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# **What makes a critical friend?**

## **Our journey in understanding this complicated term**

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The notion of critical friends (CFs) has been encouraged (Samaras & Roberts, 2011) and extensively documented within self-study methodology (Bullough & Pinnegar, 2001). Indeed, “a defining feature of self-study research and practice is its emphasis on collaboration with others” (Berry & Russell, 2014, p. 195). We, two teacher educators and close friends (personally and professionally) from the United States, have been conducting self-studies over the past ten years, often employing CFs. However, not until this self-study did we realize we were not always responsible brokers of this complicated term.

That said, in our previous self-studies (Frambaugh-Kritzer & Stolle, 2016; 2014) our ‘behind the scenes’ use of CFs was ethical within the research process, yet we often referred to CFs superficially in our publications, essentially using it as a way to ensure trustworthiness, without a clear description of how we overtly applied CFs. Although humbling to declare, we recognize that identifying this limitation in our own work allowed us to work towards a “pursuit of enhanced understanding” (LaBoskey, 2004, p. 840), which is the central focus of this self-study.

Therefore, guided by LaBoskey’s (2004) five conditions for self-study, we engaged in an interactive inquiry to explore the complexities of engaging with CFs. Specifically, we sought to answer: How does our interactive inquiry on the topic of CFs, while working with two additional CFSs, coupled with a content analysis of peer reviewed self-study literature, lead us to new understandings of CFs?

We recognize that CFs is not an exclusive term for self-study methods (Baskerville & Goldblatt, 2009), and we are not the first to inquire about CFs as many have explored definitions (Costa & Kallick, 1993), offered critiques (Russell & Schuck, 2004), explored diverse roles (Kember, et al., 1997), argued for the need and process (Loughran & Northfield, 1996), and presented models on the developmental phases CFs may go through (Baskerville & Goldblatt, 2009). Despite these numerous contributions, we seek to fill a gap in the literature by offering a unique context in which we conducted a content analysis, while applying CFs, to better understand CFs as a research tool, thus improving ourselves as self-study researchers versus teacher educators. We highlight this differentiation because, in the literature, CFs is applied most consistently in two areas: someone supporting/coaching the transformation of another’s teaching, or someone supporting the trustworthiness of research methods.

Three theoretical perspectives served as our lens for examining and reflecting on CFs. First, social constructivism guided our work. In particular, Vygotsky (1978) explained the notion of More Knowledgeable Other (MKO), which means looking to others who have deeper or different understandings. Vygotsky further stressed the fundamental role of social interaction in

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the development of cognition, as he believed these interactions were central in the process of making meaning. Therefore, we embraced Vygotsky's ideas to generate understandings through talk by inviting two additional CFs participants to serve as MKOs.

We also drew from Fleck's (1935/1979) notions of Thought Collective, which situate the discovery of new epistemological cognition within the greater environment of knowledge. In this, Fleck understood knowledge creation as a social practice dependent on a shared framework. Considering both our personal understandings for CFs, and the collective, our knowledge discovery was an interaction between the discovered phenomenon (new understandings of CFs), the discoverers (Authors and CFs), and the existing pool of knowledge (literature defining and using CFs). By situating our individual discoveries within the community of interacting researchers, we met the purposes of self-study—to grow the individual while growing the field. However, more importantly, we felt confident in our own thinking, as we tangibly saw how it fit within the collective.

Finally, we drew upon Dewey's (1910/1933) conceptual work on reflective thinking. The term reflective thinking, like CFs, has become loosely defined and commonplace. Rodgers (2002) synthesized Dewey's work, paring reflective thinking down to four criteria. Reflection is: (1) a meaning-making process highlighting relationships, (2) systematic and rooting in scientific inquiry, (3) collaborative and happening in community, and (4) personal and valuing intellectual growth. As we engaged in this inquiry, we noted how our thinking displayed these criteria while complementing the MKO (Vygotsky, 1978) and Collective Thought (Fleck, 1935/1979) perspectives and generated new meaning with others through reflection. We noted power in these three perspectives coming together, providing space to discuss and question, reflect, challenge, and push our thinking and learning.

## **Methods**

### **Participants**

We both self-identify as white, middle-aged females working as tenured literacy teacher educators at different universities in the United States. Prior to this self-study, Elizabeth had been engaged in self-study research for seven years, while Charlotte had ten years of experience in self-study methods. Yet, we still could not pin down what we meant by CFs. So, informed by the literature, in particular the term "layered CFs" (Fletcher, Chrónín, & O'Sullivan, 2016), we strategically invited two more participants to serve as additional CFs in this study. Anne Freese, a U.S. self-study scholar acted as our MKO in the field of self-study. She is an insider who has published multiple self-studies and is also cited extensively for her contributions. Anne is a colleague and friend of Charlotte, but stranger to Elizabeth. Anders Persson, a veteran sociologist in education from Sweden, acted as our MKO in critical research. He is an outsider to self-study. Anders is a colleague of Elizabeth and stranger to Charlotte.

### **Data collection and analysis**

To address our research question, we collected: (a) artifacts from the self-study scholarship/literature, (b) written and real-time (audio recorded) dialogue, and (c) CFs response memos.

First, we conducted a content analysis of the CFs literature. We positioned the authors of these studies as our 'distant MKOs'. To learn from them, we gathered previous Castle Proceedings (2008-2016), and applied digital search tools and manual scans to obtain any article that applied/mentioned CFs. Next, we created a table to record: each reference, the research questions, and a summary of use and definitions of CFs. We used frequency counts to categorize the data and establish patterns for how CFs was defined and implemented. In our initial analysis,

we noted, similar to our own work, CFs was often referred to shallowly (i.e., namedropped or brief sentence mentioned) without describing the ‘how’ of CFs. We wondered if this was largely due to word-space limitations in the Castle proceedings, or the presumption that other self-study scholars already know what CFs means. Hence, we expanded our review to examine reputable teacher education and self-study journals spanning the past 10 years. We found overall that these articles were more robust in CFs explanations. Further, our intensive review provided multiple examples of the characteristics of CFs, which will be explored in the findings.

Simultaneously, we exchanged lengthy written responses shared in a Google drive document over a 7-month period of time. We also orally dialogued 1-2 times a month, serving as CFs who sought to co-construct CFs in a safe space. Next, we determined clear goals/expectations (Russell & Schuck, 2004) for Anne and Anders, asking each to write “critical friend memos” (Samaras & Roberts, 2011, p. 45) to our dialogue and manuscript drafts with the following guiding questions: (1) What questions do you have that can push our thinking about CFs?; and (2) Do you notice any blind spots in our thinking? Based on these response memos, we continued our dialogue, writing two more responses and engaging in two additional real-time conversations. These memos were included as data sources to consider, unpack, and juxtapose with our own initial thinking and findings.

Finally, we each individually read and reread the data, coding for recurring themes. Applying Coia and Taylor’s (2009) argument—“real-time dialogue” is critical “to process and discuss meaning” (p. 177), our analysis occurred as we analyzed our coding when we spoke in real-time, which led to the determination of our initial themes. Moreover, these meaningful exchanges allowed us to enact our theoretical belief that thinking is socially constructed (Vygotsky, 1978). Combining these various methods allowed us to systematically analyze our data (Samaras & Freese, 2009), and link the initial themes to our theoretical framework resulting in the following findings.

## **Findings**

### **Complicated terms require flexibility in definitions**

Through both our extensive content analysis and collaborative dialogue, the data implied CFs is diversely defined and actualized and takes on a lot of variance. Despite this reality, in analyzing the CF response memos, we became aware of our own insistence on pinning down a definition of CFs. For example, in a few of the written dialogues Elizabeth continuously sought to reign in the term, even resorting to look up ‘critical’ and ‘friend’ in the Webster dictionary for a more-narrow definition. This influenced Charlotte to seek a narrower understanding as well. However, it was our CFs who independently prompted us to consider establishing a more flexible understanding of CFs.

With this new insight, we continued dialoguing—systematically sorting out our thinking, which resulted in our creation of a continuum we call the Critical Friend Definition Continuum (see Table 1). Each term within the continuum, both on the left and the right, reflect the repeated definitional terms used within the literature when describing the different ways CFs can operate. We want to stress that these terms never implied value (e.g., CFs who are close friends are more effective/productive than strangers, or vice versa). Therefore, the continuum demonstrates variance in the term as it can be applied.

Table 1  
*Critical Friend Definition Continuum*

Close Friend(s)	←—————→	Stranger(s)
Insider(s)		Outsider(s)
Expert(s)		Non-Expert(s)
Fully Involved		Loosely Involved
Multiple CFs		Single CF
Productive		Not Productive
Defined Expectations		No Defined Expectations

Constructing this continuum illustrated the dynamic interactions in relation to the Thought Collective, which ultimately made what appeared complex and messy into something clear and flexible. Charlotte reflected, “Anne and Anders have opened my eyes. It was their encouragement that has brought me more flexibility to the CFs definition”. Elizabeth also noted that she no longer felt rigid about this term, but felt new freedom in how she could apply CFs within her own research.

**Complicated terms require complex characteristics**

After we constructed Table 1, we also identified three characteristics embedded in CFs that we think central to CFs effectiveness—vulnerability, reflection, and skepticism. However, influenced by our new understandings of a continuum, we also found variance exists in how each characteristic is employed, valued, or enacted.

**Vulnerability.** We align with Brown’s (2013) definition that vulnerability means uncertainty, risk and emotional exposure. Our content analysis showed vulnerability as a central concept of CFs, yet a range of experiences was described in the literature. Our dialogue exposed the conundrums we have faced in our own CFs work surrounding vulnerability. For instance, as close friends, we feel safe to take risks in our collaborations. Yet, we recognize our limitations such as: worrying about hurt feelings or our limited perspectives. For example, Elizabeth wrote:  
 My gut reaction is that self-study researchers need to be ‘tougher-skinned’ and less sensitive. However, does sensitivity lead to honest insight? . . . Ultimately, if we avoid vulnerability, we block out uncomfortable feelings, yet we also lose on the joy of discovery. Vulnerability gets to meaning.

Charlotte embraced vulnerability more readily as she wrote:

I recall 10 years ago my doctoral advisor suggested I make my vulnerability visible in my dissertation, which used self-study methods . . . I agree vulnerability is critical to CFs, but I know *vulnerability* is a central notion to self-study in general.

Based on this initial finding, we decisively embraced vulnerability by inviting our CFs to the study, bringing in additional critical lenses. Anders added to the data set by asking, “So what kind of relation is needed if CFs is going to work? CFs is about having a friendly (meaning trustful) relation so that you, if needed, can give hard critique.” We agree, while recognizing the vulnerability needed to both give and receive the ‘hard critique’.

**Reflection.** Using Rodgers’ (2002) synthesis of reflective thinking, we came to see the importance of true reflection within CFs, specifically when we systematically reflected on “definite units that are linked together so that there is a sustained movement to a common end” (Dewey, 1910/1933, p. 5). This resonated with our understandings of Fleck (1935/1979) in that our knowledge discovery was an interaction between our new understandings of CFs, us (the participants), and the current literature defining and using CFs within the field. Therefore,

reflection required the ability to move between personal discovery and an appreciation for the Thought Collective of CFs in the field. For example, Elizabeth wrote:

To think through these ideas, I'm exploring the literature. First, I looked at how researchers have used CFs as a data analysis tool. Then, I looked at how others have written about CFs. Today I read two pieces that unpacked complexities within CFs.

Charlotte responded:

I read the Russell and Schuck (2004) article you referenced earlier—this as an influential study using CFs. They write, “A CFS becomes an additional layer of self-study...” This can be a starting point for our paper as we identify a gap in the literature.

The data revealed our reflection was systematic—a rigorous way of thinking about CFs, while seeking to make meaning in logical, yet connected and interactive ways. And, as CFs is essentially a specific form of collaboration, it seamlessly relates to Dewey's notions that reflection happens in community.

Our CFs were instrumental as well in our reflection. For example, Anne consistently encouraged us to reflect on the role of reflective practice within the field of self-study, not just within CFs. Anders offered critique that at times our reflection was too individualistic, and we needed to look at the collective perspective of CFs. Thus, grounding our reflective work in the greater conversations, often with those we considered MKOs, felt empowering and collegial.

**Skepticism.** The data highlighted recurring questions we couldn't shake, such as: How do we know a CFs has met his/her responsibilities? Therefore, we came to understand skepticism as a healthy characteristic of CFs. For example, Charlotte wrote:

Although there are many requirements of CFs (i.e., fresh eyes, alternative perspective, overcoming bias), I still wonder—what if the CF fails to do this? What if the CF thinks he/she is offering fresh eyes, but actually isn't? How can we better ensure the CF meets these goals overtly? Is there a better checklist, especially when CFs come from the same sociocultural worldviews?

Elizabeth offered a solution to some of her own skepticism when writing:

As I take a personal look at our work as CFs, I wonder if we are limited in our abilities to ask the critical questions always necessary to push our thinking further because we are best friends. This is where the 'outsider' is key to insure CFs is effective.

Our content analysis showed that knowing if a CF met his/her responsibilities was not always clearly presented in the literature where CFs was applied. Anne shared specific questions she believes should be asked when using CFs within a study:

Start: Why should I have CFs?; What is the purpose of CFs?; What do I hope to gain?

Throughout: What do the CFs do? What should the CFs reflect on?

End: How did the CFs impact the study? Did the CFs offer alternate perspectives, lead you to new insights, or help to reframe your thinking?

Asking these questions at various points throughout a self-study could bring more clarity and purpose to the use of CFs. Thus, healthy skepticism insures the CFs' success.

### **Complicated terms require multiple learning phases**

Anne and Anders introduced phases they noted we were experiencing in our learning process, similar to others grappling with complicated terms.

**Phases of understanding.** Anne compared our inquiry to her own when she first started self-study. Like us, she sought to lock down a definition of self-study versus seeing it on a continuum. She and her co-authors (Freese, Kosnik, & LaBoskey, 2000) went through five phases they identified as: (a) confusion, (b) conflicting agendas, (c) multiple agendas, (d)

understanding, and (e) internalization. After reading our dialogues, Anne shared, “every scholar, at some point in self-study, takes his/her turn at being confused, while other self-study researchers, who have been exploring CFs for a number of years, may have moved to a different level/understanding of CFs”. The data shows we progressed through various phases of understanding, similar to the phases Anne highlighted.

**Phases of enactment.** Anders explained in one memo that CFs could entail a range of enactment phases; one being a “traditional academic seminar”, which he came to know as “the purgatory” during his doctoral studies. In this purgatory setting, critique is brutally honest with no rules, as often the actors are unsure of the purpose of the critique (a contribution to the other’s text or a show of the critic on a stage called the seminar). The other extreme includes what Anders referred to as the “safe room”—an overregulated space that is too friendly, and thus less productive.

The data revealed multiple ways we attempted to make sense of how CFs was being enacted. For example, we considered the differences between CFs and blind review, specifically in relation to the different roles each has/places his/her loyalties. Anders suggested CFs should be loyal to the person being criticized, especially the text, idea etc. created, while the reviewer is supposed to be loyal to the community he/she represents. Our dialogue identified an attempt to distinguish these different enactments. Elizabeth highlighted a quote from the Forward of the 2016 Castle Proceedings:

We strive to look at our data systematically, to ensure that we do not attend only to the findings that support our hopes and wishes. We work to ensure our interpretations are ones others could support, and this is the reason why self-study requires not only a critical friend, but also a critical community. (Trumbull, 2004, pp. 1225-1226)

Elizabeth then wrote, “So, is the whole S-STEP community my critical friend, and if yes, then does a blind-peer review act as a CFs? Where does that fit within Anders’s range of enactment?”

### **Discussion & implications**

Our interactive inquiry filled a gap in the literature—not only expanding meaningfulness of CFs for our own purposes, but for the self-study community as a whole. To illustrate this new understanding of CFs, we offer a journey metaphor as it applies to our own learning, yet aligned with our three theoretical perspectives, which showed learning from our MKOs (Vygotsky), reflection (Dewey), and knowledge gained via Collective Thought (Fleck).

We, the primary travelers (Elizabeth and Charlotte) of this self-study, embarked on this journey asking a research question to determine our destination. However, as avid travelers, we recognized the unpredictable nature of travel, which requires flexibility and numerous resources for safe arrival at the destination. So, we invited two CFs/MKOs as travel partners to serve as resources along the journey. Together, we collaboratively used the research question to determine goals and purposes for their inclusion. Anne shared veteran wisdom to the paths we traveled as she acted as an *insider to self-study methods*. Anders acted as an *outsider to self-study*, yet shifted our path through another country (Sweden) where his landscape and fresh eyes gave us a new lens. Each traveling partner positioned CFs differently, offering something unique and acting as a distinct resource, specifically when we faced obstacles. During our travels, both CFs recommended alternate views for us to consider, often highlighting unexpected issues that we didn’t anticipate or recognize. This journey became a highly infused experience as Elizabeth and Charlotte acted as CFs and co-researchers while layering in Anne and Anders. And, although the destination is now realized within this publication, we recognize the ongoing journey in which we engage as lifelong learners.

Although the journey metaphor is often overused; it assisted us in reconciling the diverse use of CFs found in our content analysis of the literature. Additionally, we hope our journey provides more clarification for how CFs could be used in future endeavors. That is, the interaction between the determined destination (new understandings of CFs), the travelers (Authors and CFs), and the landscape (literature defining and using CFs), not only grew us as self-study researchers, but also added to the Thought Collective around CFs. Therefore, before we make any new trek, we assert from our learning that we must be responsible travelers by explicitly explaining our purpose, definition and use of CFs within the Critical Friend Definition Continuum we developed.

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