers will have the opportunity to provide additional information after the Focus Group session via a phone interview with the principal researcher if they so choose, until January 30, 2007.

All teachers who agree to participate in a focus group will remain anonymous. Participating teachers will not be identified in the transcripts nor will their identities be used in any written materials. Participating teachers will be asked to sign a letter of consent stating that s/he understands the purpose of the research and to also sign a letter of confidentiality. Participants will be able to withdraw from the research at any time without penalty or negative consequence.

The desired time to conduct the focus groups is the week of January 15th, 2007, which follows the week of the Provincial English exam and is prior to Semester One exams in the high schools. The teacher focus groups will be conducted the week of January 15, 2007 from 4:30 to 6:00 p.m. The dates for these focus groups will be either Monday, January 15th or Wednesday, January 17th. You will be informed of the date for your Focus Group, the week of January 8th. The focus group conversation will be audiotaped. My

research assistant [REDACTED] will facilitate the Focus Groups. I, as the principal investigator will observe the Focus Group and take Field Notes during the conversation. A hired data transcriber will transcribe the audiotapes. The transcriptions will be coded to assure the anonymity of the participants. Upon completion of the research, the consent forms, the letters of confidentiality, the tapes, the questionnaires, the field notes and the transcripts will be destroyed. During the duration of the research all materials associated with the participants (consent forms, letters of confidentiality, questionnaires, field notes, transcripts and tapes) will be kept in a locked filing cabinet in the office of the principle investigator.

If you are interested in participating in the teacher focus group, please sign the letter of consent, returning it to me in the stamped, self addressed envelop postmarked by Friday, December 22, 2006. Please retain a copy of the letter of consent for your records.

If you have any questions about the study or the focus group process, please call me at [REDACTED] or email at [REDACTED]. I appreciate your consideration of this matter!

Sincerely,

Shannon Leppky

Focus Group Letter of Invitation for High School Administrators

Date

To high school administrators who have been involved in the Critical Friend Team school meetings;

The school division is presently in the process of examining the role of 'critical friend'. As you are aware, in the past few years this role has been facilitated by a MSIP consultant together with two division personnel. They have made up the "Critical Friend Team" (CFT). The 'critical friends' team has visited schools two times a year to meet with school planning teams. This has been part of the service provided to the high schools to support the school planning and school improvement process. In an effort to inform the role of 'critical friend' role within the school division, the school division has granted me permission to conduct research in this area. This research will also be used for my Master's thesis.

Data will be gathered by conducting four focus groups. There will be two focus groups of teachers, one focus group of high school administrators and one focus group of division personnel who have been 'critical friends' to schools. The purpose of having two teacher focus groups is due to the fact that more teachers than administrators or division personnel have been involved in the process. The purpose of conducting Focus Groups based on people's position in the system, is to provide an opportunity for emerging properties to present themselves as systems thinking has been used to frame this study. This would allow for two teachers from each high school, one administrator from each high school and all participating school division personnel to participate in the research. Participating administrators will have the opportunity to provide additional information after the Focus Group session via a phone interview with the principal researcher if they so choose, until January 30, 2007.

All administrators who agree to participate in a focus group will remain anonymous. Participating administrators will not be identified in the transcripts nor will their identities be used in any written materials. Participating administrators will be asked to sign a letter of consent stating that s/he understands the purpose of the research and to also sign a letter of confidentiality. Participants will be able to withdraw from the research at any time without penalty or negative consequence.

The desired time to conduct the focus groups is the week of January 15th, 2007, which follows the week of the Provincial English exam and is prior to Semester One exams in the high schools. The administrator focus group will be conducted on Thursday, January 18th, 2007 from 4:30 to 6:00 p.m. You will be contacted the week of January 8th, 2007 regarding the exact location. The focus group conversation will be audiotaped. My research assistant [REDACTED] will facilitate the Focus Groups. I, as the principal investigator will observe the Focus Group and take Field Notes during the conversation. A hired data transcriber will transcribe the audiotapes. The transcriptions will be coded

to assure the anonymity of the participants. Upon completion of the research, the consent forms, the letters of confidentiality, the tapes, the questionnaires, the field notes and the transcripts will be destroyed. During the duration of the research all materials associated with the participants (consent forms, letters of confidentiality, questionnaires, field notes, transcripts and tapes) will be kept in a locked filing cabinet in the office of the principle investigator.

If you are interested in participating in the administrator focus group, please sign the letter of consent, returning it to me in the stamped, self addressed envelop postmarked by Friday, December 22, 2006. Please retain a copy of the letter of consent for your records.

If you have any questions about the study or the focus group process, please call me at [redacted] or email at [redacted]. I appreciate your consideration of this matter!

Sincerely,

Shannon Leppky

Focus Group Letter of Invitation for School Division Personnel

Date

To division personnel who have participated as 'critical friends' on the CFT,

The school division is presently in the process of examining the role of 'critical friend'. As you are aware, in the past few years this role has been facilitated via the Critical Friends Team (CFT). As a CFT, we have visited schools two times a year to meet with school planning teams. This has been part of the service provided to the high schools to support the school planning and school improvement process. In an effort to inform the 'critical friend' role within the school division, the school division has granted me permission to conduct research in this area. This research will also be used for my Master's thesis.

Data will be gathered by conducting four focus groups. There will be two focus groups of teachers, one focus group of high school administrators and one focus group of division personnel who have been 'critical friends' to schools. The purpose of having two teacher focus groups is due to the fact that more teachers than administrators or division personnel have been involved in the process. The purpose of conducting Focus Groups based on people's position in the system, is to provide an opportunity for emerging properties to present themselves as systems thinking has been used to frame this study. This would allow for two teachers from each high school, one administrator from each high school and all participating school division personnel to participate in the research. Participating division personnel will have the opportunity to provide additional information after the Focus Group session via a phone interview with the principal researcher if they so choose, until January 30, 2007.

The division personnel who agree to participate in a focus group will remain anonymous. Participating division personnel will not be identified in the transcripts nor will their identities be used in any written materials. Participating teachers will be asked to sign a letter of consent stating that s/he understands the purpose of the research and to also sign a letter of confidentiality. Participants will be able to withdraw from the research at any time without penalty or negative consequence.

The desired time to conduct the focus groups is the week of January 15th, 2007, which follows the week of the Provincial English exam and is prior to Semester One exams in the high schools. The focus group for division personnel will be conducted on Tuesday, January 16, 2007 during regular working hours. It will be 1 to 1 1/2 hours in length. The exact time and location will be sent to participating division personnel the week of January 8, 2007. The focus group conversation will be audiotaped. My research assistant [REDACTED] will facilitate the Focus Groups. I, as the principal investigator will observe the Focus Group and take Field Notes during the conversation. A hired data transcriber will transcribe the audiotapes. The transcriptions will be coded to assure the anonymity of the participants. Upon completion of the research, the consent forms, the

letters of confidentiality, the tapes, the questionnaires, the field notes and the transcripts will be destroyed. During the duration of the research all materials associated with the participants (consent forms, letters of confidentiality, questionnaires, field notes, transcripts and tapes) will be kept in a locked filing cabinet in the office of the principle investigator.

If you are interested in participating in the division personnel focus group, please sign the letter of consent, returning it to me in the stamped, self addressed envelop postmarked by Friday, December 22, 2006.

If you have any questions about the study or the focus group process, please call me at [redacted] email at [redacted]. I appreciate your consideration of this matter!

Sincerely,

Shannon Leppky

APPENDIX D - CONSENT FORM AND LETTER OF CONFIDENTIALITY

CONSENT FORM

High School Teachers, High School Administrators and Division Personnel

Research Project Title: Conceptualizing the Role of Critical Friend within the Context of School Improvement.

Study's Researchers: Principal Investigator: Shannon Leppky, Graduate Student, Faculty of Education, University of Manitoba (UoM), with Dr. Marlene R. Atleo, EAF&P, Faculty of Education, University of Manitoba. 474-6039.

This consent form, a copy of which will be left with you for your records and reference, is required as part of the process of informed consent. It should give you the basic idea of what the research is about and what your participation will involve. If you would like more detail about something mentioned here, or information not included here, you should feel free to ask. Please take the time to read this carefully and to understand any accompanying information.

I. A description of the purpose of the study.

The overall purpose of this qualitative research study is to identify how people who have been involved in the Critical Friend Team process in the school division, perceive and describe the critical friend process. This will assist the researcher in answering the questions, what are the important elements that begin to define the role of critical friend and what are the contextual factors required for the role of critical friend to be effective? This will require the involvement of high school teachers and high school administrators who have been involved in the Critical Friend Team process, as well as division personnel who have been critical friends on the Critical Friends Team. This research is being done towards the completion of the researcher's Masters of Education degree.

II. A description of the procedures.

Four groups of participants will be recruited for the study: two focus groups of high school teachers, one focus group of high school administrators, and one focus group of division personnel who have been critical friends. If you decide to take part in the study you will be in a focus group of peers that will be facilitated by a research assistant, [REDACTED]. The principal investigator will observe and take field notes during the conversation. In the focus group will be asked to talk about your views and experiences with the critical friend process as it has been facilitated in the past four years within the school division. At the completion of each focus group, the principal investigator will extend an invitation for individuals to contact her up until January 30, 2007 should they wish to provide additional comments. This can be done via a phone conversation.

The focus group should take 1 to 1 1/2 hours to complete. The focus groups will be facilitated the week of January 15th, 2007. The teacher and administrator focus

groups will be facilitated after school hours, beginning at 4:30 p.m. The focus group with division personnel will be facilitated during working hours. The focus groups will be facilitated at a location that is agreed upon by the participants. The principal investigator will contact you the week of January 8th with the exact date and time of your focus group. All focus groups will be tape recorded and later transcribed by a hired data transcriber.

- III. Voluntary nature of the study.
Your participation is voluntary. Even if you decide to participate, you may withdraw at any time and/or refrain from answering any questions you prefer to omit, without prejudice or consequence. Your decision about whether or not to participate will NOT affect your status as a school division employee.
- IV. A description of the risks.
If you decide to participate in this research there will be no undue risk to you. You will not experience any harm that is greater than the harm you might experience in the normal conduct of your everyday life. Should you feel uncomfortable at anytime, the focus group will be stopped and resumed when you are feeling comfortable to do so.
- V. A description of the benefits.
There are also no known direct benefits for you if you decide to participate. However, this study will result in knowledge that may be used to develop and refine the critical friend process within the school division which may benefit the work with which you are involved.
- VI. A description of any recording devices to be used.
The focus groups will be tape-recorded. Two tape recorders will be used should one malfunction. Upon completion of the transcription and coding, the tapes will be destroyed.
- VII. Measures to protect confidentiality.
All information gathered will be kept confidential. That means that your name, address, or any information that could identify you will not appear on the focus group transcripts, interviewer notes, presentations about the study, or in future publications. Code numbers in replace of names will be used on all sources of data. During the duration of the research all materials associated with the participants (consent forms, letters of confidentiality, questionnaires, field notes, transcripts and tapes) will be kept in a locked filing cabinet in the office of the principle investigator. Only Shannon Leppky and her Committee members, Dr. Marlene Atleo, Dr. Carolyn Crippen and Dr. Roberta Woodgate will have access to this information. Upon completion of the study, all data including consent forms, tapes, questionnaires, transcripts, and field notes will then be destroyed.

VIII. The research findings.

Findings from this study may be presented at research conferences and published in professional journals. In all instances, your identity would not be discussed or revealed to anyone. The findings will also be included in a report to the school division. If you are interested in receiving a summary of the findings you may sign below.

Your signature on this form indicates that you have understood to your satisfaction the information regarding participation in the research project and agree that you will participate as a subject. In no way does this waive your legal rights nor release the researcher, and involved institutions from their legal and professional responsibilities. You are free to withdraw from the study at any time, and/or refrain from answering any questions you prefer to omit, without prejudice, or consequence. Your continued participation should be as informed as your initial consent, so you should feel free to ask for clarification or new information throughout your participation.

Each Focus Group will have a maximum of eight participants. This would allow for a maximum of two teachers from each high school, one administrator from each high school and all division personnel who have been involved in the Critical Friend Team process. Please indicate below which Focus Group with which you would be involved.

High School Teacher _____
 Administrator _____
 Division Personnel _____

If you have any concerns, questions, or need additional information may contact Shannon Leppy (Principal Investigator) at _____ or the Human Ethics Secretariat at (204) 474-7122 or Margaret Bowman at: _____ a. You have received two copies of this consent form. Please sign one and have it witnessed if you wish to participate and keep the other for your records and reference.

 Signature of Witness Signature Date

.....
 The findings of this study will be available once the study has been completed. Would you like a summary of the results mailed to you:
 (PLEASE CIRCLE YOUR RESPONSE) **YES** **NO**

If yes, please include your mailing address:

LETTER OF CONFIDENTIALITY

STUDY: CONCEPTUALIZING THE ROLE OF 'CRITICAL FRIEND' WITHIN THE
CONTEXT OF SCHOOL IMPROVEMENT.

PLEDGE OF CONFIDENTIALITY: RESEARCH PARTICIPANTS, RESEARCH
ASSISTANT AND DATA TRANSCRIBER

This form is intended to further ensure confidentiality of data obtained during the research study entitled "**Conceptualizing the role of 'critical friend' within the context of school improvement.**" All focus group participants, the research assistant who is facilitating the focus groups and the transcriber involved in this research study will be asked to read the following statement and sign their names indicating they agree to honor this pledge of confidentiality.

I hereby promise to keep confidential any information that I may become privy to during this study. I agree to discuss material directly related to this study only with other members of the focus group within which I participated or the principal investigator (Shannon Leppky).

NAME: _____

SIGNATURE: _____

PRINCIPAL INVESTIGATOR'S SIGNATURE:

DATE: _____

APPENDIX E – PRE-FOCUS GROUP QUESTIONNAIRE AND MODERATOR
GUIDES

Pre Focus Group Questionnaire – Voluntary and Anonymous
The Role of ‘Critical Friend’

What “spaces” does the ‘critical friend’ operate in?

This questionnaire is voluntary and anonymous. If you would like to respond to the following questions, please do so and place the questionnaire in the box marked “Questionnaires”. The intent is for this exercise to be completed prior to the start of the Focus Group.

The purpose of asking the following questions is to find out what types of conversations you believe are most beneficial and important in the ‘critical friend’ process. You will have an opportunity to expand on these questions in the Focus Group when you will be invited to talk about the purpose of the ‘critical friend’ conversation.

1. To what extent do you believe the ‘critical friend’ process should support school teams in their school planning processes?

1	2	3	4	5
Little focus		Some focus		Big focus

2. To what extent do you believe the ‘critical friend’ process should encourage and facilitate inquiry and reflection?

1	2	3	4	5
Little focus		Some focus		Big focus

3. To what extent do you believe the ‘critical friend’ process should focus on discussing content as related to your school plan? i.e. assessment strategies, teaching strategies, philosophies of practice?

1	2	3	4	5
Little focus		Some focus		Big focus

4. To what extent do you believe trust is an important factor in the ‘critical friend’ process?

1	2	3	4	5
Very Little		Somewhat		A lot

5. Additional Comments.

Moderator Guide – Teacher and Administrator Focus Groups

Procedures

- Introduction of the facilitator and observer (principal investigator).
- Purpose of the interview, what will happen with the results – see below.
- Ensure individuals that they will not be identified, the conversation will be audio-taped and that the principal researcher will take notes during the conversation.
- Individuals have the opportunity to respond to any or all questions. The choice to refrain from a question will not be seen as a negative behaviour.
- An effort will be made to hear from each participant equally.
- The transcripts, tapes, and Field Notes will be destroyed upon completion of the research.
- Participants will have the opportunity to provide the principal researcher with further comments after the Focus Group and until January 30th via phone.
- Participation is voluntary and they can withdraw at any time. As well, they may ask for the tape to be stopped so as not to record part of the conversation.
- Ask if they are willing to participate.
- Questions?

Introduction

Welcome and thank you for agreeing to participate in this important study! As you are aware, the school division is in the process of reviewing the role of ‘critical friend’. The data collected through this focus group as well as three other focus groups will be used to answer the questions, what are the important elements that begin to define the role of ‘critical friend’, and what are the contextual factors that need to be considered for the role of ‘critical friend’ to be effective. This data will be used within Shannon’s Master’s thesis. A summary of the findings will be made available to you, the senior administration in the school division and to the high school teams.

I have six main questions that I would like to ask you today. I would like to hear from everyone and will do my best to ensure that everyone who wants to respond to a question is able to do so. The focus group will be 1 to 1 ½ hours in length. I will pay attention to our time and will monitor our progress as the time proceeds. The conversation we have today will be audiotaped so that the conversation can be transcribed. A hired data transcriber will do the transcription.

Your participation in this focus group will be kept confidential. You will not be identified in any of the written materials. Any specific comments that are used in the report will be referenced according to the focus group within which it came. i.e. teacher, administrator, division personnel.

We will begin with introductions after which I will begin recording our conversation.

Are there any questions?

Questions:

1. You are talking with a colleague from another school division. You mention that your school is involved in 'critical friend' conversations two times a year. They ask you about that. How would you describe the role of 'critical friend' and the 'critical friend' process to them?
 - What is it that the 'critical friend' does?
 - What is it that you talk about with 'critical friends'?
2. What would you describe as the purpose of 'critical friend' conversations?
 - How would you describe a "good" or "helpful" critical friend conversation?
 - How would you describe a "bad" or "unhelpful" critical friend conversation?
3. What would you say are the most important characteristics or skills that people need to have to be a good 'critical friend'?
 - What makes someone an effective 'critical friend'?
 - What gets in the way of someone being an effective 'critical friend'?
4. What can we learn from the Critical Friends Team (CFT) structure as it has been facilitated in the past?
 - What were the strengths of the CFT process?
 - What were the limitations of the CFT process?
5. If the division were to continue the use of the role of 'critical friend', it will be important to consider what factors need to be in place to increase the likelihood that this role will be effective. What factors would you say need to be considered when thinking about a new model within which the role of 'critical friend' is facilitated?
6. Fast forward into the future. It is now five years later and the division has been engaged in a revised 'critical friend' model. What does that look like?

At the end of the conversation, thank the group for their participation and ensure them again that their participation will remain anonymous. The principal researcher then extends an invitation for individuals to contact her via phone if they have any further comments they would like to add. They can do so until January 30, 2007.

Moderator Guide – Division Personnel Focus Group

Procedures

- Introduction of the facilitator and observer (principal investigator).
- Purpose of the interview, what will happen with the results – see below.
- Ensure individuals that they will not be identified, the conversation will be audio-taped and that the principal researcher will take notes during the conversation.
- Individuals have the opportunity to respond to any or all questions. The choice to refrain from a question will not be seen as a negative behaviour.
- An effort will be made to hear from each participant equally.
- The transcripts, tapes and Field Notes will be destroyed upon completion of the research.
- Participants will have the opportunity to provide the principal researcher with further comments after the Focus Group and until January 30th via phone.
- Participation is voluntary and they can withdraw at any time. As well, they may ask for the tape to be stopped so as not to record part of the conversation.
- Ask if they are willing to participate.
- Questions?

Introduction

Welcome and thank you for agreeing to participate in this important study! As you are aware, the school division is in the process of reviewing the role of ‘critical friend’. The data collected through this focus group as well as three other focus groups will be used to answer the questions, what are the important elements that begin to define the role of ‘critical friend’, and what are the contextual factors that need to be considered for the role of ‘critical friend’ to be effective. This data will be used within Shannon’s Master’s thesis. A summary of the findings will be made available to you, the senior administration in the school division and to the high school teams.

I have six main questions that I would like to ask you today. I would like to hear from everyone and will do my best to ensure that everyone who wants to respond to a question is able to do so. The focus group will be 1 to 1 ½ hours in length. I will pay attention to our time and will monitor our progress as the hour proceeds. The conversation we have today will be audiotaped so that the conversation can be transcribed. A hired data transcriber will do the transcription.

Your participation in this focus group will be kept confidential. You will not be identified in any of the written materials. Any specific comments that are used in the report will be referenced according to the focus group within which it came. i.e. teacher, administrator, division personnel.

The tape and the transcripts will be destroyed after the transcription and coding have been completed.

We will begin with introductions after which I will begin recording our conversation.

Are there any questions?

Questions:

1. You are talking with a colleague from another school division. You mention that you have been involved with schools as a 'critical friend'. They ask you about that. How would you describe the role of 'critical friend' and the 'critical friend' process to them?
 - What is it that the 'critical friend' does?
 - What is it that 'critical friends' talk about with school teams?
2. What would you describe as the purpose of 'critical friend' conversations?
 - How would you describe a "good" or "helpful" critical friend conversation?
 - How would you describe a "bad" or "unhelpful" critical friend conversation?
3. What would you say are the most important characteristics or skills that people need to have to be a good 'critical friend'?
 - What makes someone an effective 'critical friend'?
 - What gets in the way of someone being an effective 'critical friend'?
4. What can we learn from the Critical Friends Team (CFT) structure as it has been facilitated in the past?
 - What were the strengths of the CFT process?
 - What were the limitations of the CFT process?
5. If the division were to continue the use of the role of 'critical friend', it will be important to consider what factors need to be in place to increase the likelihood that this role will be effective. What factors would you say need to be considered when thinking about a new model within which the role of 'critical friend' is facilitated?
6. Fast forward into the future. It is now five years later and the division has been engaged in a revised 'critical friend' model. What does that look like?

At the end of the conversation, thank the group for their participation and ensure them again that their participation will remain anonymous. The principal researcher then extends an invitation for individuals to contact her via phone if they have any further comments they would like to add. They can do so until January 30, 2007.