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Exploring Critical Friendship through Leadership for Learning

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Abstract

Critical friendship is an element common to many Leadership for Learning projects and activities, and is increasingly the focus of attention in a variety of contexts. This paper explores the notion of critical friendship, seeking to conceptualise and theorise a role and a relationship which appear to be neither clearly nor commonly understood by academics, policy makers and practitioners. Examples of critical friendship in a variety of contexts including school improvement, research and development projects, school self-evaluation and networks are drawn upon. Within the paper issues relating to critical friends, such as their relationship with other stakeholders and the role of an outsider are examined.

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Exploring Critical Friendship through Leadership for Learning¹

Introduction

Leadership for Learning: the Cambridge Network (LfL) is a group of practitioners and academics experienced and interested in learning, leadership and their interrelationship (www.educ.cam.ac.uk/lfl). Operating from the University of Cambridge Faculty of Education, many of its activities involve external support for school based research and development. Fullan (2001) regards the involvement of outsiders as crucial to school improvement. External support is manifested in many forms, one of which is critical friendship - a term applied in a variety of contexts, although not used consistently nor apparently commonly understood.

This paper is in two parts: firstly the concept of critical friendship, including the contexts in which it is employed, are considered. Then a range of LfL activities are used to illustrate issues about critical friendship raised in the first part.

PART 1

In this section the origin, use and definition of the term 'critical friend' are explored, along with consideration of the role, critical friendship relationships, the individuals involved, and the contexts. All these aspects interrelate, but for clarity each is considered separately.

Nascence and use

The phrase 'critical friend' has been in use since the late 1970s, and its coinage is attributed to Desmond Nuttall, within the context of school self appraisal (Heller 1998). Since then it has been applied to:

- LEA support for schools (Winkley 1985; Mortimore 1995)
- action research (McNiff et al. 1996; Holden 1997; Hill 2002)
- school governance (DfE/OFSTED/BIS 1995; Cuckle et al. 1998)
- study support (QiSS 2003)
- self support study groups for higher degrees (Bennett et al. 1997)
- school self-evaluation (MacBeath et al. 2000)
- school improvement (MacBeath and Mortimore 2001)
- research and development projects (James et al. 2003)
- networked learning communities (NCSL 2002)
- headteacher training programmes (NCSL 2003)

¹ This paper is substantially the same as the paper 'Critical Friendship and Leadership for Learning' presented at the annual conference of the British Educational Research Association in Edinburgh on 13 September 2003.

Definition

Given the term is used in a variety of contexts, what is meant by a 'critical friend'? Costa and Kallick (1993) have described a critical friend as:

... a trusted person who asks provocative questions, provides data to be examined through another lens, and offers critiques of a person's work as a friend. A critical friend takes the time to fully understand the context of the work presented and the outcomes that the person or group is working toward. The friend is an advocate for the success of that work. (p50)

This description is quoted frequently by other writers (for example Stoll and Fink (1996); MacBeath et al. (2000); Doherty et al. (2001)). Other descriptions by Stoll and Thomson (1996), McDonald (1989) and Brighouse and Woods (1999), emphasise the critical friend helping schools make sound decisions, challenging expectations, patiently playing a role that is interpretive and catalytic, helping shape outcomes but never determining them, alerting the school to issues often only half perceived, and being sympathetic to the school's purpose.

Exploring the role

Metaphors used by writers to describe the work of the critical friend help illuminate the role. Many of them are about seeing things from different viewpoints and in different ways, reflecting an important angle of a critical friend's work. McDonald (1989) comments that one of the common characteristics of the seven methods that he describes for bringing about change in schools is that they all depend on the different perspective that outsiders can provide (p211). Dean (1992) talks of 'a fresh pair of eyes' (p25), as do Ainscow and Southworth (1996). The role of the critical friend in helping school colleagues to 'reframe' (Bolman and Deal 1991) also has visual connotations. West (2000) uses two visually related words in his subtitle 'Observations on the inside, reflections on the outside'. This also brings in the *double entendre* of 'reflective' as someone who mirrors back to others so that they can see more clearly, as well as thinking about things herself (Schon 1983; Ross and Reagan 1990).

Some writers use auditory metaphors. For example, Winkley's (1985) 'listening ear' (p54) is echoed by MacBeath and Myers' (1999) 'tuning in' (p98) and Flintham's (2003) 'sounding board' (p19).

Taken together these various descriptions begin to sketch the form of critical friendship. A picture emerges of a critical friend as an outsider who not only has a different perspective on the school from those within it, but also assists them to see the familiar in a new light. The overall aim of a critical friendship is to support improvement through empowerment, by demonstrating a positive regard for people, and providing an informed critique of processes and practices. The critical friend's viewpoint has credibility if it is informed by an understanding of the specific situation and of the general context. In order to carry out the role effectively the critical friend needs particular skills and understanding.

Greater clarity about the role of a critical friend can be achieved by comparing and contrasting it with other similar roles. Advisers, inspectors, counsellors, mentors, coaches and consultants all share some characteristics with critical friends supporting school improvement. However, each is idiosyncratic, and offers specific points for comparison and contrast.

Advisers, inspectors and school improvement officers who work under the auspices of a local education authority (LEA) bring to their work with school colleagues a specific external agenda, and carry responsibilities for monitoring and reporting as well as supporting and challenging (Cambridgeshire County Council 2001). LEA officials have degrees of formal power by virtue of their position (Heller 1998). Ofsted inspectors are in a similar position. Imposed agendas, accountability to others for reporting and specific targets, and power differentials are all at odds with the essence of critical friendship. Counsellors use many of the same skills and share some of the same qualities as critical friends, but their interest focuses upon an individual, his or her feelings and personal issues. A critical friend is concerned with organisational matters, and with outcomes, effects and implications for many different people, as well as the personal well-being of individuals. Like counsellors, coaches and mentors also are concerned with the performance of specific people. Coaches and mentors have generally had experience in the same role as the person they are working with, which is not necessarily the case with critical friends. Coaches tend to be very directive in their approach, whereas critical friends are more facilitative. According to Clutterbuck (1991), mentors see the people they work with as protégés, and the relationship is similar to that of a master and apprentice. Using a transactional analysis model (Hewson and Turner 1992) this implies a 'parent-child' relationship, whereas critical friends should foster 'adult-adult' relationships.

Consultants are probably closest to critical friends in their role and functioning, and indeed some use these two terms interchangeably. Others, for example some LfL Associates, have a particular dislike of the term 'consultant', much preferring the term 'critical friend'. The widespread use of the word 'consultant' across professions, business, industry, services and commerce means that any individual's experience of consultants is likely to be varied, and results in the term carrying both positive and negative connotations. In comparison with consultants, critical friends are more process than task orientated; transformative rather than transactional; tend to be engaged for a longer period of time; operate within a clear set of values; and work with people who are open to fundamental change rather than simply seeking the solution to a specific problem. These distinctions are generalisations, and many specific examples could be found of consultants operating congruently with critical friends as conceived in this paper. As consultants and critical friends are portrayed here, all critical friends could be termed consultants, but not necessarily the other way around.

The similarities between critical friends and consultants are helpful, not least because there are few if any models of critical friendship in the literature, but there are a number

However, practitioners and writers have observed that the essence of critical friendship is not simply a balancing of the roles of critic and friend through emphasising *either* pressure or support, but rather a richness resulting from providing *both*. A critical friend summarised the role as 'professional challenge *and* personal support' (Swaffield 2002, p65), while MacBeath and Jardine (1998) talk of 'a successful marrying of unconditional support and unconditional critique' (p41). This conceptualisation suggests a two dimensional diagrammatic representation, mirroring Hampden-Turner's (2002) work on paradoxes. In this model, an increase in one element does not necessarily mean a decrease in the other. Paradoxically, as 'friendship' increases, involving the establishment and deepening of trust, so it becomes possible to increase 'criticism'.

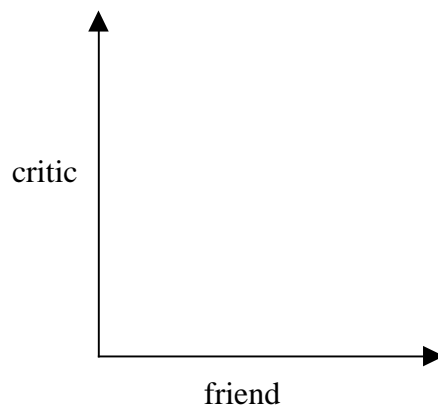


Figure 2: Critical friendship in two dimensions

This suggests that critical friendship is a dynamic relationship, with the particular combination of critique and friendship, or challenge and support, altering over time. Typically, the relationship is initially characterised by an emphasis on friendship or support, with critique or pressure becoming more evident later. As the relationship continues, the critical friend will be judging and employing the appropriate combination of the two elements, depending upon the ever changing circumstances of the situation.

So by adding a third dimension of time (Figure 3), the complexities of critical friendship are revealed further, and a model for conceptualising critical friendship developed.

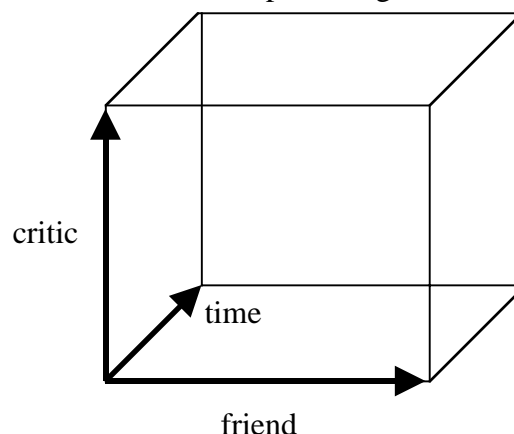


Figure 3: Critical friendship in three dimensions

The relationship

Much of the literature on critical friendship focuses upon the critical friend in relative isolation, concentrating upon skills and qualities of the critical friend (for example, Winkley 1985; Miles et al. 1988; Ainscow and Southworth 1996). However, in conceptualising critical friendship, the fact that it is a relationship with at least one other person seems crucial.

There is no satisfactory term for this other person. 'Client' is most frequently used, particularly in the context of consultancy, but its emphasis on the transactional is rather unsatisfactory. 'Befriended' implies dependency and passivity on the part of one partner, which is not the case with critical friendship. In the absence of a better term, 'school colleague' is used here, since this paper considers professional relationships within the context of schools.

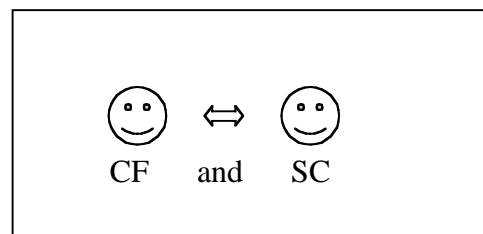


Figure 4: The Critical Friend and School Colleague interrelate

Identifying the school colleague(s) in a critical friend relationship is not a straight forward matter, since there will probably be a number of people with whom the critical friend relates quite closely. There will also be other people involved in and affected by the process: in recognition of this issue Schein (1997) provides a categorisation of six basic types of client. The success of any critical friend relationship will partly depend upon a shared understanding by all parties of boundaries and the specific roles of the various players and stake holders.

Some models of consultancy focus upon the nature of the transactions between (at its simplest) the two people in the relationship. Schein (1987) suggests three models: the vendor-purchaser; the doctor-patient; and the process consultant-client. Morris (1988) identifies three types of consultancy: directive, behavioural and catalytic. Harland (1990) characterises four forms as 'give, tell, show, ask', while Eraut (1978) suggested a typology of 11 roles that a consultant could adopt. Drawing upon these models, critical friendship relationships most closely resemble the process consultant/helper, catalytic, zetetic forms.

The temporal aspect of critical friendship is recognised by figure 3 above, and has been identified in many studies. For example, Fuller and Fisher (2000) distinguish between the four stages of preparation, entry, action and exit. At each of these stages the

relationship between the critical friend and school colleagues will be subtly and significantly different.

Individuals

Whatever the particular form of the relationship, it will also be affected by the personalities and characteristics of the individuals involved. The effect of gender upon mentoring relationships has been briefly considered by Clutterbuck (1991), and Sapadin (1988) studied the influence of gender on professional friendships. However the part played by gender, ethnicity and relative ages upon critical friendship type relationships has been little researched. It is beyond the scope of this paper to consider the influence of these attributes, beyond noting that interpersonal relationships must be affected by the particular traits and qualities of the individuals involved. Nevertheless, it should be recognised that the success or otherwise of any critical friendship is dependent to a considerable degree on the attitudes and behaviours of the school colleagues, as well as the critical friend.

Context

Relationships do not occur in a vacuum: they always takes place in specific yet dynamic contexts. For example, a critical friendship for school improvement will have a particular focus (such as extending the practice of distributed leadership), located within specific schools each of which has a unique combination of history, culture, resources, and pupil and staff profiles. Schools function within local communities and are influenced by their administrative, accountability and funding structures, as well as needing to take account of national priorities, pressures and opportunities.

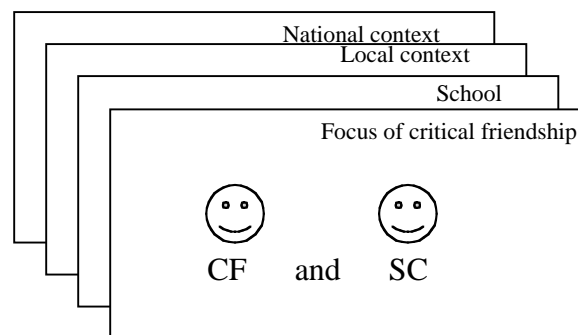


Figure 4: The Critical Friend and School Colleague in context

All these factors mean that no school is like any other, and critical friend relationships need to adapt to each situation. There can therefore be no single formula for the work of critical friends, as acknowledged by Healey and De Stefano, whom Fullan (2001) cites as saying 'what works in one location won't necessarily work in another' (p191).

The centrality of relationships, and the two-way interaction between individuals and their constantly changing contexts, are fundamental tenets of complexity theory. 'None of us

can exist independent of our relationships with each other. an organism interacts dynamically with its environment, influencing and, in turn, being influenced by its environment....' (Morrison 2002, p5).

Connections between role, relationships, individuals and context

Complexity theory stresses the fact that in any complex interactive system, constituents interact. The four elements discussed above - the critical friend role, the relationship between the critical friend and school colleagues, the characteristics of the individuals involved, and the nested contexts in which the critical friendship exists - all interrelate. Each element is to some degree flexible, and to varying extents each affects, and is affected by, each of the other elements. This can be represented diagrammatically by a tetrahedron, as in figure 5.

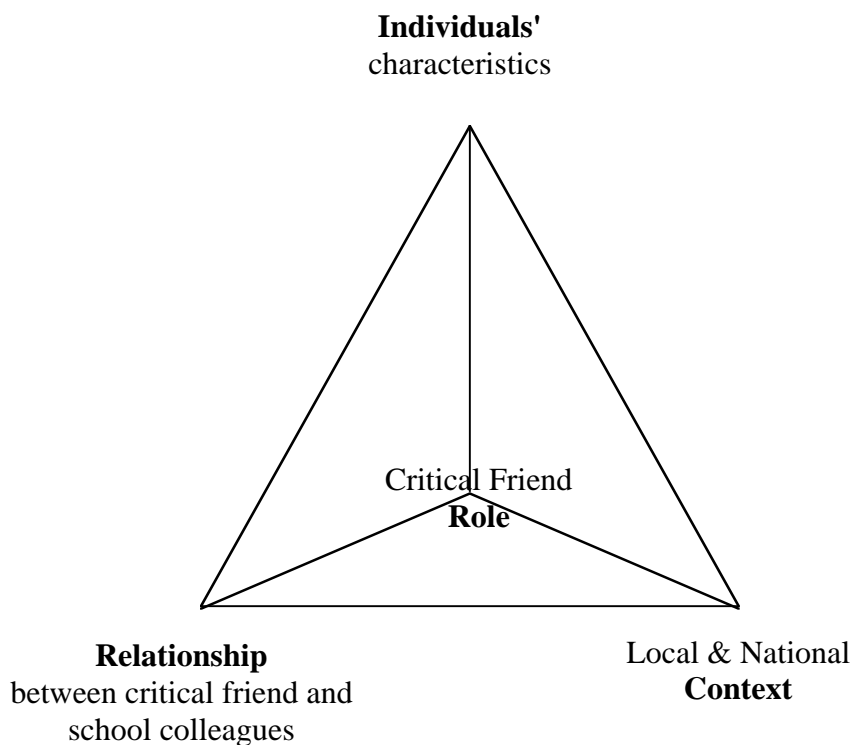


Figure 5: Elements are interconnected

All these elements, and the connections between them, can be identified in Shaw's account and discussion of undertaking consultancy to an organisation whilst viewing it as a complex adaptive system (Shaw 1997).

PART 2

Within Leadership for Learning: the Cambridge Network critical friendship is used to support school improvement and research in a number of projects and activities. They provide opportunities to explore facets of critical friendship. The following six vignettes illustrate LfL work, and each contributes to a developing understanding of critical friendship.

1. Hertfordshire Learning Partnership

The Hertfordshire Learning Partnership comprised a group of secondary schools, Hertfordshire Local Education Authority and the University of Cambridge working collaboratively on school improvement issues. Under the umbrella of the project the University provided support for a number of initiatives, including the provision of critical friends through LfL to work with schools on specific issues that they had identified. Typically, this involved the LfL Associate as critical friend meeting with the headteacher and the LEA coordinator for the partnership, discussing and agreeing the focus and the particular contribution of the critical friend. Critical friends were then often involved in collecting and interpreting data on the issue in hand, feeding back, and working together on the appropriate next steps (Frost 2002).

LfL Associates were thus exemplifying Costa and Kallick's (1993) description of critical friends by asking provocative questions, providing data, and offering critiques. They made efforts to understand the particular situation, to get to know the school colleagues with whom they were working, and were committed to the success of the ventures. All the critical friends had track records of successful experience in this kind of work. However, the context within which these critical friendships took place created some tensions, all of which hinged upon the initial part of Costa and Kallick's definition - trust. By virtue of being in the partnership each school was one of a local group, often serving the same or adjacent communities, and with both positive and negative experiences of working together. Although each critical friend was attached to one school, the intention of the partnership was that there should be communication between schools so that experience, understandings and practice could be shared for the benefit of the pupils and staff in all the schools. However, a lack of trust on the schools' part sometimes resulted in them often being less than open with the critical friend, and being wary of information going beyond the school. There were also similar tensions and lack of trust with the third player in the partnership - the LEA. Given the multiplicity of the LEA's roles in relation to each school, schools also displayed some caution in making data available to the critical friend if they felt uneasy about how it would be reported to and used by the LEA.

2. Carpe Vitam

'Leadership for Learning: The Carpe Vitam Project' (LfL:CV) is an international project involving 24 schools in eight countries and states, and focuses upon the role of school leadership in creating a stimulating learning environment for all associated with the school (MacBeath et al. 2003). Each school in the project has a critical friend, whose

role is to assist the school in reviewing current strategies for learning-centred leadership, and to support the school in the development of more effective ways of thinking about and realising their goals. The critical friends have a variety of backgrounds and include university academics, freelance consultants, and school governors. The project is supported and researched by university colleagues in each locality. Across the whole project there are a number of different configurations of critical friends and researchers. For example, in some countries the critical friends and researchers are two distinct groups; in others, university colleagues are both critical friends and researchers, adopting different roles in different schools.

These arrangements exemplify some of the complexities of identifying 'types of client' (Schein 1997). Schein distinguishes six types of client, yet his typography is still not sufficiently detailed to differentiate between the various relationships in the project. He uses the term 'primary clients' for those who ultimately 'own' the problem or issue being worked upon, so applying this model to LfL: CV it is the school colleagues who are the primary clients. However, Schein also applies the term primary clients to those whose budget covers the consulting costs - which for Carpe Vitam are the universities and the Wallenberg Foundation which funds the project. To further complicate the matter, the university personnel are also the 'contact clients' since in each country they contact and commission the critical friends. Even within a school critical friends relate to a number of individuals and groups, depending upon the particular focus of the work. Along with primary clients and contact clients, Schein's classification also includes intermediate clients (other people who become involved in the work); unwitting clients (people who are unaware that they will be affected by the work); indirect clients (people who know they will be affected but are unknown to the critical friend); and ultimate clients (everyone whose welfare must be considered by the critical friend). These different client groups, and the varied relationships they imply, often raise challenging issues of ethics and confidentiality and mean that critical friends must operate with 'exquisite sensitivity' (Sarason 1986, p119).

The larger purpose of the Carpe Vitam project (beyond the developments in each individual school) is to research leadership for learning across a number of settings internationally, so the critical friends must have a close relationship with the researchers (who could be considered another type of client). However, the schools are the settings for the development work that the critical friends are assisting. This work may appear more immediate and tangible to critical friends not directly involved with the research across the whole project, and so their relationships with school colleagues may overshadow those with researchers. Critical friends need to understand and relate appropriately to a number of stakeholders in these multiple relationships if the maximum benefits from the project - for the individual schools, and for our knowledge and understanding about learner-centred leadership - are to be achieved.

3. International headteacher critical friendship exchange

Through a LfL Associate and the New Zealand Ministry of Education, six English headteachers and six New Zealand principals acted as critical friends for each other,

enquiring into a significant issue of leadership and/or learning in each school. Each exchange started with two days training for the visiting headteachers/principals (acting as critical friends) and their host headteachers/principals. The training, led by the LfL Associate, included learning about the education system and current educational issues in the host country; developing a shared understanding about the process of enquiry; clarifying the focus, rationale and purpose for each enquiry; agreeing ground rules for data collection; and discussing the presentation of the report. By working together, socialising, and staying with each other in their homes, the critical friend and host had quality time to get to know each other and to establish trust. The enquiries were then carried out as had been agreed, and once the reports had been given, the process was concluded with a review. This consolidated the learning, highlighted the benefits of the process, and involved all the headteachers and principals (Swaffield 2003a).

In this example, involving critical friends from opposite sides of the world, the critical friendship activity took place over two separate intensive weeks. So the time scale is shorter than generally associated with critical friendship activities. However, it could be argued that 'quality time' as encapsulated in the Greek word 'kairos' and in this case manifested by training, working and socialising together, compensated for the lack of chronological time ('chronos') (Covey, Merrill et al. 1994). The English headteachers and New Zealand principals acted as critical friends for each other, demonstrating that critical friendship can be between peers and mutual. However, at any one time there is a clear demarcation of roles, with one being the critical friend and the other being the focus for the activity. Reports from the headteachers and the principals emphasise that they all found both aspects of the relationship a learning experience, not only about the particular focus of the enquiry, but also about how to support others through critical friendship, and the conditions and factors which promote positive critical friend relationships.

4. Networks

Networks take many forms, and currently the National Centre for School Leadership (NCSL) is promoting Networked Learning Communities (NLCs). These are seen as a way of teachers in groups of schools working collaboratively to create and share knowledge, to learn from each other's experiences, and to find solutions to common problems (NCSL, 2002). In their application to become a NLC each group of schools is required to nominate a critical friend, whose role is both to support and critique the group's work, and also to facilitate networking with other groups. LfL provides the critical friends for two NLCs - the Cambridgeshire Outreach Network for Education, and the Haverhill Networked Learning Community.

NLCs approach someone whom they would like to be their critical friend. In some other situations critical friends are imposed, but Fidler et al. (1996) stress the importance of being able to choose with whom you work. One of the considerations in inviting a particular person to be a critical friend must be their personality and the extent to which it is thought that good interpersonal relationships will be established. Through the very nature of networking, the critical friends involved with NLCs have many people whom they could regard as their school colleagues. It is likely that direct contact will be

between the critical friend, the network leader and the managing group, and so perceptions of the way particular individuals will work together will probably be considered alongside other factors such as relevant expertise.

5. School self evaluation

It was in relation to school self-evaluation that some of the first references to 'critical friends' can be found (Heller 1998). School self-evaluation has remained the context in which considerable developments in understanding critical friendship have been made (for example MacBeath et al. (2000)), and it is now an integral part of the new Ofsted framework for the inspection of schools (OFSTED 2003). LfL runs international programmes for principals from the Netherlands and Hong Kong, in which a central element is the contribution of critical friends to the process of school self-evaluation. School self-evaluation is an integral and central process within the LfL Carpe Vitam project described in example 2, above. As part of the many processes and forms of data gathering that contribute to the project, each school produces a portrait, comprising both qualitative and quantitative data, and including the perspectives of as many different people as possible.

It is perhaps another paradox that an external critical friend can be so valuable in the internal process of school self-evaluation. An outsider with a different perspective, who sees things through a different lens, acts as a mirror and a sounding board, and asks provocative questions, contributes essential elements to school self-evaluation. Developing self-knowledge is a complex and sensitive process, which a critical friend can assist in many different ways. For example, he or she may:

- Help create the climate for self-evaluation
- Critique plans for self-evaluation
- Ensure that the purposes are clear
- Challenge the school to ask itself testing and revealing questions
- Facilitate the process
- Advise on particular data gathering approaches
- Collect data
- Feed back data
- Assist with the analysis and interpretation of data.
- Bring knowledge and experience of other schools' approaches to self-evaluation
- Ask the provocative questions which challenge, clarify and deepen understanding
- Act as a sounding board for testing out emerging ideas and insights
- Provide useful readings to stimulate and extend thought
- Suggest possible courses of action in response to the findings of self-evaluation
- Motivate and provide reassurance
- Network

(Swaffield 2003b).

This multiplicity of possible roles requires well developed interpersonal, communicative, and technical skills, as well as relevant knowledge and experience, and is only possible with the bedrock of critical friendship, trust.

6. Training in Critical Friendship

LfL in association with Capita Education Services has developed a training programme for critical friends supporting schools, in the specific context of using a school self evaluation profile. The training programme requires participants to be explicit about the values that inform their work as critical friends. It addresses many of the issues central to critical friendship (for example role, trust, and the relationships with different stake holders) that have been discussed above and illustrated through the previous examples. Participants are also asked to consider the skills and attributes of a critical friend, to reflect upon their own proficiency and strengths, to practise conducting a conversation as a critical friend and to receive and give feedback.

The development of this training programme for critical friends recognises that critical friendship is a particular approach to supporting school improvement; that it is similar to but distinctive from other roles; that it is underpinned by explicit principles and a clear ethical stance; that critical friends use a variety of skills in which, however proficient, they can always improve still further; and that critical friends should be reflective about their own practice.

Conclusion

Critical friendship is a distinctive and potentially very powerful form of external assistance for schools. It is flexible, and applicable in a variety of situations. Critical friendship as conceived in this paper resonates with the values, principles and purposes of Leadership for Learning. LfL provides the context in which many of the issues relating to critical friendship can be explored and better understood.

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