School self-evaluation and the role of a critical friend

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School self-evaluation is receiving increasing attention in England, partly as a result of changes in the Ofsted inspection framework giving greater prominence to what schools can do to speak for themselves. The relationship between internal self-evaluation and external inspection was a theme in a high profile policy speech made by the Schools Standards Minister, David Miliband, at the *North of England Conference* in January 2004. As part of a 'new relationship with schools' heralded in the speech, Miliband articulated critical friendship in terms of a 'school improvement partner'. This article draws upon a number of research projects to critique these proposals, especially in respect of the role of a critical friend in school self-evaluation. Issues discussed include different models of self and external evaluation, the importance of context, and the various ways in which a critical friend can support school self-evaluation.

School self-evaluation and the role of a critical friend

School self-evaluation is, by definition, something that schools do to themselves, by themselves and for themselves. Despite its high policy priority in many countries of the world it has not made redundant an inspectorate or other agencies with a quality assurance brief. The generic term increasingly used to describe these external agents is the 'critical friend', confusingly applied to inspectors, advisers, other heads, business or university consultants, parents or school governors who work with schools on an improvement agenda. All of these in different ways may lay common claim to helping schools see themselves from different perspectives; all may contribute to broadening and deepening a school's self-knowledge.

The role of critical friends in school self-evaluation is an issue with wide applicability in a number of countries, but it has recently assumed a higher policy profile in England with the promise of a new relationship between schools and the inspectorate. The developing understanding of the relationship between critical friends and school self-evaluation provides the focus for this paper. We draw on a

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number of projects[1] which have employed, or are currently employing, critical friends. Some of these have a clear focus on self-evaluation, while others do not have that explicit focus but are, nonetheless, working in a school self-evaluation context.

Schools need friends

Schools are more likely to improve when they enjoy external support. That is the conclusion of Baker and associates (1991), who compared schools which drew on external support and those that didn't. Such a finding is not without its problems given the width of definition of what might constitute 'support' and the source from which it came. Defining 'support' objectively to include all forms of external intervention may be to miss the point, given that support is in the eye of the beholder, a subjective phenomenon dependent on a range of factors, not least the nature, provenance and purpose of the critical friend.

   Each of these different putative critical friends comes with a different 'passport', differing legitimacy and authority, and from a differing power base. They may be appointed by an external agency, such as the Local Education Authority, or chosen by the school itself, and within the school elected by a range of different people. Whether invited, proposed or imposed, critical friends come with a remit, a focus, or in some cases only a set of under elaborated assumptions about what they are there to do and where the boundaries of their intervention lie.

   These questions of a critical friend's purpose, focus and boundaries all assume particular significance in a self-evaluation context and need to be understood in relation to the model of self-evaluation in use and how tightly that model is circumscribed by local or governmental agencies. Alvik (1996) identifies three predominant models of self-evaluation and external evaluation in use in different administrations:

- *Parallel:* in which the two systems run side by side each with their own criteria and protocols.
- *Sequential:* in which external bodies follow on from a school's own evaluation and use that as the focus of their quality assurance system.
- *Cooperative:* in which external agencies cooperate with schools to develop a common approach to evaluation.

Each of these three models reflects the policy context in which they are embedded. These models are difficult to pin down given that policy thinking around external and internal evaluation is in a state of continuing flux and transition. Few, if any, administrations have resolved the relationship between what schools should do autonomously and what support or intervention should come from without. Few, if any, have resolved the tension between inspection and self-evaluation. Due to the impact of globalization and the international comparative performance tables, in all OECD countries at least, this external/internal evaluative relationship remains an unfinished story.

England is a case in point. During the 1990s self-evaluation schemes were developed by local authorities, often by schools themselves and sometimes under the aegis of professional bodies. Through the late 1990s, for example, many schools adopted the framework advocated by the National Union of Teachers (MacBeath, 1999). The framework was created by drawing together indicators of a good school generated by different groups (teachers, management, support staff, pupils, parents and governors). It was suggested that schools could go through a similar process themselves, could use the framework as a starting point, or sift and prioritize existing Ofsted criteria. This, in common with a number of other models thrived, or struggled, within an inspection regime that took little interest in self-evaluation. Up until the election of the Labour Government in 1997 the two approaches to school evaluation, internal and external, ran in parallel and often in conspicuous tension.

While this parallel existence continued for some time into the New Labour Government there was from even before the election a political commitment to promote school self-evaluation at governmental level (MacBeath, 1999). The revised framework for the inspection of schools in England (Ofsted, 1999) included guidance on using the handbook for self-evaluation, with the strong encouragement to use the Ofsted framework to check both the scope and judgements of self-evaluation. The pre-inspection Form S4 that schools were required to complete was presented as a way of recording ongoing self-evaluation. Schools were told that inspections enabled the testing of the school's perceptions 'against those of impartial, external evaluators' (Ofsted, 1999, p. 143) and that 'using inspection to test the school's perception of itself gives an insight into how well it is managed' (Ofsted, 1999, p. 110). Seven years into a Labour government and with a new Chief Inspector this concerted policy shift from a parallel to a sequential model has continued, and self-evaluation has moved to centre stage. The framework for inspecting schools that came into operation in September 2003 strengthens inspectors' use of the school's self-evaluation to help focus their own inspection, and functions as an indicator of the quality of the school's leadership. Proposals for future changes to the inspection system moves school self-evaluation from a complementary process that is encouraged to an integral pre-requisite, where 'self-evaluation evidence (is) at the heart of the inspection' (DfES, 2004a, p. 6) and 'the (self-evaluation) form is the most crucial piece of evidence available to the inspection team' (DfES, 2004a, p. 24).

This move to a new relationship was first spelled out by the Government Minister, David Miliband, in a high profile policy speech on 8 January 2004.

> There are three key aspects to a new relationship with schools. An accountability framework, which puts a premium on ensuring effective and ongoing self-evaluation in every school combined with more focused external inspection, linked closely to the improvement cycle of the school. A simplified school improvement process, where every school uses robust self-evaluation to drive improvement, informed by a single annual conversation with a school improvement partner to debate and advise on targets, priorities and support. And improved information and data management between schools, government bodies and parents with information 'collected once, used many times'. (DfES, 2004b)

The Minister went on to identify three key elements, one clearly signaling a move to a more sequential model, the second hinting at a more cooperative model, the third appearing to promise a fully blown cooperative model. The sequential process is made clear in the following statement: 'A critical test of the strong school will be the quality of its self-evaluation and how it is used to raise standards' (Miliband, 2004). In other words, the focus of inspection will be on the school's own internal process. Inspection, it was suggested, would shift its interest from a direct first-hand examination of what teachers do in classrooms to a focus on the process or outcome of self-evaluation itself. The document from DfES and Ofsted published five months after Miliband's speech (DfES, 2004a) confirmed this intention. This approach has been advocated for a decade or so by a number of critics of the present regime as the preferred model for inspection, and was formally adopted as such by the European Consultative body of Inspectorates (SICI) in 2002.

However, the Miliband speech went further, hinting at a more cooperative model:

> The government and its partners at local and national level will increasingly use the information provided by a school's self-evaluation and development plan, alongside inspection, to inform decisions about targeting support and challenge. (Miliband, 2004)

The implication here is that there will be a degree of reciprocity between internal and external evaluation, the government listening to what schools have to say and, apparently, shaping policy in response. There is, on top of this, a third component which appears to foreshadow a more cooperative relationship. It promises that government will 'work with the profession to create a suite of materials that will help schools evaluate themselves honestly' (Miliband, 2004). Five months later we are told that it is:

> The professional associations … working with our encouragement to develop a range of tools, aids and training in self-evaluation which schools can pick and choose from … (DfES, 2004a)

These three key components of the external/internal relationship do, however, sit in uneasy juxtaposition. External inspection and honest disclosure by schools are unlikely bedfellows, no matter the political or cultural context in which they operate. This is especially acute in England where the Ofsted regime has left a legacy of distrust (Cullingford, 1999; Learmonth, 2000) and inspection remains a high stakes activity.

A closer critical testing of the three Alvik models does, nonetheless, serve to illustrate the transitional nature of policy development and raise major and complex issues for the work of the critical friend. In the evolving English context as outlined by Miliband the role of the critical friend is carefully demarcated.

> We will work with the LEA to provide a credible and experienced practitioner—a school improvement partner, in many cases someone with current or recent secondary headship experience—to act as a critical friend to the school and be authorized to approve—on behalf of the LEA and DfES—the performance targets set by the Head and Governing Body of the school. They would also be available to debate and advise on priorities and support needs, and assist with implementation support where necessary. (Miliband, 2004)

This Ministerial model offers one articulation of critical friendship and is structured around a set of propositions which circumscribe the role in ways difficult to reconcile with self-evaluation and school-driven improvement.

- He/she operates within a self-evaluation model framed explicitly in terms of accountability.
- Self-evaluation is integrally linked to school inspection.
- The school's own agenda is tightly circumscribed within a particular conception of 'improvement'.
- The critical friend is 'provided' for the school.
- He/she 'approves' performance targets on behalf of the LEA and DfES.
- The focus of the critical friend's work leaves little latitude for deviation or radical invention.

These depictions of school self-evaluation, critical friendship and their inter-relationship are highly problematic. They are contested by research evidence and conceptions of critical friendship as we have come to understand them through a range of projects which we have conducted, or been associated with, in the last few years. While not all of these projects had self-evaluation as their explicit focus, all were working within a context in which self-evaluation played an integral role in the action research. Running through these various projects were cross-cutting themes and some which were more specific to a school's local context or individual culture. All, however, afford helpful insights into the complexity of the critical friend role, its acute situational sensitivity, the micropolitical skills required to work in the policy spaces, and the importance of negotiating meaning in contexts where meaning is constantly being contested and refined.

Context matters

In an international project in which each school has its own critical friend, the importance of context becomes immediately apparent. Within different linguistic traditions the term itself translates sometimes uneasily. The *double entendre* in English does not always render itself to other languages and the ambiguity of the 'critical' often remains to engender confusion or raise anxiety. While in some countries the notion of critical friendship has a history, in others it comes as a new and unfamiliar concept and needs to be accompanied by an explication of what it pretends, and does not pretend, to be.

When it comes to planning for, or engaging in, critical friendship across countries, there is a heightened need for a honed awareness of context writ large in respect of national cultures and writ small in terms of cultures of individual institutions. Hofstede's (1980) work at both these levels offers a number of useful parameters for understanding schools and cultures both singly and in their inter-relationship. Hofstede suggests four primary parameters—*power distance*, *individual–collective*, *masculinity–femininity* and *uncertainty avoidance* each of which proves to be highly relevant to the work of the critical friend.

Understanding *power distance* is, for example, key to establishing a mutually respecting relationship. The assumptions one makes with a head teacher in Scandinavian countries if carried through to countries of the Pacific Rim might prove both counter productive and offensive. Comparing Japanese and American cultures, Evans *et al.* (2001) write that while an American boss is likely to admit his lack of knowledge on a given subject and ask a subordinate to go and find the answer for himself, the Japanese 'would never ask their boss a question directly unless they were sure in advance that the boss had the answer' (p. 365). In Thai culture students show their respect by not asking questions even when they do not understand (Hallinger & Kantamara, 2003). Awareness of such cultural politesse also bears upon *uncertainty avoidance* which is often germane to a critical friend's work. A critical friend may wish to encourage tolerance, and even embracing, of uncertainty (Claxton, 2000) but such a goal would have to be approached very differently in different cultural contexts. In similar vein *masculinity–femininity* take on quite different meanings in different cultural settings and need to be approached with acute sensitivity. The fourth Hofstede dimension, *individual–collective,* is of particular significance in eastern cultures where individualism is required to give way to collective interests, set around with tradition and protocol.

These issues were highlighted in an international project in which a group of student researchers conducted self-evaluation in six countries in the course of one school year. Their verbal reports and written accounts (Students of the Learning School, 2003) illustrate some of the culture shocks they experienced in moving, within the space of a few weeks, from a Swedish to a South African and then to a Japanese culture. These students, most of them of school age, were invited guests in the schools they visited, taken in as friends with the understanding that their feedback would pinpoint weaknesses and well as strengths. As they learned, however, this was a procedure to be conducted with extreme sensitivity and required, within the space of a few days, a rapid reorientation to the new cultural setting.

Broad cross-cultural generalizations are, however, always open to exceptions and remind us that within cultures as well as between them a range of differences are also obtained. Assuming too much about culture and school leadership as 'democratic' may prove to be as problematic in a Danish or English school as in a Hong Kong or Korean school. Subjectivity, ambiguity and uncertainty do not rest easily within a self-evaluation context in which objectivity is reified, data are treated as definitive and performance is measured on limited criteria. While experiencing strong top-down pressures, and by extension confining expectations of their critical friends, schools range widely on a compliance–deviance spectrum. Some, with self-confident leadership, strong critical friend support and their own 'robust' evaluation can work at cross grain with political mandate. As Elmore (2003) argues, it is when there is a strong sense of internal accountability that schools are most able to address external accountability. This is rendered considerably easier, however, with the safety net of high performance test scores. Self-evaluation and critical friendship are highly sensitive to context but, as we have learned, context is not simply some static place

saturated with a set of immutable beliefs and values. It expresses itself in subtle and dynamic ways. 'Context is not an outer shell inside which people behave in certain ways', writes Tolman (1999). It is not just 'out there', person plus context, but is itself an activity system in which the various players bring their own 'rules' and propositional goals.

In activity theory (Engeström, 1999) 'rules' refers broadly to sanctions and assumptions that constrain and facilitate interactions in a social system such as school. These 'rules' are often implicit rather than explicit and while guiding behaviour within organizational parameters are also transformed over time through the situations which people are 'in' but also recreate. Each situation has its own particular tools, symbols, organizational structures, language registers, division of labour and other artefacts that frame day-to-day practice. These 'inventions', as Spillane *et al.* (2004) describe them, tend to wear out over time and are redesigned or reinvented through the activities in which people engage.

An understanding of the context and situational dynamics of a school's activities is essential to the critical friend's approach to school self-evaluation which, in its most radical form, is able to probe and illuminate this multi-layered aspect of a school's life. Referring to a project involving academics, school research coordinators and critical friends Cordingley *et al.* (2002) describe the tensions among different sets of players that, in their interplay, define the context for their joint endeavours.

> Some of the rules such as those relating to academic freedom versus those relating to accountability for public funds or those relating to improving specific practice and demonstrating this versus those relating to research capable of generating generic lessons pulled in almost opposite directions. Some of these differences were quite fraught and inhibited communication. (p. 6)

Although physical space is in itself important, redolent with history and association, the situational meeting ground for critical friend and school staff is recreated through the relationship when people come together with a shared, or perhaps a disparate set of purposes. This is not to deny the power of physical and cultural space in which the meeting of minds takes place. Its formality or informality, the arrangement of the furniture, the props of tea or coffee are all conditional factors of a behaviour setting. They set a stage, define a place, which by its very structural features dictates to some extent what is and isn't legitimate within that space.

'We will always reach for a dispositional explanation for events as opposed to a contextual explanation' writes Gladwell (2000, p. 160), emphasizing the power of place and our inherent tendency to abstract people from their surroundings. Understanding place throws lights on dispositions and the forces at work to shape the expectations that both parties bring to the encounter. An industrialist may have to work hard to prove she has something to offer to schools. An inspector or adviser may have to convince that there is no hidden political agenda. A university researcher may be seen as having a covert purpose. A school governor may have to overcome micropolitical and accountability tensions that accompany perceptions of his or her role. At the same time the role partner, the head teacher for example, is not

only doing a lot of testing and interpretive work but also striving to communicate his or her own value stance.

Sex, age and ethnicity set up their own constraints (Cordingley *et al.*, 2002). While these are under researched factors in educational contexts, Clutterbuck (1991) found that the various configurations of male and female mentors and protégés in business settings were significant issues. Sapadin's (1988) study of professionals showing that men and women experience friendships differently while also pertinent to critical friend relationships, is necessarily contingent on the situation and structures within which those encounters occur. Spillane (2004) reminds us that in referring to the structures we need to be cognisant not simply of organizational structures but also broader societal structures including race, class, and gender and the manner in which these manifest themselves in interactions in the execution of teaching, leadership or consultancy tasks.

These differentials of age and status may add further impediments, particularly in the initial stages of a relationship, which as Dodds and Waters (1993) indicate, may prove crucial in countering or establishing expectations and negotiating working practices. Both parties may invest effort in overcoming prejudices and preconceptions, perhaps reaching an uneasy truce or developing such a comfortable familiarity that it begins to blunt the observations of the critical friend. Both parties may collude, consciously or unconsciously, in creating an alliance more congenial than challenging. It is a point made by Munby (as reported by Shaw) in relation to the Miliband proposal that another head teacher should be the 'school improvement partner'.

> Head teachers are excellent at the support and then encouragement, but they are less good at the challenge. How can we be sure the challenge will be there? (Shaw, 2004)

A range of clients

All of this does tend to assume a critical friend relationship as a one-to-one relationship akin to coaching or mentoring. However, more typically, critical friends have a wider remit, one which often extends beyond the head or senior leadership team to be a friend to the school as a whole.

The entry point for the critical friend is typically with the head teacher. He or she is described by Schein (1997) as the 'contact client', but as the relationship with the school develops the critical friend begins to work with a wider range of people, some directly and some who, by virtue of the critical friend's intervention are necessarily affected. Schein suggests six categories of client.

- *Contact client:* the individual who first contacts the consultant.
- *Intermediate client:* people who get involved.
- *Primary clients:* people who ultimately 'own' the problem, and typically are the ones who pay.
- *Unwitting clients:* people who are related to the primary client, and affected by the intervention, but not aware that they will be implicated.

- *Indirect clients:* members of the organization who are aware that they will be affected, and who may feel positively or negatively about it, but who are unknown to the consultant.
- *Ultimate clients:* anyone and everyone whose welfare must be considered by the consultant.

In a school context the ultimate clients are generally assumed to be the pupils. The very purpose of the critical friend's involvement is implicitly to benefit their learning or, in ministerial terms, to 'raise standards'. This may not, however, be the way in which the critical friend perceives her role or function and she might not be inclined to measure her success in terms of raised test scores. While for policymakers, fixated with the comparative performance and international surveys, enhancing performance may be the *raison d'etre* of self-evaluation, from the critical friend's viewpoint self-evaluation may be seen more in terms of capacity-building, professional development or learning how to learn. They may challenge rather than reinforce the orthodoxy of testing, value-added and other seminal tenets of government policy.

Such purposes may remain implicit and be at odds with the way in which intermediate or indirect clients measure the critical friend's effect. In an ongoing ESRC project (James *et al.*, 2003) in which researchers have independently been collecting evidence of the critical friends' impact and value to the school, their contribution has often been evaluated by teachers in instrumental terms, that is in direct relevance to their classroom practice or current policy priorities. Senior management in the same school with the same critical friend have tended to value the relationship differently, bringing to it a broader, whole school perspective.

Different models of school self-evaluation cast the critical friend in different roles, with priority given to different clients. The NUT model (MacBeath, 1999) portrays the critical friend as a supportive yet challenging facilitator, aiding and encouraging the evolution of a process uniquely tailored to the values of the school community, where the concerns of the various clients are closely aligned. By contrast, the priority for a critical friend actually working with a school evaluating itself using the Ofsted framework may be more of a regulator, ensuring that the judgements reached are in line with those that Ofsted inspectors will make, and that evidence is collated to cover the aspects highlighted in the framework. The role of the critical friend as depicted in *A new relationship with schools* (DfES, 2004a) combines adjudication, negotiation and mediation, and suggests that the concerns of the clients (pupils, parents, teachers, managers, governors, local and central government) are disparate and possibly at odds.

Differing expectations and priorities can create tensions for the critical friend who may experience ambivalence in her feelings of accountability, perhaps even divided loyalties. For example, in the Improving School Effectiveness Project there was, in more than one school, a palpable hostility between staff and the head teacher, both parties vying for alignment of the critical friend with their point of view (Doherty *et al.*, 2001). For this reason time to develop relationships is a key element of the critical friend's work.

Time and timing

Developing a friendship takes time. Where friends are decided for us and the relationship resembles an arranged marriage, the early stages of the partnership are a time of familiarization and testing. In a study of head teachers and LEA officers (Swaffield, 2002) both parties referred to such a period of testing the relationship. A head teacher talked of partners weighing each other up over the first two or three visits. LEA colleagues spoke of earning the head teachers' respect early in the relationship, through making constructive suggestions, solving practical problems, negotiating rules of engagement, and by creating boundaries but not barriers. Learmonth and Lowers (1998) stress the importance of establishing credibility for ensuring that early successes are attributed to the critical friend.

Self-evaluation is highly time sensitive and where and when the intervention or support of the critical friend comes is a factor to be carefully weighed. As Earl and Lee (1998) comment: 'it is not just quantity, or even quality, of support that matters, but access to the right type of intervention at the right time' (p. 76).

Most models of self-evaluation present it as a cycle. It is akin to review or audit, taking place at a given time, with its own rhythm of planning, data collection, analysis, presentation of findings and agreeing next steps. Hong Kong, for example, has recently moved to a system of school self-evaluation followed by external school review (referred to colloquially by school staff as SSE and ESR) in which the external team focus on the school's own grading of its various facets and together with the leadership team negotiate a final set of scores. This, typifying Alvik's sequential model, is now also common to many countries of the world and tends to define or constrain the role of the critical friend.

In the sequential model the critical friend may be cast in a tactical or strategic role, essentially helping the school to present its best face for external review. If time and costs are less of an issue he or she may play a part in the longer term improvement process. Ultimately what the critical friend does, and where and when she arrives on the scene, whether at the end of the cycle or in the early days of planning, depends to a large extent on the self-evaluation model in play. The more buttoned down, prescribed or mechanistic the model the less the need for the critical friend at given stages and perhaps even not at all. By contrast, the more open the process, the more significant the role of friendly and critical support.

In the National Union of Teachers project in the mid-nineties (MacBeath *et al.*, 1996), for example, there was no predetermined framework, no pre-existing set of criteria, no top-down mandate for the development of the process. Pupils, parents, teachers, governors and school management had the task of generating the 'indicators' by which they wished to be evaluated. It was a process that required skilful facilitation on the part of the critical friend, helping to draw out and articulate the 'careabouts', agreeing the things that really mattered and that were seen by the relevant stakeholder group worth framing as criteria. From the outset, therefore, the critical friend had the role of shaping the direction of the process.

Where self-evaluation is more open, exploratory, formative and with no immediate political accountability for its outcomes, it lies closer to action research or co-inquiry

(Elliott, 1991; Palus & Horth, 2002). The critical friend is less constrained by policy preconditions and pressures but more observant of rules of engagement and accountability to a research tradition.

What can a critical friend do to support self-evaluation?

As we have argued the context in which schools conduct self-evaluation determines to a considerable extent the nature of the support that the critical friend is able to offer. Where self-evaluation is entered into voluntarily with the singular purpose of self-improvement, the latitude for the critical friend is wide and potentially highly creative. In a policy climate in which self-evaluation is mandated and subject to external inspection the role is more politicized and the stakes are higher. The other key determinants are time and the stage of development of the school on its self-evaluation journey. Without continuity of contact and time to develop the relationship potential is diminished. Without understanding of the school's history with self-evaluation and inspection it can become a frustrating experience for all parties.

Taking time to get to know the school, suspending judgement, listening and learning are the starting point for the critical friend. At the same time it is important to recognize that school colleagues may be impatient for advice and may expect premature expert solutions. Questioning to find out may also be questioning which raises awareness, prompts self-reflection and in the process is a reassurance of the expertise that the critical friend brings.

Early in the relationship the critical friend contributes to the creation of the climate for self-evaluation by helping school leaders articulate their reasons for becoming involved in the process. He or she helps to ensure that the purposes are clear, that the various groups within, and connected to, the school are committed to it, and that the relationship with related activities, such as external inspection, are understood.

If planning for self-evaluation is already well developed the critical friend may probe the rationale for the adoption of a framework or criteria. Adoption of the Ofsted framework, for example, may stem from a variety of motives, perhaps well thought through, perhaps simply an ill-considered and reflex response. If the school has devised its own framework and criteria how robust, valid or practical are these? How do they sit within a local authority or national context? What is their relationship to external quality assurance?

The critical friend may wish to challenge the narrowness or breadth of the enterprise. Is it too ambitious, lacking in focus? Is it too singularly concerned with the easily measurable? Are students, parents, and the local community to be involved? For what purpose? With what authority? With what ethical considerations in mind? What expectations and issues may the process set in train?

The critical friend can also play a role in facilitating the process, running sessions, modeling procedures, for example ensuring participants keep to ground rules for brainstorming, creating opportunities to hear opposing points of view and helping

people to suspend judgement. One of the hardest tasks he or she faces is in pressing for evidence, encouraging heads, teachers or students, to be more critical, more demanding as to what counts as verifiable. At the same time the critical friend can assist in demystifying data, taking the fear out of numbers, making concepts such as value-added accessible and usable.

Further research-related skills come into play such as advising on different information gathering approaches for different purposes, suggesting innovative, less commonly used methods such as photo or video evaluation, 'spot checks' or critical incident analysis (MacBeath, 2002; Schratz & Löffler-Anzböck, 2004). There is an implicit brokering function, identifying useful resources, toolboxes, with advice on discriminating the most powerful and economic of instruments. He or she may suggest, or provide, useful reference sources and readings to stimulate and extend thought and may share knowledge and experience of other schools' approaches to self-evaluation.

In some instances the critical friend may collect data, by conducting interviews, for example. While often the job of data collection is done by the researcher or by the school itself, the job of feeding back the data often falls to the critical friend. This can be one of the most sensitive and telling aspects of the whole process, and how the critical friend handles this may be highly influential in determining how data are received and subsequently used. An aspect of this process may be assisting with analysis and interpretation of data, perhaps suggesting possible courses of action in response to the findings of self-evaluation. As we have found in every project where sensitive data is fed back, the critical friend finds herself offering reassurance, usually to head teachers who discover that their own evaluations do not match that of their staff (for example, MacBeath & Mortimore, 2001).

At every stage of the process he or she acts as a sounding board for testing out emerging ideas and insights, combining these with provocative questions, knowing those which challenge, clarify and deepen understanding without threatening and creating defensiveness. However, the success of a critical friend in supporting school self-evaluation is not solely dependent upon the characteristics of the particular person engaged in that role. Responsibility also rests with the head teacher and others in the school, all of whom can influence the relationship, enhancing or undermining the critical friend's work and effectiveness (Swaffield, 2003).

Clarifying and agreeing roles and boundaries at the beginning of the process, checking and redefining them if necessary as the work progresses, and ensuring everyone understands respective roles, are all crucial. Agreements and under-standings about what the critical friend will and will not do, limits of confidentiality, and lines of reporting, all need to be carefully considered.

In summary

The accumulating evidence on the work of critical friends in relation to school self-evaluation leads us to take a cautious and critical view of too careless a use of the term. There has to be clarity as to what the critical friend 'is' as well as 'is not'.

Governments are prone to cherry picking good ideas and incorporating them into policy initiatives. Currently in England head teachers countrywide are being trained as consultant leaders to form a cadre of people who may be appointed as critical friends. Such additional support may prove highly beneficial to schools in difficulty but as trained, appointed and government sponsored critical friends it may be difficult for them to stray too far from policy agendas and political objectives. The freedom to be intellectually subversive and challenging of received wisdom lies close to the heart of the critical friend's value and purpose.

Notes

1. Schools Must Speak for Themselves (MacBeath, 1999); Self-evaluation in European schools (MacBeath *et al.*, 2000); Improving School Effectiveness (MacBeath & Mortimore, 2001); LEA Inspectors as Critical Friends (Swaffield, 2002); Learning how to Learn (James *et al.*, 2003); Leadership for Learning: Carpe Vitam (Frost & Swaffield, 2004).

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