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Adapting a Critical Friends Consultancy to a Virtual Environment

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Adapting a Critical Friends Consultancy to a Virtual Environment

About EdPrepLab

Educator Preparation Laboratory (EdPrepLab), an initiative of the Learning Policy Institute and Bank Street Graduate School of Education, aims to strengthen educator preparation in the United States by building the collaborative capacity of preparation programs, school districts, and state policymakers. Linking research, policy, and practice, EdPrepLab supports preparation programs that are equity-focused, student-centered, and grounded in the science of learning and development and seeks to expand these approaches nationwide. This brief describes a portion of inquiry-based work between three members of the EdPrepLab network: Montclair State University; University of California, Los Angeles (UCLA); and University of California, Berkeley (UC Berkeley).

Acknowledgments

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Introduction

Montclair State University; University of California, Los Angeles (UCLA); and University of California, Berkeley (UC Berkeley) investigated the question, “How do we prepare anti-racist, socially just teachers and leaders?” through the adaptation of the Critical Friends Consultancy Protocol: Framing Consultancy Dilemmas Inquiry process (<https://schoolreforminitiative.org/doc/consultancy.pdf>). The project was designed as a cross-institutional collaboration, allowing participants to develop a greater understanding of each institutional context, scope of work, and strengths.

The project modified the Consultancy Protocol, which was originally developed by the School Reform Initiative. Used by members of each institutional team, the power of the protocol within existing programs was also a draw.

The group’s original plan was to conduct a combination of live meetings, site visits, and convenings with a virtual component, but with the onset of the COVID-19 pandemic in March of 2020, the project became fully virtual and no consultancies took place in person. Throughout the project, the cross-institutional Consultancy Protocol was iterated upon based on participant feedback.

This snapshot highlights how this collaboration, led by Jennifer Robinson, Executive Director of the Center for Pedagogy at Montclair State University, and Rebecca Cheung, Director of the Principal Leadership Institute at the University of California, Berkeley, adapted the consultancy model into a virtual environment and presents a set of best practices and tips to guide others who may wish to create a virtual consultancy model for their own institution or across institutions. In particular, we highlight the theme of trust and how developing rapport is critical to the functioning of a healthy consultancy model.

Materials included: Agendas and protocols for three consultancy sessions

WHAT IS A CRITICAL FRIENDS NETWORK?

The Consultancy Protocol has two main purposes: to develop participants' capacity to see and describe the dilemmas that are the essential material of their work and to help each other understand and deal with them. The process focuses on developing trusting collegial relationships that encourage reflective practice. This project aspired to use the essence of the Consultancy Protocol model but apply it on a broader scale to programs rather than classrooms by creating a Critical Friends *Network*, a cross-institutional community of educator preparation programs.

The work was originally structured to be a combination of virtual meetings and site visits, launching initially with a video conference meet and greet to establish the focus of the inquiry itself. Next came the initial consultancy, a virtual video conference gathering. An in-person consultancy was planned immediately following the American Educational Research Association (AERA) Conference. The site visit was originally conceived as a one-day format to test the revised consultancy model in person. The final consultancy was conceived as a one-and-a-half-day event, allowing time for both program-alike networking and the consultancy process. The schedule was to include off-site visits to local schools, small group meeting time for role-alike groups, panel discussions, and a formal protocol. Due to the impact of the COVID-19 pandemic, the site visits were unable to proceed, so instead the group scheduled a set of three virtual consultancy meetings. A school partner participated in all three consultancies, adding a rich dimension to the discussions and feedback about the complexities of the work.

Setting Up for Consultancies

Given the size of each institutional team, the inquiry leaders formed a subcommittee consisting of two representatives from each campus who had experience with the Consultancy Protocol. The goal of the subcommittee was to provide feedback on the design of each consultancy, review feedback from post-meeting surveys, and organize all of the logistical aspects of the work. This subgroup was responsible for driving the timeline and leading the adaptation of the consultancy model. Due to massive upheaval from the onset of the COVID-19 pandemic, the group decided to begin with an initial meeting to establish trust and collaboration before launching right into a consultancy.



Quick Tips for Virtual Consultancy Set Up

Breakout Rooms:

- Put a subcommittee member in each breakout group to help guide the discussion
- Use a collaborative document (like Google Slides) for every group to take notes on themes that come up
- Assign roles for each group: timekeeper, reporter, and recorder

Technology Lead:

- Identify a point person for technology. This person can create the breakout rooms and bring everyone back together, so the facilitators can focus on the content of the discussion and the agenda
- Having someone who is not a facilitator be the host of the meeting also helps, because if people get dropped due to poor internet service, when they try to rejoin, it's challenging for the facilitator to have to stop to keep letting people back in

Materials:

- Provide materials in advance for participants to review. These could be supporting documents, such as an assignment or overview of a consultancy, or a bio sheet in advance to help you save time on introductions at the meeting

Agenda:

- Create a clear agenda with timing and share it with participants



ESTABLISHING TRUST

The participants engaged in a two-hour virtual meeting prior to starting the first consultancy. Members were invited to share why they were personally committed to anti-racist education.

The goal of this meeting was to learn about everyone's commitments to anti-racism practices and perspective—everyone had the opportunity to talk from a personal place about his or her own experiences around racism.

This initial meeting consisted of a group of 16 people from three institutions and consisted of a full group meeting then going into smaller breakout rooms. Breakout rooms allowed individuals to share their commitments to the work, before coming back together as a full group to share out. Rebecca and Jennifer pulled out common themes from the discussion and synthesized why the group was committed to eradicating racism. This was a powerful and valuable experience for the group.

After the meeting, Rebecca and Jennifer distributed a follow-up survey to determine when to have the next meeting and get feedback.

Building Trust in a Virtual Environment

Being open in a virtual environment can be even more challenging than when in person. For this project, the COVID-19 pandemic produced an additional challenge, as everyone's life was in a state of upheaval. Instead of ignoring this, Jennifer and Rebecca decided they would address people's states of mind head-on at the first meeting. Jennifer began with a reflection activity, where she named her gratitude for all the essential workers, and then she recognized that there are people who are in far less fortunate circumstances than herself and lifted them up as individuals who are going through this in a different way. She then opened the space to delve into the difficult topic the group was exploring. This is just one example of how Rebecca and Jennifer engaged in a thoughtful process of establishing and maintaining a strong sense of trust and community for all the participants.

Rebecca and Jennifer advise that building trust and rapport comes from moving slowly and taking small steps. They acknowledged that the topic they were exploring together is hard and growth comes slowly. Everyone enters the work at different stages of development of these concepts. From the start, they established the tone that everyone should extend grace and kindness to each other in their own personal development.

They are also careful to point out that the group was able to build trust and collaborate not only because of the relationship between members of the consultancy, but also because, as leads, they had trust between themselves. They modeled that trust and their institutions began to develop and form a sense of trust among them. Throughout this project, each institution came together on their own as a smaller group, debriefing as an institution about what is happening across their own teacher and leader preparation programs. Each group explored how to take this work to inform doing their own consultancies internally.

Summary of Consultancies

CONSULTANCY #1, FACILITATED BY UNIVERSITY OF CALIFORNIA, LOS ANGELES

Originally slated to take place virtually—and rescheduled three times because of the COVID-19 pandemic—the first consultancy was two hours and focused on the Education Leadership doctoral program at UCLA.

For this first consultancy, the plan was to have a direct transfer of the Consultancy Protocol into virtual space as much as possible. In adapting the consultancy to the virtual learning environment, the group did think about how much work people could process in real time, what kind of work could be done in advance, and what kind of materials they would share.

Context Setting

The facilitators started with the history of UCLA Center X to help the participants understand its unique and special context and highlight its mission. Then, a specific dilemma was presented by the new director of that program.

After exploring the rich history and structure of their program, the director shared out on her own identity and her own journey into this work. She situated her own racial and ethnic identity and how it led into her work with this doctoral program to make sure it reflected an anti-racist social justice perspective.

Core Dilemma

A core dilemma was then presented: despite the fact that this program exists, it grew out of but is not part of Center X, there is nothing in the description of the program that speaks to social justice. Prior to the meeting, the team polled students with questions about the program. These results were shared and then:

- The core question was posed to the group
- There was an opportunity for everyone to ask clarifying questions
- The group was split up into breakout groups to develop probing questions
- Following the breakout groups, the group came back together for a fishbowl discussion. Probing questions were put in the chat so they could be easily shared and seen

Feedback

Following the session, the facilitators asked for feedback on how they felt the process went. The subcommittee looked at the feedback from the UCLA team and participants and discussed how to restructure the next consultancy so it would be more generative of ideas to help answer the dilemma. They were reminded of how the purpose of inquiry is for us to learn from each other as they reflected and iterated the design for the next session.



Lessons Learned: Modifying Consultancies

Following the first consultancy, a participant shared a concern on the feedback survey about over-disclosing information. The subcommittee reflected on this feedback and explored the complexity of building trust and the layers of inquiry. They asked themselves, who should have permission to ask deep probing questions? How does the relationship between participants influence this? They acknowledged that probing questions can be provocative and direct, and as such they can be highly charged. As a result, they decided to implement a modification to the next consultancy: home institution members would get to start the probing questions, as a way to allow those closest to the inquiry to open the discussion space in a safe way.

CONSULTANCY #2, FACILITATED BY UNIVERSITY OF CALIFORNIA, BERKELEY

The second consultancy built on lessons learned from the first in terms of structuring the virtual consultancy. Rebecca and Jennifer reflected that this second consultancy really exemplified how effective inquiry is a process of growing and learning from each other's work.

While the first consultancy spent a lot of time context setting with the institutional history of Center X, which was critical to understand, the second consultancy focused on a core question that was more specific. Because the question was less broad, the group was able to dig in deeper to the topic and they decided to spend less time on the context.

Core Modifications to the Consultancy

Below are several modifications that were made for the second consultancy. At the end of the second consultancy, everyone felt that they pushed the model of adapting a consultancy to a virtual space even further.

1. Programmatic focus: Following the first consultancy, the subcommittee reviewed feedback and found that people wanted the second consultancy to focus on something more programmatic. Thus, the second consultancy centered around a very specific practice. Prior to the consultancy meeting, a redacted student response to an assignment was shared, which gave people a grounding place for the conversation and helped the group narrow in on their discussion.
2. Fishbowl: Normally, a fishbowl is done in a small circle when you are doing this kind of work in person. In a virtual environment, this is not possible. So, for the fishbowl, they asked everyone who was not in it to turn off their video, thus hiding non-participants so you could not see them. This created an intimacy and spotlight on people who were talking. This gave the visual illusion of a fishbowl more clearly.
3. Probing questions: Another modification was to allow the participants from the presenting institution to start with probing questions and then invite others to join. It seemed natural that the people who know the most would be able to participate the most and others benefit from hearing those dialogues, so this modification helped support that. The tool Padlet was used to post probing questions and then the group voted on which ones to explore.
4. Breakout rooms: A member of the Berkeley team was in every breakout room to support the development of the probing questions. This allowed for more time to be spent on probing questions, since the Berkeley member could answer the clarifying questions quickly in the breakout rooms. Each member of the Berkeley team prepared in advance to lead the breakout discussion by reviewing, ahead of time, the questions they would ask to lead this part of the agenda.

CONSULTANCY #3, FACILITATED BY MONTCLAIR STATE UNIVERSITY

Rebecca and Jennifer both agreed that the third and final virtual consultancy was the most effective, largely because the group had established such trust and rapport through all of the work together over the past year. Because they had engaged in two consultancies prior, and already opened up the dialogue with each other so much, the conversation was able to go deeper and the consultancy flowed with ease. The time was able to be maximized, as there were less logistics to cover (e.g., introductions, process, etc.) and more time was able to be spent on the topic at hand. In addition, the dilemma that was presented was carefully curated to be accessible to all of the different participants. It was broad and accessible enough that both teacher educators and leadership could actively engage and contribute equally and was grounded in practice: *How do educator preparation faculty meet the needs of students with different levels of anti-racism awareness?*

In terms of adaptations from the prior consultancies, there were a few small but meaningful changes.

1. Student voice: Bringing in student voice was a highlight of this consultancy. The words of teacher education students and their work were shared and used to situate the problem.
2. Notetakers: Another learning was that if you have enough people from the facilitating institution to put two members in each breakout room, one person can be a notetaker or silent observer, while the other an active contributor. The advantage of this is that the person who is taking notes can really capture the conversation verbatim. Though it is helpful sometimes

for a group to synthesize and interpret as they talk, having the actual words people are saying to refer back to later can be very helpful, and a dedicated notetaker can do this. The notetakers in each breakout room used a shared document that all notetakers could see, which was useful later to refer back to. When the large group came back together, the notetakers were the ones this time in the fishbowl with the dilemma presenter, and the notetakers were able to reflect back on all of the discussion and share new revelations they had while listening. They were able to convey the essence of the discussion they heard, while adding on their own new thoughts.

3. Icebreaker: The previous two consultancies did icebreakers, and these took up more time. For the final one, a shorter icebreaker was used because the group had grown comfortable with one another. So, the icebreaker that was done this time was shorter to just warm the group up and connect back to the work they had done previously since it had been quite a few months since they last met.

Final Thoughts

Though adapting the consultancy model to a virtual model posed some challenges, Rebecca, Jennifer, and their team found that it is overall a very viable option. There are even some great benefits. For example, it eliminates issues of cost and travel time, allowing institutions that are separated by geography to collaborate in ways that would be much more challenging if they had to work together in person. Each consultancy experience was rich in terms of depth of discussion and helping them see the complexity of the content.

A main challenge was melding the Consultancy Protocol with the pedagogy of engaging in deep conversations within the virtual environment, however, Jennifer reflected that by the third consultancy, the group was able to blend both technique and process that left them with a satisfying product.

Though building a sense of a virtual community is hard, Rebecca and Jennifer advise that if you put in the time at the start to share things that are important to you, gain trust, and develop deep investment from your team, it is very possible. Many of the members of this project never met in person, but they were able to go very deep into a highly challenging subject.

Even the length of time that passed between the final two consultancies did not impact their collaboration. Initially, Jennifer and Rebecca were concerned that they would have to reestablish themselves as a group given the length of time that had passed, but the consultancy format of large group and breakout groups, as well as clear protocols and guidelines, made it seamless. They were even able to bring in a new member to the final consultancy and integrate her into the process smoothly.

In the end, everyone who participated was able to walk away from the experience understanding the inquiry question and process more deeply and articulate some of the key areas that needed to be changed. They concluded that this challenge should not be taken on by siloed programs or faculty—this work needs to be done at the institutional and leadership levels.

Finally, though this was a cross-institutional project, and there was great benefit to that, Rebecca and Jennifer said that following the final consultancy, each team intends to debrief and do more intentional work on local inquiry. As a result of this experience, a cross-institutional research project is planned, with the intent of answering the following questions:

- What happens when three institutions come together to further our understanding of transformative preparation?
- What are the next steps after the three consultancies?
- How has this group orchestrated itself on the original objectives without the structures that were originally planned? (Transitional way of moving forward toward the objectives)
- What were the impacts on our particular programs?
- What institutional dilemmas were raised under the original overarching question?

Taking the learnings into action at each institution is essential.