# COMMUNITY OF PRACTICE CO-CREATION TOOLKIT – Version 1

Deliverable D2.3

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| Project acronym: | ACT |
| Project full title: | Communities of PrACTice for Accelerating Gender Equality and Institutional Change in Research and Innovation across Europe |
| Type of action: | Coordination and Support Action |
| Duration: | 1st May 2018 – 30th April 2021 (36 months) |
| Contract number: | Grant Agreement Number 788204 |
| Programme: | Horizon 2020 – Science with and for Society (SwafS-2017-1) |
| Deliverable number: | D2.3 |
| Work package: | WP2 |
| WP lead partner: | LoU (Task leaders: LoU, TUB & FLACSO) |
| Other partners involved: | SFI/UBA/DESY/CNRS/CRG/JU/ZRC SAZU/UoI/FUOC |
| Dissemination level: | Public |
| Document version: | 1 |
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| Due date: | April 30, 2019 (M12) |
| Submission date: | April 30, 2019 (M12) |

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 788204

## OBJECTIVES OF THE DELIVERABLE

The objective of this deliverable is to present the Communities of Practice (CoPs) co-creation toolkit.

Firstly, the draft briefly defines what co-creation activities are, the aim of the toolkit, and the end users of the toolkit. It then presents the theoretical underpinning of the toolkit. This is to ensure that the resources are linked to how communities of practice (CoP) develop, operate and what they need to become successful. The theoretical underpinning includes the CoP success factors, lifecycle phases, and the primary areas of activity.

Secondly, the document also presents how EIGE guidelines on GEPs inform the toolkit and moreover it suggests eight critical points CoP Members and Facilitators may want to consider when implementing an equality project.

Thirdly, the draft describes the participatory and visual methods in detail, along with printer friendly templates for some of the methods. It is also suggested how the website content could be visually designed and organised in the appendix.

Lastly, the document lists the online tools for CoPs available to use which is the Knowledge Sharing Hub built in connection with GenPORT.

It is important to emphasise that this toolkit is a living document which will be continuously tested, improved and adapted according to the CoP Facilitators' and Members' feedback to ensure it addresses their needs, their communities, the practice and the domain.

## CONSORTIUM

The ACT consortium consists of 17 partners: Fundació per a la Universitat Oberta de Catalunya (project coordinator, Spain), Portia (UK), NOTUS (Spain), Joanneum Research Forschungsgesellschaft MBH (Austria), Advance HE (formerly Equality Challenge Unit) (UK), Loughborough University (UK), Facultad Latinoamericana de Ciencias Sociales (Costa Rica[1]), Technische Universität Berlin (Germany), Karolinska Institutet (Sweden), Science Foundation Ireland (Ireland), Umweltbundesamt (Germany), Stiftung Deutsches Elektronen-Synchroton (Germany), Centre National de la Recherche Scientifique (France), Fundació Centre de Regulació Genòmica (Spain), Uniwersytet Jagiellonski (Poland), Znanstvenoraziskovalni Center Slovenske Akademije Znanosti in Umetnosti - ZRC SAZU (Slovenia), and Haskoli Islands (Iceland).

## TERMS OF USE

This document has been developed within ACT, a Coordination and Support Action project funded by the European Union's Horizon 2020 research and innovation programme.

[1] The action will be carried out in the department of UNESCO Regional Chair on Women, Science and Technology in Latin America FLACSO, located in Buenos Aires, Argentina.

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## KEYWORDS

Co-creation activities, participatory methods, CoP lifecycle phases, CoP success factors, CoP main areas of activity, online infrastructure

# ACRONYMS

| ACRONYM | MEANING |
|---|---|
| CoP | Community of Practice |
| EIGE | European Institute for Gender Equality |
| GE | Gender Equality |
| GEP | Gender Equality Plans |
| HE | Higher Education |
| R&I | Research and Innovation |

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# 1. INTRODUCTION

This draft presents the ACT Co-creation Toolkit and its design. It also shows how and with the help of which tools and methods the toolkit can help CoPs operate, develop, implement gender equality plans (GEP), implement gender equality measures and activities, and facilitate institutional change in relation to gender equality in HE and R&I.

The draft consists of the toolkit's theoretical framework which includes the EIGE roadmap to GEPs, eight tips for gender equality projects developed by Acker, success factors of CoPs, and the four areas of CoP activity. At the same time, the theoretical framework provides the structure for the design of the toolkit.

Based on the guidance drawn out of the theoretical frameworks the toolkit contains participatory methods for co-creation to support the CoPs, as well as tips for visual methods and online tools.

## 1.1 WHAT ARE CO-CREATION ACTIVITIES?

Co-creation activities within the toolkit are described as "practices where actors engage collaboratively in activities through interactions within a specific social context" (Frow et al., 2015: 26). The aim of co-creation is to collaborate, "create together", cooperate and share ideas, knowledge, practice, and build on the existing stocks to develop and further them. Co-creation in this toolkit thrives on equal contribution from the members and incorporating the diversity of voices and perspectives.

There are significant benefits of co-creation and these include: harnessing the active involvement of participants in co-creating; sharing resources and knowledge; enhancing innovation processes; providing network solutions; and contributing to the well-being of a service system (Frow et al., 2015). As co-creation is founded on participation and collaboration, the ACT Co-creation Toolkit will be based on a **variety of participatory methods** for consensus building, sharing of experiences and mentoring.

Given that much communication and idea/solution generation may occur online due to the time and space constraints, we have provided some tips on how to adapt the activities to online interactions. This will never be preferable to face-to-face communication, as physical interactions are more organic and spontaneous, however these online adaptations could help you structure the online meetings and improve communication, and help you reach your meeting goals. Where activities are adaptable online, there is an icon to identify this.

ADAPTABLE ONLINE

## 1.2 WHAT IS THE AIM OF THE TOOLKIT?

The aim of providing the ACT Co-creation Toolkit for CoPs is to help them successfully operate and self-develop, with a view to implementing gender equality plans in their institutions and across institutions and to implementing strategies, measures and actions in order to improve gender equality in and across their institutions, as well as to enhance institutional change on gender equality. It will also support CoPs in fostering an organisational culture which strives for gender equality. Therefore, the design of the toolkit will be partially informed by the European Institute for Gender Equality (EIGE) guide for establishing a GEP (EIGE, 2019). The suggested steps in these guidelines will be used as a springboard to identifying and designing the best participatory activities to support CoPs in GEP.

## 1.3 WHO IS THE TOOLKIT FOR?

The toolkit is designed to be used by the ACT Communities of Practice through two layers of interactions. Firstly, CoP Facilitators can engage and collaborate with their corresponding CoP Members to promote institutional change, and secondly, the CoP Members can then independently use these methods within their own institutions and communities.

Therefore, the toolkit strives to address both the “inner circle” of the ACT CoP consisting of its CoP Members, and also the efforts of the CoP Members within their own institutions.

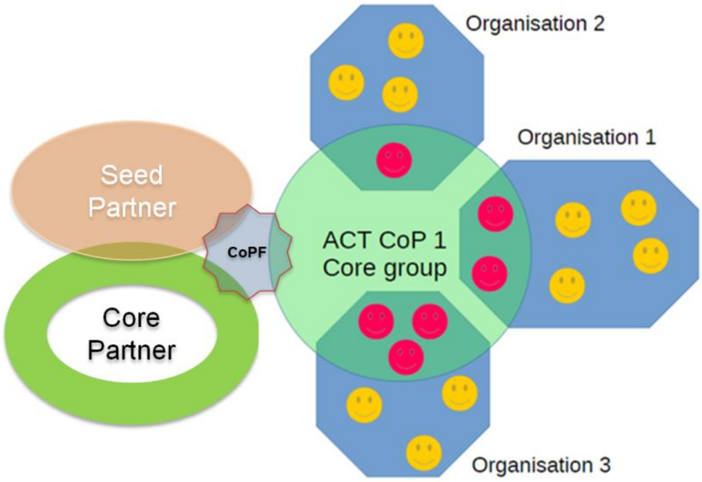


**Figure 1. ACT CoP Core Facilitation**

## 1.4 WHAT IS THE TOOLKIT’S CONCEPTUAL FRAMEWORK?

Additionally, the tool choice is primarily guided by the literature on:

1) CoPs success factors (various literature)
2) CoPs lifecycle phases (McDermott 2000);
3) CoPs’ 4 primary areas of activity (especially useful for the end user) (Cambridge et al. 2005).

Apart from providing a toolkit of activities that are built around the four areas of knowledge above, the toolkit will also provide **learning material** and some **background information** about those concepts to educate CoPs and raise awareness of their potential needs and how they can *take ownership of their own development*.


**Figure 2. Theoretical framework supporting the toolkit**

This means the ACT CoPs will develop their knowledge and understanding of which lifecycle stage they are at, what can make them successful, but also what are the most important activities that address their purpose and in which they can engage their community.

Additionally, based on Acker’s (2000) paper outlining eight gender contradictions (section 3) in organisational equality projects and Jackson et al.’s (2016) paper on a process called *Dialogues*, the toolkit will contain eight tips on how to emphasise inclusive and participatory departmental interactions.

The length of this additional learning material is to be concise and succinct to encourage the readers to familiarise themselves with and gain knowledge quickly, as it is assumed being part of a CoP is not their only role, and they might have busy schedules. Therefore, the material has to be kept reasonably short and reader-friendly.

There are many success factors, lifecycle stages and areas of activity for CoPs that the toolkit can be built around, however it is important that the toolkit and its navigation is as user-friendly as possible. The toolkit has to have an attractive appeal and ease of use. The toolkit available online will be designed in the following way:

The visual design of the toolkit is visualised as three buttons:

1. Adapted to the Cambridge et al.'s (2005) **four areas of activity**, which have been developed from the Wenger et al.'s (2002) original CoP concept and its elements of domain, practice and community, i.e. I want to… build relationships; learn and develop practice; take action; and create knowledge. Each button will suggest and provide a set of tools which are best for addressing the particular CoP “need”.
2. Adapted to the **lifecycle phases** by McDermott’s (2000), and each stage will populate a different set of suggested tools. For instance, if your CoPs is at the Prototype and Grow phases, *relationship building* and *learning* might be core (Cambridge et al., 2005), therefore, activities, such as ice-breakers, and skills and knowledge sharing activities might be suggested.
3. The **success factors** identified as conducted in the mini review of the available literature. Again, each success factor will have a set of suggested reading material about each factor plus some activities to help develop this factor.

The buttons will be professionally designed by a graphic designer to make sure that they are attractive, clear and user friendly. However, a rough visualisation is attached in Appendix 1.

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The following sections of the draft will focus on reviewing the literature guiding the toolkit choices and design, i.e. EIGE guide for establishing a gender equality plan, CoP success factors, CoP lifecycle phases and CoP four primary areas of activity.

## 2. EIGE GEP GUIDE INFORMING THE TOOLKIT

A roadmap to GEPs in research and higher education institutions has been designed by EIGE in 2016. As part of the GENERA project, a roadmap to the implementation of GEPs with similar 6 steps based on EIGE has also been developed in 2017[2].

EIGE's online tool is targeted at all staff such as research and teaching staff; human resources, administrative and support staff; middle and top-level management; whereas, GENERA's roadmap is aimed more at implementation managers (GENERA "Roadmap for the implementation of customized Gender Equality Plans", see page 3). Therefore, the EIGE guide's target audience is closely related to the members of ACT CoPs, which might comprise a variety of stakeholders at different seniority levels.

EIGE GEP Guide is a step-by-step guide on the process of setting up, implementing, monitoring and evaluating GEPs. The guide also contains hints about obstacles and challenges, along with suggestions on how to overcome them (EIGE, 2019).

The guidelines present **six main steps** to develop a Gender Equality Plan: getting started; analysing and assessing the state-of-play in the institution; setting up a Gender Equality Plan; implementing a Gender Equality Plan; monitoring progress and evaluating a Gender Equality Plan; and what comes after the Gender Equality Plan. It is important to note, that all the information is available on the EIGE website, and this document does not duplicate this work. However, as one of the aims of the toolkit is to facilitate CoPs in GEP implementation, it is important that the toolkit's design to *some extent* reflects these necessary steps as recommended by EIGE. Therefore, the toolkit will aim to identify **useful participatory methods** to assist CoP members in GEP implementation at each step of this process.

While these six steps focus on developing gender equality plans, the information, instructions and ultimately the respective methods can also be used for the development and implementation of specific actions and strategies towards more gender equality and institutional change. Table 1 illustrates how the toolkit could achieve this.

| EIGE SIX STEPS GUIDE | SUGGESTED METHODS |
|---|---|
| ***Step 1: Getting started*** | 1-2-4-All<br>Brainstorming<br>Four Quadrants Activity<br>Future Workshop<br>Mature your Ideas<br>Nine Whys<br>SWOT |
| ***Step 2: Analysing and assessing the state-of-play in the institution*** | Interview<br>Mature Your Ideas<br>PESTEL<br>Storyboards<br>What I Need From You |
| ***Step 3: Setting up a GEP*** | SMART Criteria<br>Critical Uncertainties<br>Plan of Change |

[2] https://genera-project.com/portia_web/D4.2_Roadmap_for_the_implementation_of_customized_Gender_Equality_Plans_rev1.pdf

| | |
|---|---|
| ***Step 4: Implementing a GEP*** | Critical Uncertainties<br>Fish Bowl<br>Plan of Change<br>Storyboards<br>World Café |
| ***Step 5: Monitoring progress and evaluating a GEP*** | Fish Bowl<br>Focus Groups<br>Photo/Video Documentation<br>Plan of Change |
| ***Step 6: What comes after the GEP*** | Future Workshop<br>Infographics<br>Nine Whys<br>W3: What, so What, now What |

**Table 1. EIGE Six Steps Guide and Suggested Methods**

EIGE Six Steps to Gender Equality Plan Implementation[3]:

**Step 1** is about getting started and remembering the importance of *context*. It advises GEP implementers to ask which actions would work best in their own institution, considering its objectives and relevant regional and national contexts. It also recommends finding *support* through involving gender experts, potential allies at different levels within and outside the institution and investigating possible funding opportunities for the gender equality work that needs to be undertaken.

Therefore, the toolkit identifies a suggested selection of useful methods to facilitate this step, such as 1-2-4-All, Brainstorming, Four Quadrants Activity, Future Workshop, Mature your Ideas, Nine Whys, SWOT.

**Step 2** concerns the assessment of the state-of-play of the institution which will provide insight which measures need to be implemented. The comprehensiveness of this initial analysis will depend on the available resources about sex-disaggregated data about staff and students; identifying the existing measures promoting gender equality; and reviewing relevant legislation and policies in the particular country.

Here, the toolkit could suggest methods such as Interview, Mature Your Ideas, PESTEL, Storyboards, What I Need From You.

**Step 3** involves setting up a GEP which needs to be holistic and integrated. The GEP needs to address a variety of issues relevant for the whole community and organisational system. The basic actions to be taken into consideration in the process of setting up a GEP include:

- ✓ getting inspiration from measures implemented by other organisations, but adapting these measures to the specificities of own context;
- ✓ defining SMART objectives and measures;
- ✓ defining the timeframe of the GEP and its implementation with monitoring periods;

[3] https://eige.europa.eu/sites/default/files/gear_roadmap_01_shortguide_0.pdf

- ✓ promoting the participation of actors through participatory approaches to help define meaningful measures and enhance the actors' willingness to implement the measures in the GEP;
- ✓ identifying and utilising existing resources when planning the measures;
- ✓ agreeing 'who is responsible for what and when';
- ✓ building alliances in stakeholders at all levels. Take time to explain what the GEP implies for all targeted stakeholders;
- ✓ ensuring the sustainability of gender equality actions, and embedding practices in the normal routines, policies and procedures of the organisation.

Therefore, the toolkit could suggest a number of activities and methods to facilitate this complex step, for example, SMART Criteria, Critical Uncertainties, and Plan of Change.

**Step 4** describes how to implement a GEP through embedding and institutionalising measures and actions. It is important to organise regular meetings with the responsible actors to design and plan activities in a participatory way, and to discuss the progress, main achievements and aspects to be improved. Continuing to engage stakeholders and giving visibility to the GEP are also of key importance. Making adaptations and adjustments may be required, as well as having to face obstacles and resistances.

The toolkit contains various participatory activities for these purposes, such as Critical Uncertainties, Fish Bowl, Plan of Change, Storyboards, World Café.

**Step 5** concerns monitoring progress and evaluating a GEP. Gender expertise (possibly external) may need to be considered in monitoring and evaluation processes, potentially along with other expertise on change dynamics or other specific issues tackled by the GEP. Indicators should be implementation-oriented and adapted to the purposes of the action. Monitoring does not mean looking only at figures and data; other underlying, qualitative aspects also need to be considered.[4]

Here, the toolkit could facilitate this step through methods such as Fish Bowl, Focus Groups, Photo/Video Documentation.

Plan of Change **Step 6** encourages consideration of starting a new cycle, as it is likely that the sustainability of some measures and procedures is already ensured, whereas others may still require further action, or new areas of attention may have been identified. This is the point where a decision needs to be made on how to continue the efforts undertaken so far and what any new GEP should address.

Therefore, the toolkit contains activities, such as Future Workshop, Infographics, Nine Whys, W3: What, so What, now What.

[4] A monitoring and evaluation tool has been developed in the GENERA project to test the progress of gender equality.

# 3. EIGHT TIPS FOR GENDER EQUALITY PROJECTS

Acker (2000) elaborates why gender equality projects conducted in organisations do not succeed and she identifies eight possible reasons for failure. She suggests that this situation may result from gender-equality projects adopting uncritical stances to organisational hierarchies. Moreover, she suggests that they do not recognise gender as tied to the organisation's most fundamental values and practices, which in turn exacerbate inefficient decision making, a lack of clarity of expectations and excessive controls. She argues that there has been a limited success in gender equality projects, because the change actors face eight contradictions between theirs *and* the organisation's goals and methods that are both targets and tools of change (2000).

The following tips included in the toolkit are informed by Acker's work, but also by Jackson et al.'s (2016) paper about a process called *Dialogues* the authors designed to emphasise inclusive and participatory interactions between departments by deliberately shaping iterative conversations and activities. This process was designed to address Acker's critique, and each contradiction informs the implementation of *Dialogues*. Therefore, the tips proposed in the toolkit are inspired and informed by the above two papers.

The figure below illustrates the eight steps.


**Figure 3. Acker's eight contradictions in GE projects.**

**Contradiction #1: POWER**: Change Agents have to accept to engage with multiple levels of an organisation while negotiating power differentials.

**What does it mean?** The research/activist project begins with a mixed message. The project should to "challenge the authority of long-established patterns and practices but could not even begin without the legitimacy conferred by long-established authority" (Acker, 2000: 626).

**TIP:** Elicit and demonstrate support from the top. Involve the leaders and members with a high level of political capital across the institution. Gather powerful allies.

**Contradiction #2: ROLES:** Change Agents occupy different roles and may hold less power within an organisation than those they are trying to encourage to adopt change practices.

**What does it mean?** Employee positions "do not have the direct control of work organisation and practices that line positions routinely involve. Thus, staff could not themselves implement changes, but would have to work through others to reach their goals" (Acker, 2000: 627).

**TIP:** Involving a selection of different participants may diversify the characteristics of the implementation team. It might be useful to involve external consultants, but also internal participants who work both inside and outside of the targeted department. This would help Change Agents to maintain a dual insider/outsider role. As the “insiders”, Change Agents share an institutional history and organisational roles similar to their institutional fellow members. As the “outsiders”, Change Agents can maintain objectivity, which might to some extent neutralise the role/power issues.

**Contradiction #3: DUAL AGENDA:** Dual agenda weakens gender equality goals.

**What does it mean?** Dual agenda approach to gender equality projects means that such projects can be successfully implemented only if gender equality can be linked to something else the organisation values, such as increased performance, profit, competitiveness, productivity, etc. Thus, such projects have twofold aims: gender equality and another organisational goal(s). However, this creates a catch-22: in order to reach equality goals, the Change Agents have to address organisational goals, but by focusing on organisational goals they obscure and slow down the gender ones.

**TIP:** Identify possible opportunities in the above challenge, by emphasising that in order to achieve the overall institutional mission gender equality, inclusivity, and diversity need to be instilled in the organisational departments. Demonstrate that gender equality will directly benefit those who hold power and contribute to the productivity or performance of their micro-contexts, such as individual faculties and divisions. Strategically gain buy-in.

**Contradiction #4: CONFLICT OF INTEREST:** The lack of congruence between the interests of various organisational members.

**What does it mean?** Not everyone will benefit from a change to the current system. Gender equality redistributes power, rewards and resources; therefore, it won’t be in everyone’s interest to support the project.

**TIP:** Ensure that the gender equality goal processes are embedded in activities that are contained in the annual reviews, or evaluation systems of those who may not directly benefit from a gender equality agenda. Again, emphasise other goals linked to solving business problems to secure allegiance to the project.

**Contradiction #5: POWER/CLASS:** Gender is embedded within power/class structures.

**What does it mean?** People in power, such as managers, may support gender equality generally, but as this would lead to employee empowerment, they may fear that the underlying power and class structures could become destabilised, and thus they might lose out.

**TIP:** Encourage representatives of both powerful/powerless groups to participate in the community and the project and do not separate them or differentiate them. Address both power/class and gender structures that cause inequalities.

**Contradiction #6: TIMING & RHYTHMS:** The timing and rhythms of gender equality plans may not fit the timing and rhythms of organisational operations.

**What does it mean?** Gender equality projects require time to reflect, to experiment, and to examine assumptions. This is very different to the rhythms and timing of doing business, which are often based on swiftness and a high tempo, rather than on a contemplative and judicious deliberation. As a result, Change Agents might be perceived as incompatible with the organisational senses of time and rhythm.

**TIP:** Align the gender equality project timeframe with the organisational strategy and aim to produce and accommodate your goals into the organisational goals.

**Contradiction #7: GENDER NEUTRALITY:** There is a persistent cultural representation of organisations as gender neutral.

**What does it mean?** Organisations are perceived as neutral, objective structures. They are believed to be goal-oriented and instrumental, and rewards are built around job demands, performance and seniority, but not gender. This understanding facilitates an individualistic view of success, influence, dedication, and performance. Any opposing view suggesting that a lack of success and recognition for women may be linked to gendered practices is treated with caution and suspicion. As a result, many women do not want to participate in gender equality projects, as they do not want to be seen "complaining" and want to succeed only on their own merits (Acker, 2000).

**TIP:** When setting up groups with participants, try to avoid dividing targeted groups by categories and drawing attention to the minorities. Try not to design groups by gender, race, rank, or any other factor. Shift the conversation away from the "needs" of some groups to the environment and decision-making processes of the institution/department as a group to benefit all.

**Contradiction #8: IDEAL WORKER NORMS:** People of all genders are generally evaluated for success according to their ability to display stereotypically male behaviours and characteristics.

**What does it mean?** People might be rewarded for demonstrating the ability to control, to be forceful, strong, assertive, eloquent, and results-oriented. These stereotypes help to continue systematic difficulties for organisations to embrace gender equality projects, but they also continue to be the favoured identities. Men, who themselves display these characteristics, may not be enthusiastic about projects that question these stereotypes, as they may not perceive them as dysfunctional. Gender equality projects, therefore, tend to be occupied mostly with women, as they have the capacity to be more mindful than men of the negative side of the stereotypical and gendered nature of organisational images of successful identities (Acker, 2000: 631).

**TIP:** Focus on group level processes rather than individual traits. For example, encourage the input of ideas from all groups and if helpful, use a variety of formats. Balance out opportunities for anonymous input with time for speaking to the group, as this will allow everyone to contribute regardless of their comfort levels of speaking. In participatory methods and activities, divide the process for individual reflection, small group interaction, and large group consensus testing.

# 4. COP SUCCESS FACTORS INFORMING THE TOOLKIT

The existing literature in relation to CoP success factors is diverse in terms of the contexts and CoPs' characteristics. However, there is a trend in the literature pointing to a recurring set of factors needed for successful operation and growth of CoPs. This draft will present the success factors most relevant to the ACT CoPs and will suggest how the toolkit can address these CoPs needs. The most recurring factors in the conducted short literature review have been grouped in Table 2.

| SUCCESS FACTOR | AUTHORS | TOOLS |
|---|---|---|
| ***Community interaction*** | Akhavan, Marzieh and Mirjafari, 2015;<br>Fontainha and Gannon-Leary, 2008;<br>Jagasia, Baul and Mallik, 2015;<br>Martos, 2012;<br>McDermott, 2002 (in Cambridge et al., 2005);<br>Probst and Borzillo, 2008;<br>Pyrko; Dörfler and Eden 2017; | World Café<br>Four Quadrants Activity<br>Brainstorming<br>1-2-4-All<br>Nine Whys |
| ***Sharing best practice*** | Hong, 2017;<br>Probst and Borzillo, 2008;<br>Retna and Ng, 2011; | 1-2-4-All<br>Mentoring Circles<br>Interviews<br>Fish Bowl |
| ***Supporting tools and resources*** | Akhavan, Marzieh and Mirjafari, 2015;<br>Fontainha and Gannon-Leary, 2008;<br>Hong, 2017; | What I Need from You<br>Storyboards |
| ***Mutual culture, values, belonging*** | Fontainha and Gannon-Leary, 2008;<br>Martos, 2012;<br>Pyrko; Dörfler and Eden 2017;<br>Retna and Ng, 2011; | Future Workshop<br>Heart, Hand, Mind |
| ***Knowledge production and access to knowledge*** | Hong, 2017;<br>Martos, 2012;<br>Probst and Borzillo, 2008; | Mentoring Circles<br>World Café<br>Interviews<br>Focus Groups |
| ***Learning*** | Hong, 2017;<br>Martos, 2012;<br>Probst and Borzillo, 2008; | Mentoring Circles<br>Focus Groups |
| ***Leadership*** | Akhavan, Marzieh and Mirjafari, 2015;<br>Martos, 2012;<br>Retna and Ng, 2011; | What I Need From You<br>Interviews<br>Nine Whys |
| ***Illustrating results and performance*** | Hong, 2017;<br>Martos, 2012;<br>Probst and Borzillo, 2008; | W3: What, So What, What Now?<br>Fish Bowl<br>Plan of Change |
| ***Strategy*** | Akhavan, Marzieh and Mirjafari, 2015;<br>Hong, 2017;<br>Probst and Borzillo, 2008; | SMART Criteria<br>Critical Uncertainties<br>Brainstorming<br>Mature Your Ideas |

**Table 2. CoP Success Factors Review**

This review will be used as part of the learning material available in the toolkit for community members to develop their knowledge about CoPs.

## 4.1 COMMUNITY INTERACTION

Community support and people factors (Jagasia, Baul and Mallik, 2015), engagement and participation in the community (Martos, 2012), regular interaction and communication (Fontainha and Gannon-Leary, 2008) and mutual engagement and regularity of interaction (Pyrko, Dörfler and Eden 2017) are all linked to the social actors engaged within the CoP and their mutual relations.

*Community interaction* and communication between the CoP members is therefore being identified as a crucial element of success of any CoP. Communication is also defined as fundamental for the development of the community and is most easily made possible by face-to-face interaction (Fontainha and Gannon-Leary, 2008). Jagasia, Baul and Mallik (2015) as well identify communication as a success factor of CoPs and suggest supporting the communication between CoP members with the help of a facilitator. They also state that successful CoPs facilitate communication by e.g. providing communication channels. Akhavan, Marzieh and Mirjafari (2015) identified the optimization of interaction as a success factor of a CoP, which underlines what has already been determined. If communication and interaction is being facilitated, knowledge can be shared more easily, and it leads to more dedication and commitment of the CoP members. Probst and Borzillo (2008) argue similar to Jagasia, Baul and Mallik (2015) and emphasise the importance of providing communication channels and supporting the interaction between CoP members. If there is a lack of interaction, this will result in less commitment and enthusiasm for the CoP and its objectives.

The central argument of the paper written by Pyrko, Dörfler and Eden (2017) about the success factors of CoPs is “thinking together” which is according to the authors, one of the key elements of the success of a CoP that facilitates the cultivation of such. Hong (2017) argues in a similar way as he states that building regular contacts is a very important aspect for a CoP to be successful. Communication, interaction and thinking together can be summarised into one concluding remark: All of those aspects are essential for the success of a CoP because they enable commitment, knowledge sharing and a sense of belonging, but communication and interaction needs support from time to time.

## 4.2 SHARING BEST PRACTICE

*Sharing best practice* leads not only to the development of a successful CoP but also an economic benefit. Probst and Borzillo (2008) state that sharing best practices between CoP members will result in saving resources like time and money. In consequence, this results in a more active participation of the CoP members, as they notice and experience the benefits of using best practices. Retna and Ng (2011) discuss that CoPs consist of different domains of knowledge. The success of a CoP is based on the fact that those domains are dynamic and strategic which means that they exchange their knowledge among each other. This exchange leads to more effectiveness that one single domain alone could have. Hong (2017) determines furthermore that the sharing of knowledge results in personal learning and identifying experts as well as developing best practices.

## 4.3 SUPPORTING TOOLS AND RESOURCES

*Supporting tools and resources* are identified as a factor of success of CoPs by various researchers / authors. Akhavan, Marzieh and Mirjafari (2015) found out that the provision of infrastructure and supporting tools for knowledge creation, communication and forming a CoP is an important part of the success in sharing knowledge in a CoP. The provision of technology and the ability of the CoP members to use it is also one central aspect in the paper written by Fontainha and Gannon-Leary (2008). They explain that (especially for virtual CoPs) technology facilitates communication. This again is one factor without a CoP cannot succeed over time (Fontainha and Gannon-Leary, 2008). Hong as well points out the importance of providing the necessary infrastructure and support. This could be IT support, communication tools but also just having the infrastructure to get together, meet and interact. He is hereby referring to McDermott (2002, cited in Cambridge et al., 2005) who points out that communication tools can be used to share knowledge (Hong, 2017). He continues to emphasise the importance of strategic support of IT. The use of communication tools and other IT support is especially helpful if it is not possible for the CoP members to meet regularly or in case of virtual CoPs (Fontainha and Gannon-Leary, 2008). In this case communication can be facilitated by those communication tools.

## 4.4 MUTUAL CULTURE, VALUES, BELONGING

*Mutual culture, values, belonging* – as obvious as it might seem – forms a big part of the success or failure of a CoP. Retna and Ng (2011) state that a shared culture or a shared vision leads to more interest and commitment to their domain and CoP. Pyrko, Dörfler and Eden (2017) whose most important aspect of a CoP is thinking together explain that it is necessary to think together in order to have mutual engagement. Mutual engagement again enacts "belonging" which is essential for CoP members to commit, engage and participate in general. They furthermore discuss the role of mutual identification which is also a result of thinking together and working towards the same objective. Trust, common values, shared understanding, sense of belonging and cultural awareness are success factors named by Fontainha and Gannon-Leary. All of those factors determine and influence the level of commitment and how much one invests in the CoP (Fontainha and Gannon-Leary, 2008). Sanz Martos (2012) leans in a very similar direction as she states that a CoP needs to create a new and its own culture as well as values. She furthermore explains the importance of building a sense of belonging in the members of the community. As explained before those aspects ultimately lead to a higher commitment of the CoP members as well as a deepened identification of them with their CoP. Those aspects are also part of Fontainha and Gannon-Leary's (2008) argumentation. Besides common values and a shared understanding, they argue that trust between the CoP members is also an important aspect for a CoP being successful. They also talk about a sense of belonging being beneficial for the success and health of a CoP.

## 4.5 KNOWLEDGE PRODUCTION AND ACCESS TO KNOWLEDGE

*Knowledge production and access to knowledge* is being discussed by Probst and Borzillo (2008). Their research showed that it is helpful for CoPs to import knowledge from outside. One of the findings of their research suggests importing knowledge from experts outside the CoP. They can be from different institutions, organizations as well as various positions (e.g. researchers or practitioners). If those experts are being invited to CoP meetings, they share ideas, experience, knowledge best practices and insights. This means that CoP members get access to knowledge and can produce knowledge as well as they get access to new approaches and can advance their existing best practices. In summary, external experts provide new ideas, new perspectives and knowledge. In those meetings CoPs get access to their knowledge and their expertise. Furthermore, they point out the role of promoting access to other networks. By stepping over their boundaries, CoP members get access to other people working on the same problem and experts. Contact with people outside the CoP and in other networks have the same effects as mentioned above: Not only opens this access to knowledge but by sharing and exchanging knowledge, ideas and experiences new knowledge is being produced (Probst and Borzillo, 2008). Hong as well emphasises the role of knowledge and identifies knowledge and understanding the value of knowledge as a success factor for CoPs (Hong, 2017).

## 4.6 LEARNING

One important aspect for being a successful CoP is to keep on *learning* and include new knowledge, findings and perspectives. One way to make sure to gain new perspectives and knowledge is to always open up to and include external expertise. By joining regular meetings or ad hoc meetings of the CoP they share their ideas, experience, insights and knowledge which keeps the learning process going as input from external experts trigger new ways of thinking or looking at a problem. To get access to new knowledge and therefore keep on learning does not mean that only external experts can set new courses. Learning can also happen if knowledge is being exchanged in the same organization if access to intra-organisational networks is being promoted and facilitated CoP members can learn from other colleagues and experts (Probst and Borzillo, 2008). This success factor is intimately connected with the success factor of “knowledge production and access to knowledge”. It is often being discussed that successful CoPs need a culture for sharing and creating knowledge (Lave and Wenger, 1991). A strategy to achieve this is to construct a learning organization. This aspect implies the importance of learning for the success of a CoP. Knowledge sharing leads not only to learning processes in a CoP but also on an individual level and thus to identifying new experts (Hong, 2013).

## 4.7 LEADERSHIP

*Leadership* is an aspect of CoPs closely connected to other success factors such as mutual culture and supporting tools and resources. According to Retna and Ng (2011) Leadership contributes to creating and maintaining culture or values. It is also part of the responsibilities of a leader to provide the infrastructure and support needed e.g. providing premises (ibid.). It is also fruitful seeing that the leader (let us say the CEO of a company) is committed to the CoP as well. This is inspiring employees to follow this example. Furthermore, if the CEO or the leader is invested in the CoP, he / she is more willing to provide resources and give its employees time to invest in the CoP. Leaders are a very important part of facilitating a culture of learning and sharing (Retna and Ng, 2011). Interaction as another success factor is connected to leadership, too. Similar like the arguments of Retna and Ng, Akhavan, Marzieh and Mirjafari (2015) recognise the importance of leadership support. They argue that a supportive leadership leads to optimised interactions. This shows exemplarily that the different success factors are often interlinked among each other. Hong (2017) as well argues that if the CEO or leader advocates and supports the Cultivation of CoPs, they are more likely to be fruitful and successful. This leads to another aspect of leadership that Hong (2017) discusses: When leaders cultivate CoPs as an integral part of the company, they contribute to the success of the company.

## 4.8 ILLUSTRATING RESULTS AND PERFORMANCE

*Illustrating results and performance* aims to have an impact on the motivation of the CoP members. The idea is that CoP members can post their experiences in some sort of reporting system and talk about the process, implementation and results. This should not only have an impact on the motivation of CoP members as such but to motivate them to participate by showing that their efforts do have a real impact on their organization or company (Probst and Borzillo, 2008). In this context, it can also be helpful to evaluate the performance of CoPs. Such evaluations lead to more effectiveness and motivation by showing the strengths and weaknesses of the performance. This leads to more effort to improve if the performance has weaknesses or serves as a push and further motivation if the performance already is strong (Hong, 2017).

## 4.9 STRATEGY

*Strategy* and long-term goals are discussed as further success factors by Akhavan, Marzieh and Mirjafari (2015). By providing programmes and policies, organizations or institutions can support the motivation and willingness to create and share knowledge. Strategies have to be clear and understandable to motivate people to participate in a CoP. According to their research, having a strategy and specific goals has the highest impact on CoPs.

# 5. COP LIFECYCLE PHASES

As proposed by McDermott (2002, cited in Cambridge et al., 2005) CoPs have lifecycles and they begin, grow, and have life spans. Specific design, facilitation, and support strategies exist to help reach the goals of the CoP during each lifecycle phase and elevate it into the next stage of development. If the CoP is successful, the energy, commitment, and visibility of the CoP will grow until the CoP becomes institutionalized as a core value-added capability of the sponsoring organization (Cambridge et al., 2005: 2). The different development stages are inquire, design, prototype, launch, grow and sustain. They will be briefly described in turn (see Figure 4).

**Inquire** is the phase in which through a process of exploration and inquiry the audience, the goals and the vision for the CoP will be determined.

This phase is followed by **design** which implies the definition of activities, processes and different roles that support the goals of the community.

After those aspects are defined the community is ready to take the first step. In the **prototype** phase commitment is gained, strategies are being refined, assumptions are tested, and a success story is established.

The **launch** phase can then happen if everything is set and the community can present itself to a broad audience and engage more actors over a period of time.

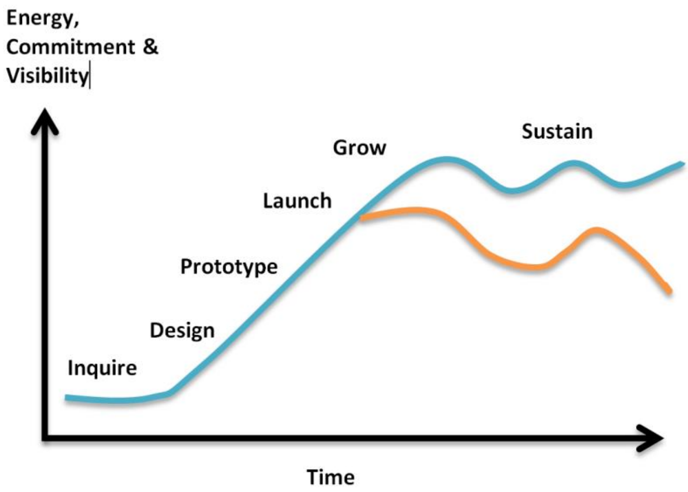



**Figure 4. CoP Lifecycle Phases. Adapted from Cambridge et al., 2005.**

Once established the community starts to **grow** by engaging more members, participating in events and reaching the first goals. The main characteristics are learning collaboratively, sharing knowledge, engaging in group projects and networking events, while creating an increasing cycle of participation and contribution.

To make sure that the community survives and keeps on going it is important to strengthen the community by assessing what they achieved. In the **sustain** phase new goals are being set and new strategies developed.

Each CoP lifecycle phase requires a different set of activities and methods, which are suggested in Table 3.

| LIFECYCLE PHASE | Inquire | Design | Prototype | Launch | Grow | Sustain |
|---|---|---|---|---|---|---|
| ***TOOLS*** | 1-2-4-All<br>SMART<br>Brainstorming<br>Focus Groups<br>Future Workshop<br>Hart, Hand, Mind<br>Interviews<br>Mature Your Ideas<br>Nine Whys<br>PESTEL<br>SWOT<br>What I Need From You | Critical Uncertainties<br>Future Workshop<br>Nine Whys<br>Storyboards<br>What I Need From You | SMART<br>Critical Uncertainties<br>Futures Workshop<br>Plan of Change | Fish Bowl<br>The World Café | Infographics<br>Photo/Video Documentation<br>Storyboards<br>W3: What, So What, Now What | Infographics<br>Nine Whys<br>Photo/Video Doc.<br>W3: What, So What, Now What |

**Table 3. CoP Lifecycle Phases and Available Tools**

# 6. COPS' PRIMARY AREAS OF ACTIVITY

Cambridge et al. (2005) propose that beyond the above CoP lifecycles, each community is characterised by their unique goals, purpose and the members' characteristics and needs. Therefore, it is important that all social and technical design choices are primarily driven by purpose and the context of the CoP. Communities that succeed and last are characterised by focused and well-defined purposes that are linked to the strategic mission of the sponsoring organisation. The most effective way to define a CoP's purpose is to assess how this initiative will *benefit* the community's stakeholders and also what *specific needs* are to be met by the community.

CoP purposes are categorised into four areas of activity: building relationships, learning and developing practice, taking action as a community and creating knowledge in the domain.

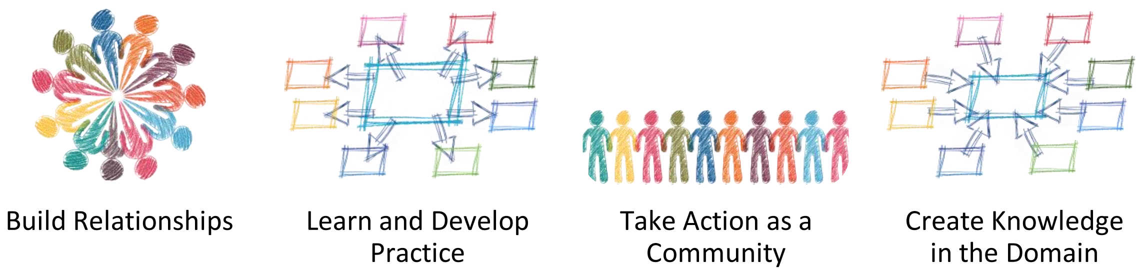



**Figure 5. CoPs' Primary Areas of Activity (Images by Gerd Altmann from Pixabay).**

## 6.1 BUILDING RELATIONSHIPS

This area of activity is built on the purpose of interacting with and developing a wider network of peers, and instilling commitment necessary for strong communities. This purpose might not be the end goal in itself for a CoP, but a means to an end. This is because community activities are contingent on a safe environment of mutual trust, respect, openness, and listening, which is needed if we want to encourage idea sharing, exposing one's ignorance, and asking challenging questions.

The toolkit should encourage a **continuity** and **depth** of **interactions** between members. Therefore, the participative methods should be enjoyable, attractive, fulfilling and rewarding. Moreover, it should help to develop a **shared understanding** of the community's **domain** and **approach** to **practice**.

Suggested activities include Four Quadrants, Interviews, What I Need From You?

## 6.2 LEARNING AND DEVELOPING PRACTICE

The purpose of learning and developing a shared practice, based on an existing body of knowledge underscores this area of activity. The community helps to evolve the practice as a collective product, which becomes integral to members' work and is reflective of their perspectives. It is important to balance the production of documents and tools through practice and deep learning experiences for community members.

The toolkit should facilitate **accessing** the community's knowledge representations for existing practice, and supporting **deeper learning and knowledge sharing** for community members.

Suggested activities include 1-2-4-All, Brainstorming, Focus Groups, Heart, Hand, Mind, Interviews, Mature Your ideas, Mentoring Circle, Storyboards, The World Café.

## 6.3 TAKING ACTION AS A COMMUNITY

This area of activity is built on the purpose of making things happen through tasks and projects. For example, establishing small group projects could help members create close relationships and also design and pool the resources for practice development and knowledge generation.

The toolkit should facilitate **collaborative efforts**, and **working with others**, but also **recognising** and **rewarding members** for their contributions.

Suggested activities include SMART Criteria, Critical Uncertainties (Theory of Change), Plan of Change (Theory of Change), W3: What, So What, Now What.

## 6.4 CREATING KNOWLEDGE IN THE DOMAIN

This area of activity fulfils the purpose of generating and discovering new knowledge. It concerns members going beyond what is currently practiced and exploring the cutting edge of the domain in order to innovate. Fulfilling this purpose may necessitate redefining the CoP's boundaries and membership to facilitate boundary crossing and engaging with external communities to explore new ideas and practices.

The toolkit should help a **cross pollination** of **ideas** and **spreading** leading-edge **knowledge**, outside engagement.

Suggested activities include Fish Bowl, Infographics, Mentoring Circles, Photo/Video Documentation, Storyboards.

| ***Building relationships*** | ***Learning and developing practice*** | ***Taking action as a community*** | ***Creating knowledge*** |
|---|---|---|---|
| Four Quadrants<br>Interviews<br>What I Need From You? | 1-2-4-All<br>Brainstorming<br>Focus Groups<br>Heart, Hand, Mind<br>Interviews<br>Mature Your ideas<br>Mentoring Circle<br>Storyboards<br>The World Café | SMART Criteria<br>Critical Uncertainties<br>Plan of Change<br>W3: What, So What, Now What | Fish bowl<br>Infographics<br>Mentoring Circles<br>Photo/Video Documentation<br>Storyboards |

**Table 4. CoPs' Four Primary Areas of Activity and Available Tools**

# 7. PARTICIPATORY METHODS & THE QUICK GUIDE[5]

*What:* Participatory methods include various activities and tools which all have the same goal: to facilitate that everyone can take over an active and influential part in decision-making, planning and implementation. They aim at making sure that everyone can share his or her opinion, which is really being heard and to influence the outcome or future activities in their organisation. Most important to keep in mind is actively involving people in decision-making that do not belong to the actual circle of decision-makers of an organisation. Depending on the context this could mean involving average citizens in e.g. policy processes or co-workers in a project. Participatory methods are valuable because they take into account the worth of knowledge and experience exchange which is one aim of this toolkit: promoting knowledge and experience exchange between CoP members and across CoPs by facilitating their communication, participation and exchange.

*Who:* Participatory methods are a great tool if one wishes to play a more active role and to be more involved, as well as if one wants to include people e.g. from other departments. Sometimes participatory methods are the chosen approach if new input is needed because the organisation, project or idea got stuck at one point or if further information is missing. Furthermore, participatory methods can be helpful to benefit from actively engaging diverse perspectives in decision-making or project planning processes. Participatory methods therefore are a helpful tool for CoPs who plan activities or measures on enhancing gender equality.

*Why:* The answer why one should use participatory methods can be tackled from different sides. Firstly, the demand for more participation rose in different areas like companies, institutions or policy-making. Secondly, the benefits of participation of different actors or stakeholders in decision-making processes are well known. The benefits of increasing participation vary from an improvement of the quality of decisions, satisfaction of the demand for more participation as well as the inclusion of diverse perspectives. When addressing an issue or problem as much knowledge, experience and insight as possible regarding the issue or problem is always supporting. To get access to this knowledge and those insights it is fundamental to facilitate the participation of everyone who can contribute to finding solutions and planning the future.

*When:* Participatory methods can be used at all stages of a project or process. But they are also useful as tools for strengthening engagement, holding the powerful to account, to get new ideas and input as well as strengthening and ensuring greater commitment on the part of all those involved. They also support learning processes as well as knowledge exchange in case there is more expertise and know-how needed. They also lay the foundation for a decision to be accepted and understood at the end.

This section provides the categorisation of the methods as a quick reference guide, detailed content of the toolkit, descriptions of the activities with activity templates, and online adaptations. Each activity will be linked to a particular primary area of activity, a lifecycle stage, and a success factor if relevant. This toolkit and especially the participatory methods aim to

[5] Adapted from Slocum, N. (2003), *Participatory methods toolkit. A practitioner's manual*.

support the CoPs in knowledge exchange, getting new input, strengthening engagement of the CoP members etc.

| QUICK GUIDE Participatory Methods | For what | Group size | Face-to-face / Online | Page |
|---|---|---|---|---|
| 1-2-4-ALL | EIGE Step 1: Getting started<br>CoP success factors: Community interaction; Sharing best practice<br>Lifecycle phase: Inquire<br>Four primary areas of activity: Learning and developing practice | Unlimited | Face-to-face | 29 |
| BRAINSTORMING | EIGE Step 1: Getting started<br>CoP success factors: Community interaction; Strategy<br>Four primary areas of activity: Learning and developing practice | 3-6 per group | Face-to-face / Online | 32 |
| CRITICAL UNCERTAINTIES (THEORY OF CHANGE) | EIGE Step 3: Setting up a GEP<br>EIGE Step 4: Implementing a GEP<br>CoP success factors: Strategy<br>Four primary areas of activity: Taking action as a community | Four groups with 4-6 people each | Face-to-face | 36 |
| FISH BOWL | EIGE Step 4: Implementing a GEP<br>EIGE Step 5: Monitoring progress and evaluating a GEP<br>CoP success factors: Sharing best practice; Illustrating results and performance<br>Lifecycle phase: Launch<br>Four primary areas of activity: Creating knowledge | Unlimited | Face-to-face / Online | 40 |
| FOCUS GROUPS | EIGE Step 5: Monitoring progress and evaluating a GEP<br>CoP success factors: knowledge production & access to knowledge; Learning<br>Lifecycle phase: Inquire<br>Four primary areas of activity: Learning and developing practice | Up to 12 per Focus group | Face-to-face / Online | 42 |
| FOUR QUADRANTS | EIGE Step 1: Getting started<br>CoP success factors: Community interaction<br>Primary areas of activity: Building relationships | Unlimited number of groups, 4 people per group | Face-to-face / Online | 44 |
| FUTURE WORKSHOP | EIGE Step 1: Getting started<br>EIGE Step 6: What comes after the GEP<br>Cop success factors: Mutual culture and belonging<br>Lifecycle phase: Inquire; Design | 20-30 | Face-to-face | 47 |

| | | | | |
|---|---|---|---|---|
| HEART, HAND, MIND | CoP success factors: Mutual culture and belonging<br>Four primary areas of activity: Learning and developing practice | 5-15 | Face-to-face | 50 |
| INFOGRAPHICS | EIGE Step 6: What comes after the GEP<br>Lifecycle phase: Grow; Sustain<br>Four primary areas of activity: Creating knowledge | N/A | Face-to-face / Online | 83 |
| INTERVIEWS | EIGE Step 2: Analysing and assessing the state-of-play in the institution<br>CoP success factors: Sharing best practice; knowledge production and access to knowledge; Leadership<br>Lifecycle phase: Inquire<br>Four primary areas of activity: Building relationships; Learning and developing practice | 5-8 people from the target audience | Face-to-face / Online | 53 |
| MATURE YOUR IDEAS | EIGE Step 1: Getting started<br>EIGE Step 2: Analysing and assessing the state-of-play in the institution<br>CoP success factors: Strategy<br>Lifecycle phase: Inquire<br>Four primary areas of activity: Learning and developing practice | 3-6 per group | Face-to-face | 56 |
| MENTORING CIRCLES | CoP success factors: Sharing best practice<br>Four primary areas of activity: Learning and developing practice; Creating knowledge | 6-8 people per mentoring circle | Face-to-face / Online | 58 |
| NINE WHYS | EIGE Step 1: Getting started<br>EIGE Step 6: What comes after the GEP<br>CoP success factors: Community interaction; Leadership<br>Lifecycle phase: Inquire; Design; Sustain | Unlimited | Face-to-face | 60 |
| PHOTO / VIDEO DOCUMENTATION | EIGE Step 5: Monitoring progress and evaluating a GEP<br>Lifecycle phase: Grow<br>Four primary areas of activity: Creating knowledge | N/A | N/A | 85 |
| PLAN OF CHANGE (THEORY OF CHANGE) | EIGE Step 3: Setting up a GEP<br>EIGE Step 4: Implementing a GEP<br>EIGE Step 5: Monitoring progress and evaluating a GEP<br>CoP success factors: Illustrating results and performance<br>Lifecycle phase: Prototype<br>Four primary areas of activity: Taking action as a community | 8-25 | Face-to-face | 63 |

| | | | | |
|---|---|---|---|---|
| SMART CRITERIA / GOALS | EIGE Step 3: Setting up a GEP<br>CoP success factors: Strategy<br>Lifecycle phase: Inquire; Prototype<br>Four primary areas of activity: Taking action as a community | Alone or in small groups (2-8) | Face-to-face / Online | 67 |
| STORYBOARDS | EIGE Step 2: Analysing and assessing the state-of-play in the institution<br>EIGE Step 4: Implementing a GEP<br>CoP success factors: Supporting tools and resources<br>Lifecycle phase: Design; Grow<br>Four primary areas of activity: Learning and developing practice, Creating knowledge | Unlimited | Face-to-face / Online | 89 |
| SWOT AND PESTEL | EIGE Step 1: Getting started (SWOT)<br>EIGE Step 2: Analysing and assessing the state-of-play in the institution (PESTEL)<br>Lifecycle phase: Inquire | 8-12 people | Face-to-face / Online | 71 |
| W3: WHAT, SO WHAT, NOW WHAT | EIGE Step 6: What comes after the GEP<br>CoP success factors: Illustrating result and performance<br>Lifecycle phase: Grow; Sustain<br>Four primary areas of activity: Taking action as a community | Unlimited number of groups, 5-7 people per group | Face-to-face | 76 |
| WHAT I NEED FROM YOU | EIGE Step 2: Analysing and assessing the state-of-play in the institution<br>CoP success factors: Supporting tools and resources; Leadership<br>Lifecycle phase: Inquire; Design<br>Four primary areas of activity: Building relationships | 3-7 functional clusters. The size of the clusters is not limited | Face-to-face | 79 |
| THE WORLD CAFÉ | EIGE Step 4: Implementing a GEP<br>CoP success factors: Community interaction; Knowledge production and access to knowledge<br>Lifecycle phase: Launch<br>Four primary areas of activity: Learning and developing practice | Large groups (12 people or more) | Face-to-face | 81 |

## 7.1 1-2-4-ALL[6]

1. Short description

The 1-2-4-All activity engages every individual in searching for answers. The size of the group is not important for this activity. The knowledge and imagination that exists in unknown places can be explored.

2. When to use

This method is especially helpful to generate new ideas but also to build consensus. By exchanging knowledge and information between various people more knowledge can be generated and new perspectives on an issue come up and help finding different approaches and solutions to tackle a problem.

3. How to

**A: Brief explanation**

This method is based on an issue that is presented in the beginning of the meeting / conference etc. Then, everyone takes some time to write his or her ideas / thoughts down. In pairs (or small groups, depending on the size of the group) the ideas are being shared. In this conversation they may find some mutual themes, new ideas emerging from the conversation, or their ideas may fit together in a synergy. Each pair then joins another pair to discuss the ideas and learning in a group of four. Next, all participants return to a discussion in the whole group.

**B: Detailed step-by-step guide**

1-2-4-All starts off by asking a question related to the presentation of a problem/issue, or a proposal/plan/project that has been suggested. There is no limit on how many groups can form part of this activity. What is important is to have enough room for all the participants to pair up. The ideas and insights of the participants can be recorded on paper. Everyone can participate and is equally expected/invited to contribute.

When starting this activity, everyone works alone. Later on, they pair up, join another pair and in the end the whole group works together.

The process of the activity can be described as follows: Each participant starts out by reflecting quietly on a shared experience, challenge or task. This reflection is based on a question like: What ways and possibilities do YOU identify/have in mind to support making progress regarding the broached issue? What ideas do you have? The next step is to develop and discuss ideas in pairs on the basis on what each participant has been working on in the self-reflection phase. Those ideas will be shared and further developed in groups of four (two pairs). The activity finishes in asking which was the most prominent idea discussed? Every

[6] Adapted from Liberating Structures, http://www.liberatingstructures.com/1-1-2-4-all/.

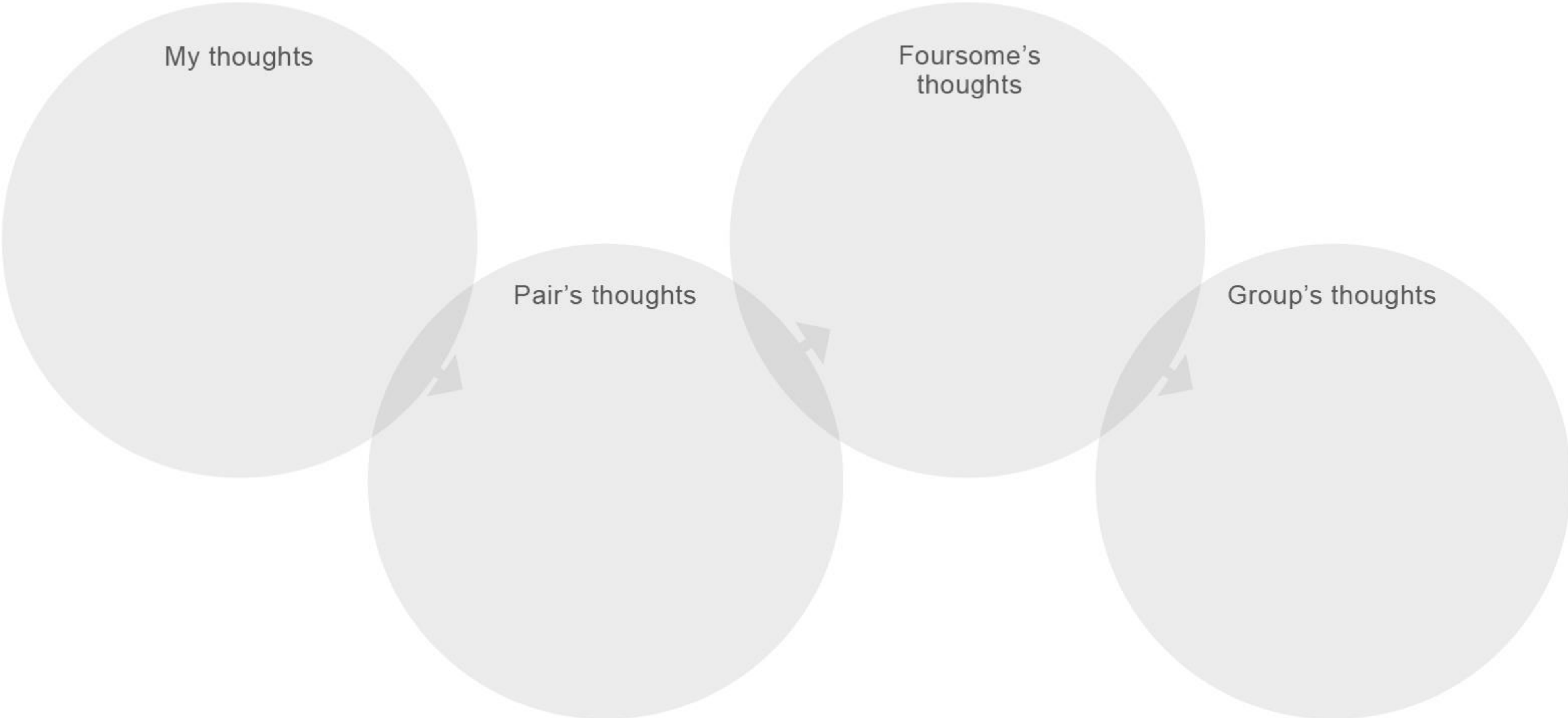
group presents the idea that they find is the most important. This cycle can be repeated if necessary.

4. Additional ideas / information:

- If the group is very large it might help limiting the number of the ideas that are being shared
- Each group should share one insight. It should not be something that has already been said
- Video discussing the advantages https://vimeo.com/93869810

5. Visualisation and template:

# 1-2-4 ALL


My thoughts
Pair's thoughts
Foursome's thoughts
Group's thoughts

## 7.2 BRAINSTORMING[7]

1. Short Description

Brainstorming sessions can take many different forms, however here we adopt a method to use standardised templates to be filled out by participants answering one or several rounds to given challenges. Facilitators lead the grouping of ideas, which in a second step, can be matured (see Mature Your Ideas).

With these two types of brainstorming activities, you will systematically, simply and effectively transform questions and challenges into ideas. Here, there are examples of two different approaches: the open and the closed brainstorming. In both options, you can benefit from putting together a team with different professional competencies to get as many different ideas as possible.

2. When to use this method?

You can use this method when you want not only to share knowledge about a subject but also deepen it with getting the opportunity to provide specific ideas. Brainstorming facilitates a relaxed environment that inspires everyone to participate. You should encourage even eccentric ideas so that they can be further developed by others, and all participants should be stimulated to contribute as much as possible. This will help you to co-create a comprehensive set of solutions and ideas.

When used during problem solving, brainstorming brings the participants' diverse experience together. It increases the diversity of ideas explored, so that better solutions to the problems can be found. Brainstorming can help participants to bond, as they are part of a group solving problems or suggesting ideas in a safe environment.

3. How to use this method?

**A. Brief explanation**

There are two types of Brainstorm suggested in this toolkit: open and closed. The intuitive method elicits ideas from a group verbally and openly. The closed one allows more introvert, quieter or shyer individuals to equally participate, as the brainstorm is done in silence.

**B. Detailed step-by-step guide**

### 7.2.1 THE OPEN BRAINSTORM

- A group of 3-6 people receive a development question that they must generate ideas from. The challenge is either pre-defined or will be defined together with the participants. The development question should be written on a post-it note and put in the middle of the poster (template provided).
- The group generates ideas on the question for about five minutes and then places eight ideas in the areas around the challenge. The ideas should be written on post-it notes in a different colour.

ADAPTABLE ONLINE

[7] Text and templates adapted from www.mind-lab.dk

- This brainstorm is adaptable online. Instead of physical sheets and post-it notes, you could create a shared document which the participants can contribute to. Alternatively, one person who acts as the facilitator collects all ideas either verbally one-by-one or asks the participants to send them a private message via the online conference/meeting software to collect anonymous contributions. If the issue is controversial, this may encourage honesty and ideas even from the more introvert or shy personalities.
- Depending on the software you use for online meetings, there might be co-creation options facilitating co-design in real time.

### 7.2.2 THE CLOSED BRAINSTORM[8]

This variant of brainstorming is effective for generating and developing ideas whilst relying on an iterative process of building on consecutive contributions by each person. This brainstorm is not adaptable online, as multiple sheets change hands throughout the activity.

- Write a development question on a post-it note and stick onto each sheet and give each participant post-it notes in a different colour.
- Place the participants around a table so that they can exchange notes with their neighbour.
- Now, each participant writes solution ideas down on their post-it notes (in silence) and places them on the column of the round, they have reached.
- Once they finished contributing, the person sitting on the right builds on this by offering a developed contribution to this idea. Working clockwise around the circle, each participant writes a single idea - ideally one which has not yet been mentioned - until a full circle has been completed – this is round one.
- Participants pass on the sheet to the person sitting to the right of them, when the allocated time for idea generation ends.
- The second round starts a new idea, which is then built upon as in Round 1. If preferred, you could only conduct one round, rather than three. It depends on how much time is available.
- As the ideas are added, the amount of time has been increased, because it might be more difficult to continue coming up with new ideas.
- The timings here are optional, and with three rounds in total it will take 36 minutes to conduct this closed brainstorm. If you have a more complex question or issue, it is possible to increase the timings accordingly, for example, 2 min x 2, 4 min x 2, 6 min x 2. If you have less time, and the question is simple, you can also reduce the time available. It all depends on the time you have.

[8] Adapted from https://www.betterevaluation.org/en/evaluation-options/roundrobin and www.mind-lab.dk.

4. Additional ideas / information

This type of brainstorming is based on Round Robin brainstorming and has the benefit of eliciting ideas from participants that tend to remain silent. It provides each person an equal chance to voice their thoughts to suggest their ideas without any pressure.

5. Templates

The brainstorming templates are most effective printed on A3-sized paper so that standard square post-it notes fit into the grid.

**DEVELOPMENT QUESTION**
(post-it note)

# THE CLOSED BRAINSTORM

| DEVELOPMENT QUESTION (post-it note) | ROUND 1 | ROUND 2 | ROUND 3 |
|---|---|---|---|
| PERSON 1 (1 min) | | | |
| PERSON 2 (1 min) | | | |
| PERSON 3 (2 min) | | | |
| PERSON 4 (2 min) | | | |
| PERSON 5 (3 min) | | | |
| PERSON 6 (3 min) | | | |

## 7.3 CRITICAL UNCERTAINTIES (THEORY OF CHANGE)[9]

1. <u>Short description</u>

*Critical Uncertainties* is another method based on the theory of change that can help a diverse group to see if their course of action/approach is feasible and practical. It also supports getting better in responding to challenges that might wait in the future. This enables a group to develop a strategy. The aim of this activity is not to elaborate an implementation plan. It is more about being able to respond to unforeseen events and changes. This includes being able to see the different ways in which future can evolve.

2. <u>When to use</u>

*Critical Uncertainties* helps to see if current strategies are viable and practical. This is being facilitated when uncertainties are being defined and recognized. The overall goal is to make sure that everyone is able to adapt in case of an uncertainty as well as setting priorities. Finally, this method should help to build up confidence in managing the unforeseeable future.

3. <u>How to</u>

**A: Brief explanation**

The participants of this activity think of the most fatal uncertainty they might face / actually face in their organization/ project which might prevent them to work successfully. In small groups strategies are being developed to help to avoid those uncertainties or to prepare coping strategies and mechanisms for such a situation.

**B: Detailed step-by-step guide**

1. The participants are asked to identify and describe the most critical uncertainty in their organisation / project. After that, they are encouraged to think of strategies that would help them to work successfully in a moment of uncertainty.

2. The participants work in four groups, the size of the groups is not limited per se. Paper, post-its, flipcharts etc. should be provided for each group.

3. All the participants take responsibility for planning and executing a strategy and everyone has the chance to contribute.

4. The whole group needs to be big enough to divide it into four smaller groups. Those four groups develop four scenarios and strategies to this effect.

5. Process of the activity: The participants are asked to list uncertainties they face or which aspects seem out of their control. The question asked in this context could be “In your project/organisation, what factors seem to be difficult to foresee or control?”. The most critical factors are being prioritised by asking for those factors that threaten the ability to work successfully. The most critical two points as well as the two points that are the most uncertain are being selected. Then a grid with two axes—X & Y—with a “more of <— —> less of” continuum for each of the factors on each axis is being established. In doing so, four

[9] Adapted from Liberating Structures: http://www.liberatingstructures.com/30-critical-uncertainties/.

quadrants will originate. Each group names one of the quadrants and writes a short sketch/story/scenario about it. After that, the four groups present their scenarios (not too long). Each of the groups then thinks of three strategies that would be helpful to act successfully in the specific scenario. Those strategies are then being shared (not too long as well). In the end the whole group discusses to identify which strategies are the most practical and effective ones and which will probably not lead to success.

4. Additional ideas/ information

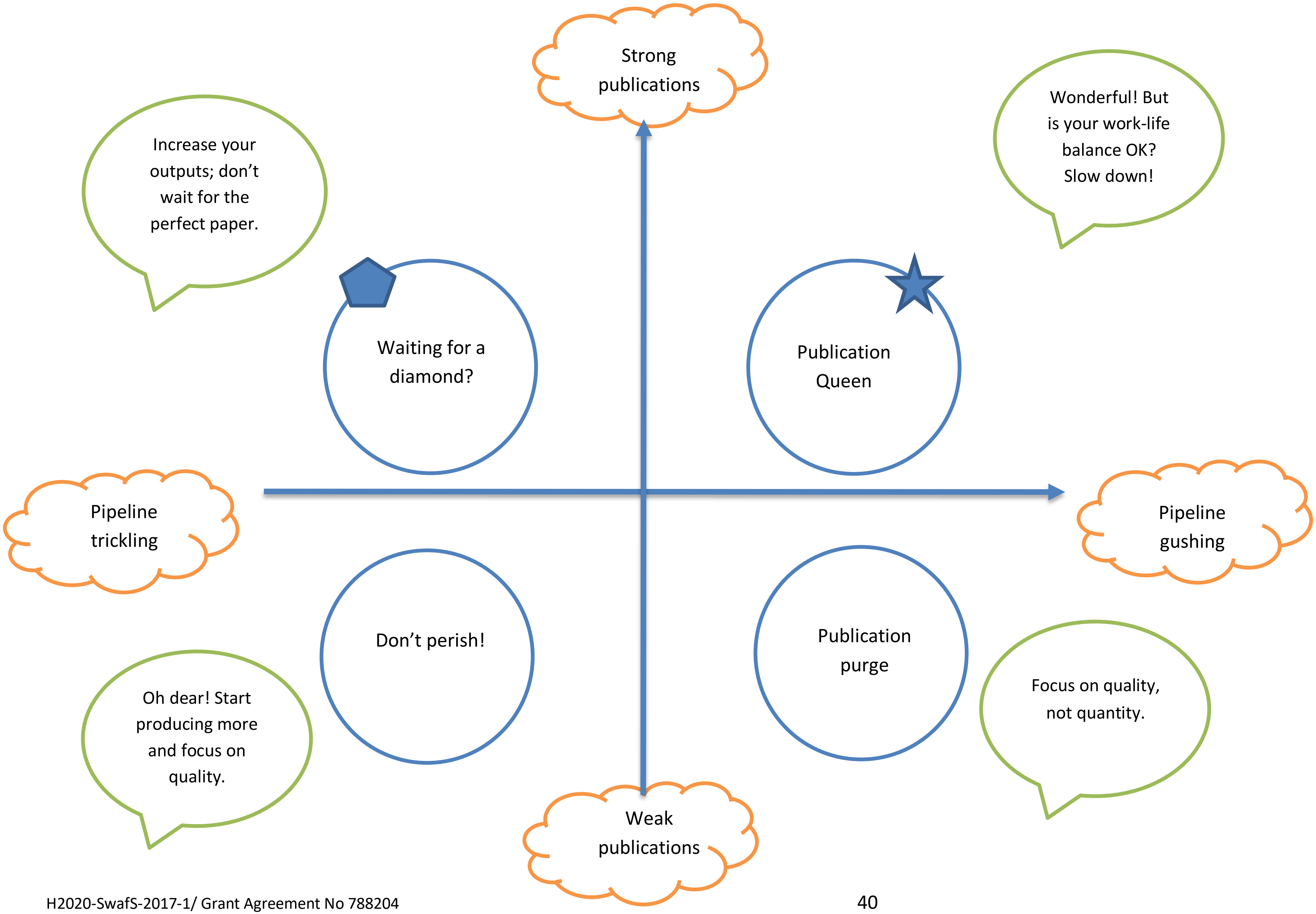
- When thinking about the different uncertainties, it helps to remind the group of moments/events/scenarios that they didn't expect and moments in which they weren't prepared

- Naming the quadrants can be a fun thing, e.g. using movie or book titles etc.

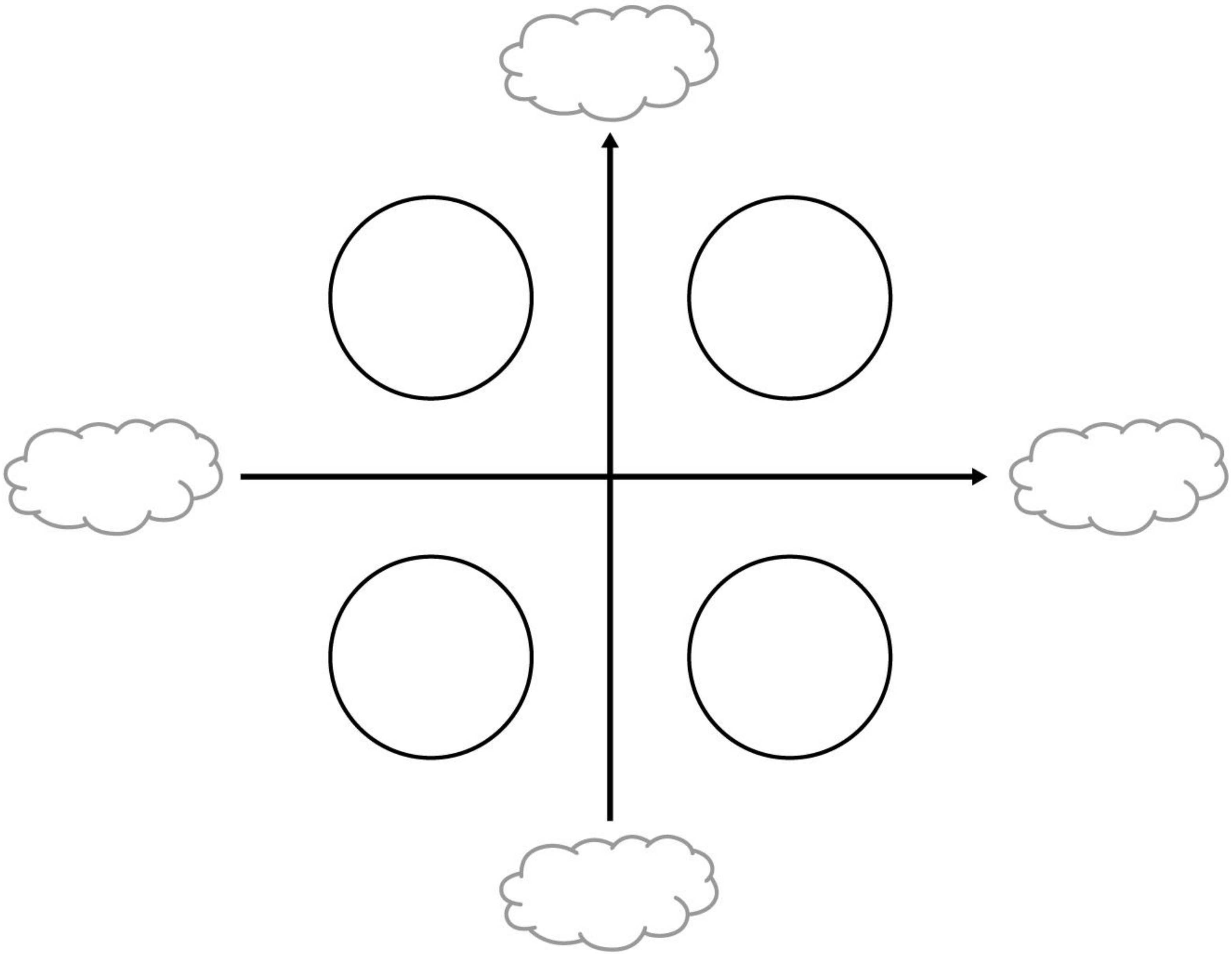
- Another idea is to write all the ideas down on Post-its so that they can be combined in different ways.

5. Example and Template

As researchers it is important for us to publish in highly regarded academic journals with a mantra known to many as “publish or perish”. We could identify two critical uncertainties, first, our publication submission acceptance on the scale of strong versus weak, and second, our pipeline of papers that we are currently producing as gushing or trickling. Now, think of strategies to help you in each quadrant – some examples are given.


Strong publications
Wonderful! But is your work-life balance OK? Slow down!
Increase your outputs; don't wait for the perfect paper.
Waiting for a diamond?
Publication Queen
Pipeline trickling
Pipeline gushing
Don't perish!
Publication purge
Oh dear! Start producing more and focus on quality.
Focus on quality, not quantity.
Weak publications

# CRITICAL UNCERTAINTIES



## 7.4 FISH BOWL[10]

1. Short description

*Fish Bowl* method is a dynamic alternative to classic discussion formats such as panel discussions. It includes small rounds of talks in major events and brings vitality as well as spontaneity in conventional activity and event formats.

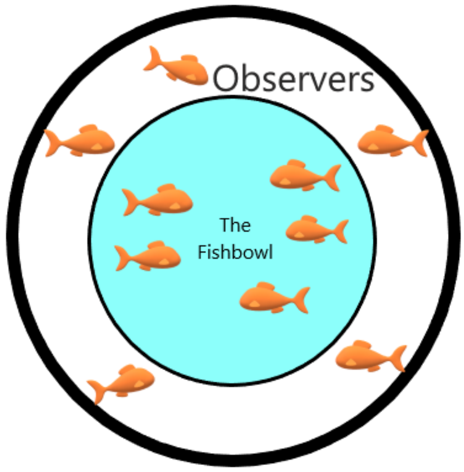
2. When to use

*Fish Bowl* is a helpful and supportive method for the presentation of group results and to dispute questions as well as open discussion processes. Partial interests can be represented not only in small but also in large groups. Everyone can participate and include their arguments, questions and suggestions.

3. How to

**A: Brief explanation**

*Fish Bowl* consists of two circles: The inner circle consists of 4 to 6 people (depending on the overall size of the group). One chair in the inner circle remains free and everyone from the outer circle can join. If someone of the inner circle doesn't want to participate anymore, one is free to leave the inner circle. Only people in the inner circle are allowed to talk whereas the rest of the group listens and can participate by moving into the inner circle.




**B: Detailed step-by-step guide**

A small circle of participants sits in a small circle of chairs in the middle of one or more, larger circles of chairs. Only the persons in the innermost circle are allowed to speak (in the form of a direct discussion). People from the outer circle(s) listen but can go into the inner circle at any time and join in the discussion. There are two variants here. 1) A chair is kept free for such cases or 2) one stands behind a chair and signals to those in the inner circle that one person has to free his place, which leads to a continuous change without disturbing the flow of discussion. This dynamic prevents a stagnation of the discussion. It is also helpful if one person in the inner circle moderates the discussion.

4. Additional ideas / information

- The question for discussion should be so open that it can lead in different directions.
- The discussion can be followed by a feedback round. With the help of a questionnaire or freely in the round, feedback on the course and the results of the discussion can now be presented.

[10] Adapted from Participation & Sustainable Development in Europe, https://www.partizipation.at/fishbowl-en.html.

- To adapt it to online communication, ask the participants to have a post-it note ready with the word “fishbowl” written on it, or an image of fish. Invite 3-5 volunteers to “join” the fishbowl, while the rest of the participants stay silent and listen as the observers. The participants within the fishbowl stick their post-its somewhere visible. Make sure that everyone within the fishbowl contributes to the discussion, and when the discussion begins to die down, invite one of the observes to join the fishbowl, and one volunteer to leave the fishbowl. The person who joins, needs to stick their post-it note somewhere visible to the rest now to indicate that they are within the fishbowl. The person who leaves the fishbowl needs to remove his or hers post-it.

  This may not happen as spontaneously as face-to-face, however facilitated well, it can prove to be a productive way to encourage the participants to speak. This activity becomes more effective with practice.

ADAPTABLE ONLINE

## 7.5 FOCUS GROUPS[11]

1. Short Description

A focus group is a planned discussion in a small group (four up to twelve people) of stakeholders facilitated by a moderator. Its aim is to obtain information about people's opinions, preferences and values relating to a topic and prompting why these are held. This is accomplished by monitoring the structured discussion of a group in a non-judgemental, non-threatening environment (Slocum, 2003).

2. When to use this method?

According to Slocum (2003: 97) you should use it when you want to:

- ✓ explore the nature and strength of stakeholders' concerns and values about the issues
- ✓ get a snapshot of public opinion when time constraints or finances do not allow a full review or survey
- ✓ obtain input from individuals as well as interest groups
- ✓ get detailed reaction and input from a stakeholder or client group to preliminary proposals or options
- ✓ collect information on the needs of stakeholders surrounding an issue or concept
- ✓ determine what additional information or modification may be needed to develop consultation issues or proposals further.

3. How to use this method?

**A. Brief explanation**

First, at least three organisers should determine the questions explored by the focus group. Next, they should select the participants and a moderator. During the event (usually lasting 2-3 hours), the moderator facilitates the group discussion through a semi-structured list of questions to elicit the views of all of the participants. Next, they summarise all of the main findings and perspectives provided by the participants. Afterwards, the summaries are analysed and a report is produced.

**B. Detailed step-by-step guide**

- Organise personnel and administrative tasks, such as preparing and sending materials.
- Define concepts to investigate during the session and then generate questions to the participants.
- Define the informed consent procedures of the focus group and prepare the templates of informed consent and information sheets that will be sent to participants when contacting them and signed prior to their participation.
- Select an appropriate location, plan and schedule the sessions.
- Invite the participants.
- Prepare copies of materials and identify small talk topics for icebreaking.
- Prepare audio equipment.

[11] Taken from Slocum, N. (2003), *Participatory methods toolkit. A practitioner's manual*.

- Begin taping the session, welcome the group, introduce yourself and provide the background information and an overview of the topic. Encourage the participants to give voice to their opinions and that the researchers are there to learn from these outputs.
- Explain how the results of the session will be used and what form the data will take.
- Outline the ground rules: one person speaks at a time; the session is being recorded to ensure that all comments are noted; no specific names will be used in the final report; all points of view are important to the discussion. Think of your own specific context and relevant ground rules worth enforcing.
- Ask a warm-up question for everyone to answer.
- Ask the introduction question and then move to the other questions as planned.
- During the discussion, use a flipchart to illustrate the ideas expressed if you feel necessary or helpful.
- Encourage all participants to express their views, for example by asking, ‘Does anyone have a different opinion?’ Too dominant participants and those who talk excessively should be reined in to give others opportunity. You may suggest that all participants initially write down a few thoughts in response to a question before the group discusses it together.
- Summarise the main points of view and then asks if the summary is accurate or if anything was missed. Answer any final questions about the focus group work.

4. Additional ideas / information

- Make sure that all personal data collection and processing regarding the activity is carried out according to EU and national legislation.
- This activity is adaptable online. Recording the session can be done with your mobile phone, or the integral option available via the online communication tool you are connecting through. As with the face-to-face version, you need to get approval for recording. A flipchart can be positioned within the reach of the camera, or you could explore the available options for co-creation within the online platform you are using. Any support materials can be distributed online in advance to facilitate the session.

## 7.6 FOUR QUADRANTS[12]

1. Short description

This method is a great way to introduce group members and to break the ice in a group. It is a popular true team-building method. It is about answering four questions that can be either personal or professional and allows group members to get an idea of each other.

2. When to use

This method can be used in the beginning of a project, task or other forms of collaboration. By breaking the ice through this method and making group members familiar with each other, the foundation is laid for a good and successful cooperation.

3. How to

**A: Brief explanation**

All in all, this method is based on answering different questions. Each participant divides his or her paper into four quadrants and writes the answer to one question in each of those quadrants. After a certain amount of time of individual work, the participants regroup and present their 4 quadrants and the answers in them.

**B: Detailed step-by-step guide**

- Firstly, the moderator needs to present the possible questions for this activity. Questions could be as follows:
    - What is my hobby?
    - What is my vision for this group / project?
    - What do I need from the group? What do I wish for?
    - What do I bring to the group?
    - What was a remarkable, defining moment in my life?

These questions can be adjusted and expanded if needed.

- There is no limit on how many people can form part of this activity. Maybe subdividing the whole group can be helpful if it is getting too big.
- Everyone is included and has equal opportunities to contribute.
- In the beginning everyone works alone and answers four questions. For this, each participant gets a piece of paper or chart and divides it in four quadrants. Then the participants write down the answer to the four questions in one quadrant each.
- Process of the activity: Firstly, each participant answers four questions alone by writing the answers down in one of the four quadrants. After a couple of minutes (5-10 min) each person shares his or her answers with the whole group.

[12] Adapted from SessionLab, https://www.sessionlab.com/methods/break-the-ice-with-the-four-quadrants-activity (public user content).

4. Additional ideas / information

- Questions can be changed and adapted to the context in which this activity is being used.
- Depending on the size of the group it might be smart to subdivide it in a few smaller groups.
- Participants can be very creative in the way they illustrate their answers (they don't have to write it down but can also draw something, use pipe cleaners to create shapes, etc.).
- This activity is adaptable online. You can distribute the template via email in advance for the participants to print out. The participants present their creations to the web camera – verbally, supported with drawings, pipe cleaner shapes, etc. It is possible that your online communication tool has an option to create a drawing/writing note in real time to share with the other participants.

ADAPTABLE ONLINE

5. Template

Template

# FOUR QUADRANTS

| | |
|---|---|
| *MY HOBBY* | *MY VISION FOR THE PROJECT* |
| *WHAT I BRING TO THE PROJECT* | *WHAT I NEED FROM THE GROUP* |

## 7.7 FUTURE WORKSHOP[13]

1. Short description

The aim of *Future Workshop* is for all participants to design their desired future without any objections or restrictions from experts or the organisation or leading personalities. The aim of this activity is two-fold: first, to design your desired future, and second, to develop unconventional and imaginative solutions to an issue or a problem. Overall, *Future Workshop* works with an atmosphere that promotes creativity and visionary thinking.

2. When to use

*Future Workshop* is helpful to use when new ideas need to be developed and visions need to be explored. Furthermore, it leads to gaining new perspectives as well as a clear view of future developments and possibilities for oneself and the organisation. It is also suitable if creative and visionary solutions for a problem are needed or if new perspectives and visions for the future development of the organisation are wanted.

3. How to

**A: Brief explanation**

*Future Workshop* consists of three main phases:

Phase 1: **Criticism phase** – in this phase the current situation is being analysed and problems are being identified.

Phase 2: **Fantasy phase** – ideas and suggestions are being developed (the initial ideas do not have to be realistic and can be visionary or utopian). Possible obstacles are being ignored at this stage.

Phase 3: **Implementation phase –** the suggestions are being structured and now it is being evaluated if they are realistic and viable. In this phase the participants are reaching an agreement on how to proceed from there.

**B: Detailed step-by-step guide**

➢ A concept needs to be defined that will be the main objective of the workshop.

➢ To execute *Future Workshop* a moderator has to be selected. The moderator will explain the topic of the session as well as the aim.

➢ The participants are asked to reflect on the status quo and to write down their points of critique.

➢ The participants are encouraged to envision their desired future or solutions. The question they can ask themselves is “what would the ideal future look like?”. The visions, ideas and

[13] Adapted from Participation & Sustainable Development in Europe, https://www.partizipation.at/future-workshop.html; mediaLABamsterdam, https://medialabamsterdam.com/toolkit/method-card/future-workshop/ ; and Apel 2004, https://www.die-bonn.de/esprid/dokumente/doc-2004/apel04_02.pdf.

approaches to solving the problem don't have to be realistic at this point; there are no barriers or limits.

➢ The generated ideas are being tested if they are feasible. Barriers and obstacles of those ideas should be written down so that their overcoming can be discussed.

➢ An implementation plan is being developed based on the ideas, visions and approaches that were generated in the process.

➢ The development of the implementation should be monitored.

4. Additional ideas / information

- Active and honest participation is essential for the success of the *Future Workshop*. If participation can't be encouraged the whole session might be unsuccessful.
- Creating a creative and non-judgemental atmosphere is crucial for the generation of new solutions and needs to be taken into account when preparing the room, selecting the moderator, etc.
- *Future Workshop* is an action-oriented method. The overall goal should not only be the creation and generation of new ideas but the implementation of those as well.

5. Template

Template

FUTURE WORKSHOP

| CRITICISM | FANTASY | IMPLEMENTATION |
| --- | --- | --- |
| | | |

## 7.8 HEART, HAND, MIND[14]

1. Short description

This activity aims at examining an issue / problem from many different angles and standpoints. *Heart, Hand, Mind* helps to recognise that both our intellect AND our emotions are what makes projects, activities and experiences appealing to us. This tool uses the three separate lenses of the heart, the head and the mind to inspire reflection of how each could impact an issue, plan or project.

2. When to use

This activity is especially helpful if various standpoints collide and are incompatible. *Heart, Hand and Mind* facilitates the swap of point of views and therefore helps to understand the opinion, perspective or argument of others better.

3. How to

**A: Brief description**

By using the three glasses "heart, hand and mind" an issue or project is being seen not only as it is but in its different components. Looking at an issue like this also helps to change perspective on precisely that.

**B: Detailed step-by-step guide**

1. Look at an issue, project, idea, or procedures using these three "glasses":

Heart: Why is this topic/task/project etc. emotionally engaging?

Hand: What is it, that makes it substantial and practical?

Mind: What are the reasons that it is logical and sensible?

2. Make a list of the characteristics or features that appeal to each one of the "glasses".

3. Rate the categories with points from 1 to 10 in order to evaluate strengths and weaknesses.

4. Additional ideas / information

- Another way of using these three aspects could be to 1) establish rapport and seek empathy with your listener (heart); 2) appeal to your listener's desire for evidence (head); and 3) ask your listener to take action (hand).
- It is important to start with having a goal in mind and to apply "heart, hand and mind" on it.
- Inspire the participants with the following quote:

[14] Adapted from: https://gamestorming.com/heart-hand-mind/.

"It's impossible, said Pride. It's risky, said Experience. It's pointless, said Reason. Give it a try, whispered the Heart." – Anonymous

## 5. Example and Template[15]

After developing your ideas, **evaluate each argument** and **score** its strengths and weaknesses on the scale 1-10.

[15] Adapted from: https://www.tamarackcommunity.ca/hubfs/Resources/Tools/The%20Heart,%20Hand%20Mind%20Tool%20&%20Worksheet.pdf?hsCtaTracking=af9808cc-45e7-478d-8a47-44394d1d1fca%7C3a571954-8cbc-488b-86e4-84c2fa1a1af9

| **HEART** | *What makes it emotionally engaging?* |
|---|---|
| | Gender equality is a must for social justice and creating equal opportunities for all. It is *the right thing* to do. |
| **HAND** | *What makes it tangible and practical?* |
| | Half of the national population is female, so *it is possible* to have an equal representation of women in the society. Also, women do better academically than men, so they are well-qualified to achieve what they aspire to. |
| **MIND** | *What makes it logical and sensible?* |
| | There are talent shortages in the knowledge economy, so work organisations cannot afford to lose valuable female talent and should actively attract female candidates to work for them. |

**HEART** *What makes it emotionally engaging?*

**HAND** *What makes it tangible and practical?*

**MIND** *What makes it logical and sensible?*

## 7.9 INTERVIEWS

1. Short Description

One of the best ways to understand how stakeholders make sense of current situations or topics is by talking directly with them and asking about their specific experiences. The stakeholders' knowledge is an important prerequisite for developing concrete ideas for new initiatives or improvements.

2. When to use this method?

An interview can be used in several stages of your plan implementation: during start-up to zoom in on the project's focus, in the inquire phase to increase your knowledge about the stakeholders' experience and understanding of a given situation, and later to test a response to the developed concepts, ideas and prototypes.[16]

3. How to use this method?

**A. Brief explanation**

The most effective interview approach outside of a research project situation is most probably a semi-structured interview, which allows the investigator to gently guide the flow of the dialogue, and at the same time

**B. Detailed Step-by-step guide**

- Select 5-8 people from your target audience. To get a full understanding of the field you are studying, it is important that you interview people with different experiences. For example, it may be how legislation is experienced differently depending on the size of the institutions affected by it.
- Define the informed consent procedures of the interviews and prepare the templates of informed consent and information sheets that will be sent to interviewees at the moment of contacting them.
- Get in touch with people from your target audience. Briefly tell them about the background of the project, the duration of the interview, any preparation that might be necessary and how the content will be used.
- Prepare for your interviews by formulating a wide variety of questions that comprehensively cover the stakeholder's experience and attitude to a given situation or subject. Ask yourself: "What do I want to know about the stakeholder?" And "What do I want to know about the stakeholder's first-hand experience of the current situation or subject?"
- Save any questions about the stakeholder's opinions you may have for the end of the interview.
- Ask open-ended and specific questions so you do not assume too much about the stakeholder's answers. Start with the questions: who, what, where, how and why, so you do

[16] Description and template adapted from www.mind-lab.dk

not end up with a yes or no answer. Encourage the interviewee to elaborate and provide examples to the responses.

- The interview should take place in the environment the interview is about, for example, if you are inquiring about something related to the person's work or institution, then the interview should take place there. You can ask the interviewee to give you a tour of the workplace, if it is relevant for the project.
- Introduce yourself, your role and explain why the stakeholder's input is important to the plan or project. Collect the signed informed consent form and information sheet that explains the objectives of the interview and how personal data will be collected, stored, protected and deleted. Ask if you can record the conversation and take pictures for internal use.
- Select key insights, observations and quotes. Use quotes from the interview to present the discovered insights for your colleagues or at a workshop.

4. <u>Additional ideas / information</u>

- Make sure that all personal data collection and processing regarding the activity is carried out according to EU and national legislation.
- This activity can be successfully adapted online. Recording the session can be done with your mobile phone, or the integral option available via the online communication tool you are connecting through. As with the face-to-face version, you need to get approval for recording.

ADAPTABLE ONLINE

5. <u>Template</u>

Template

# INTERVIEWS DRAFT

## TIPS FOR INTERVIEWING:

• Choose environment in which your informant works or practices and where they feel at relaxed. This helps the interviewee to imagine and address specific situations related to practice.

• Record the interview on your phone. This will help you focus on listening and being present. BUT, remember to always ask permission to record!

• Set the scene. Make sure your interviewee can feel at ease. Break the ice before plunging into your questioning mode.

• Take the ownership for the situation. You are the "host"!

• Begin with “wh*” and “how” questions:
“Hows” calls for descriptions, context and stories
“Wh*s” lead to reflections and feelings

• Don’t overcomplicate questions. Simplicity usually results in better answers.

## INTERVIEWEE PROFILE:

NAME:

ROLE:

ORGANISATION:

RELATION TO THE PROJECT:

## GENERAL QUESTIONS:

1.

2.

3.

## SPECIFIC QUESTIONS:

1.

2.

3.

## FINDINGS:

## 7.10 MATURE YOUR IDEAS[17]

1. Short Description

*Mature Your Ideas* can help you select the most promising ideas, by maturing and refining them. This method is a structured and a solution-oriented way to build on ideas that at first appear compelling after a brainstorming session. This method evaluates the strengths of the ideas and suggests solutions to the challenges that these ideas may have. This is similar to SWOT but not entirely the same.

2. When to use this method?

Use it straight after a brainstorming activity to work with the stock of the generated ideas.

3. How to use this method?

**A. Brief explanation**

This method can be used as a group or individual activity. If using it as a group activity, divide the whole group into several sub-groups of four or three participants to work on one idea only and all four categories of strengths, potentials, challenges and solutions relating to this one idea. Each sub-group will work on a different idea. Alternatively, all the sub-groups can work on the same idea, but only focus on one of the categories of strengths, potentials, challenges and solutions.

If this is an individual activity, each participant can work in silence and then share their ideas to the group. You can then collect all the ideas and present them visually on a flipchart, or after the event collate it in a document which you share with the participants. Remember to emphasise the solutions so that the ideas become stronger and more viable.

**B. Detailed Step-by-step guide**

- Choose an idea that you would like to develop from your brainstorming session.
- Strengths: Write at least three strengths of the idea.
- Potentials: Write at least three suggestions on effects that the idea could help create.
- Challenges: Think about the challenges you foresee related to the idea. When writing the challenges, you can formulate them as development questions. If the challenge is that the idea is too costly, a development question could be "How can we mobilize more resources?"
- Solutions: Brainstorm on how the challenges can be overcome. That is how the idea can be improved. Once you have completed the process, you are left with a stronger idea that could look quite different from when you began.

4. Template

[17] Adapted from www.mind-lab.dk

Template

# MATURE YOUR IDEAS

| STRENGHTS | POTENTIALS |
| --- | --- |
| | |

| CHALLENGES | SOLUTIONS |
| --- | --- |
| | |

## 7.11 MENTORING CIRCLES

1. Short Description

   *Mentoring Circles* differ from the traditional mentoring model in that they involve using an innovative, group mentoring model. *Mentoring Circles* typically involves one mentor working with a group of mentees or groups of people mentoring each other. Often there is a facilitator to ensure the conversations are focused and productive (Darwin and Palmer, 2009). Circles generate many diverse perspectives, with group members creating synergies through combining experiences beyond what individual members know or contribute (Ambrose, 2003).

2. When to use this method?

   Multiple mentoring can be generally used when you want to[18]:

- ✓ Combine the unique skills of many individuals who can share them with their colleagues.
- ✓ Encourage the spirit of teaching, sharing, giving, requesting help, and helping
- ✓ Support team building and mutual competency development within a team
- ✓ Cross-train on specific expertise or skills
- ✓ Capitalise of the seasoned expertise of one knowledgeable individual and share it with many learners simultaneously

3. How to use this method?

**A. Brief explanation**

*Mentoring Circles* is particularly effective when there aren't many mentors available. It involves one experienced individual, acting as a mentor to a group of mentees, and who provides them with technical and organisational advice and guidance. Moreover, the mentor helps the circle members utilise their combined energies and experiences in order to support each other to excel, which they would not have been able to do on their own. This approach facilitates generating diverse perspectives beyond a single point of view (Ambrose, 2003).

Before you begin, consider the following questions[19]:

- What outcomes do you expect from the mentoring group experience?
- What three things do you want the mentoring group to be known for?
- What professional growth and development issues do you want the mentoring group to focus on?
- What do you believe could get in the way of the mentoring group's effectiveness?
- When it comes to facilitating ideas in a group, where are you the strongest? Where are you the least effective?
- What do you expect of other participants in your group?
- How will you know if the mentoring group is working? What will indicate success?

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[18] Adapted from Ambrose (2003:58)
[19] Ibid.

### B. Detailed Step-by-step guide

- Identify an experienced, knowledgeable individual who will agree to become a mentor (without any coercion).
- Invite 6-8 members to be mentored. It is very important that their attendance is voluntary.
- The members have to commit to meet x (e.g. eight) number of times for two hours (or longer) over a period of x (e.g. six) months.
- Appoint a facilitator for each circle to maintain the focus of the group, promote discussion and ensure equal participation.
- The initial group meeting should clarify expectations, review topics to be covered, set ground rules for working together, outline desired outcomes, and raise potential concerns such as teamwork, confidentiality within groups, developing trust among participants, and preventing meetings from becoming “complaint” sessions.
- Start with Four Quadrants, which is included in the toolkit to help you get people thinking about the circle. Use 1-2-4-All to discuss expectations, topics, desired outcomes, and potential concerns.
- Address discussions from previous sessions, share weekly learnings and discuss outcomes of previously identified action items.
- In the final session, the circle should evaluate the relationship in a formal fashion and discuss whether the goals and objectives of the sessions were met, what worked well, and what could be done to make the process better.[20]

4. Additional ideas / information

- *Mentoring Circles* success factors include a commitment to attend, confidentiality, rapport between circle members, and voluntary attendance. These sessions need to be seen as one of many developmental activities offered within the institution to support staff, and potential participants need to feel comfortable with working in groups. Above all, participation must be voluntary[21].
- This activity is adaptable online, in that the meetings take place through an online communication platform. This mode of communication may in fact facilitate the frequency of meetings, as geographical and time barriers for all participants to meet can be diminished.

[20] Taken from Ambrose (2003: 59)
[21] Adapted from Darwin and Palmer (2009: 134)

## 7.12 NINE WHYS[22]

1. Short description

   This activity helps individuals and groups to crystallise what is important in what they do/their work. It also facilitates the identification of an unambiguous shared purpose, which leads to more freedom and more responsibility. The overall goal of this activity is to clarify the purpose of the participants working together.

2. When to use

   If you want to instil motivation, engagement and a sense of belonging, it is important to help your participants realise what they are working towards and to let them see the bigger picture. This activity can help identifying this shared purpose, common goal or vision.

3. How to

   **A: Brief description**

   By continuously asking why someone is doing something, the real purpose of their work, action or project is being revealed. By exchanging the results of the interviews (where one person is asked "Why" up to nine times) common purposes, goals and values are being identified.

   **B: Detailed step-by-step guide**

   1. The central question of the whole activity is "why?". But first, the activity starts by asking "What do you do when working on XYZ (the project, a challenge, etc.)? The participants are asked to make a list of the activities." The next question is going to be "Why is this important to you?". Then keep asking, "Why? Why? Why?". You can do that up to nine "Whys". It is possible that a participant can't go deeper because they have reached the fundamental purpose for this work – in this case there is no need to ask "Why" nine times. Once this happens, it will become clear to the individual who will sense that they've reached the ultimate answer.

   2. The number of groups who participate in this activity is not limited. Each of the participants has an equal opportunity for participation and contribution.

   3. The activity starts with the participants working in pairs, then they pair up again (into groups of fours) and then the whole group works together.

   4. Process of the activity

   First, each participant interviews his or her partner and starts with the question "What do you do when working on XYZ?". The person who interviews tries to get a deeper answer by asking "Why is that important to you?". The interviewer then goes on with "Why?" as long as the interviewee has not reached the fundamental purpose of his / her work. After that, they switch. Then they pair up with another pair and share their insights. To finish up,

[22] Adapted from Liberating Structures, http://www.liberatingstructures.com/3-nine-whys/.

everyone is invited to participate by asking “How do these findings influence the next steps we take?”

4. Additional ideas / information

- The question “Why is it important to YOU?” is really significant as well as the emphasis on YOU because it is all about the individuals, rather than their organisations.
- By sharing the different responses and reflecting on differences within the group it can lead to define a common purpose.

5. Template

# NINE WHYS

Why is this task /project/work important to you

Why?

Why?

Why?

Why?

Why?

Why?

Why?

Result: Better understanding of the fundamental purpose of the task/project/work!

## 7.13 PLAN OF CHANGE (THEORY OF CHANGE)

1. Short Description
   *Plan of change* is based on the theory of change, which is viewed as a tool and methodology to outline the logical sequence of an initiative from inputs to outcomes. Alternatively, it is understood as "a deeper reflective process and dialogue amongst colleagues and stakeholders, reflecting on the values, worldviews and philosophies of change that make more explicit people's underlying assumptions of how and why change might happen as an outcome of the initiative" (Vogel, 2012: 3). However, theory of change benefits from combining both approaches. The outlining of the logical sequence is supported by critical thinking about the surrounding conditions that influence the plan, the motivations and contributions of stakeholders and other actors, and the different interpretations or certain assumptions about how and why that order of change might emerge (Vogel, 2012).

2. When to use this method?

   When you want to apply critical thinking to the design, implementation and evaluation of gender equality plans or other initiatives intended to support change. It helps to make assumptions explicit. Assumptions act as 'rules of thumb' that influence our choices, and they reflect deeply-held values, norms and ideological standpoints.

   These assumptions shape the design and implementation of plans. If we make these assumptions explicit, it will allow us to check, debate and enrich them to strengthen our plans. By critically reflecting, *theory of change* could support plans' innovation and adaptation in response to dynamic contexts. It encourages constant "questioning of what might influence change in the context and drawing on evidence and learning during implementation" (Vogel, 2012: 4). Thus, *theory of change* thinking can stimulate improvements in plans, "beyond responses towards more realistic and feasible interventions that are responsive to dynamic contexts" (2012: 5).

3. How to use this method?

**A. Brief explanation**

*Plan of Change* helps to expose how our current plan is organized, check if our new ideas are logically consistent, or examine if a specific action will work. The method can help rethink our plan completely, and from the start help to focus on what changes the project could influence. You can use this method to start off projects or as a tool for project management. It illuminates what we know and don't know and where we should be focusing our efforts on. This should ultimately help us to ask the right questions, to ensure the project develops with according to the aim, and end with the expected effect.[23]

**B. Detailed Step-by-step guide**

➢ Book a meeting for at least 2 hours, inviting relevant participants that as a group possess deep knowledge of the focus area. Print the template or write the headlines on a piece of paper and use it as the focal point for the discussion. In the template we work from "impacts"

[23] The description and the steps are adapted from www.mind-lab.dk

and work towards “resources”, but you can also begin with “resources” and work towards “impacts”.

- Write all desired impacts the project should achieve on post-it notes. If possible, write how you wish to evaluate these impacts. Impacts are the results of activities. For example, a long-term impact could be “higher rate of women in senior roles”, and the short-term impact leading to this could be that “people within institutions can access the necessary information about the current gender rates in senior roles”. It's important to distinguish long and short terms impacts as it helps to understand and create a change strategy.
- Describe the results that would lead to the desired impacts. For example, "institutions will attract female job candidates with sufficient qualifications". Be aware, that there might be several different results in the activities. Write the results on post-it notes and attach them to the template. Draw pathways between the impacts and results – and discuss which results precede a given impact.
- Write down activities (actions, instructions, contact points or control visits) the plan will consist of on post-it notes. Are all the relevant activities included? If there are activities that are performed by others, then you should also consider adding them. Draw pathways to impacts and results.
- List the resources (finance, people, buildings, IT, etc.), that will be used to implement the activities. Draw lines to connect resources with activities, results and impacts of short and long term.
- Identify the critical assumptions the plan is based on and list them. For example: "we assume that we have enough female candidates with the skillsets the institution demands."
- You are now ready to work with your change plan. What questions does your change plan pose, and how will you proceed to work with new activities and resources, to achieve the aimed effects?

4. Additional ideas / information:

Alternatives[24]:

Group discussion:

- What are the main types of changes that we want to support?
- What are the main 3-5- development conditions that need to be in place for change even to be possible?
- Identify the 3 most important relationships between these conditions and write them as affirmative statements
- Discuss in the group, use drawing and cards to develop the discussion.

Another simple starting point:

- Share a story of change in a group discussion
- Ask: What happened? Who was involved? What do you think helped the change happen? What, if anything, did we contribute? How do we know?

[24] All the alternative questions have been taken from Vogel (2012: 23-24).

- Discuss and use as an opportunity for reflection.

Some guiding issues and questions to use in the process:

1. The context for change – how change happens

**Who are we aiming to support and why?** (clarifying the target group and prioritising the key issues they face, if appropriate)

**Who are the groups, and what are the structures and processes that influence change in the target group's lives?** (ranking them in their importance to the target group; and showing whether they influence change positively, negatively or both)

- How do we know? – what is the basis for our understanding/ learning?

2. Our organisational (or programme) contribution to change

**What are the long-term changes that need to happen in the target group's lives?**

- What is our overall vision for change as an organisation/programme?
- What are the key four or five long-term changes to which we can contribute?

**Who and what needs to change in order to achieve those long-term changes?**

- What changes need to happen at other levels or dimensions in order to achieve the long-term changes (e.g. at community level or in policy or systems).
- What factors relationships or approaches influence change at each level?
- Who are the groups we can influence? What changes need to take place in them?

**What factors relationships, approaches, pathways influence change at each level?**

**What are the three to five key factors to which we can contribute that will be vital in bringing about 24 change?** (i.e. our core beliefs about how we influence change)

- How do we know? – what is the basis for our understanding/ learning?
- Why do we think that change will happen that way? (our rationale/ assumptions)
- What are the risks (external and internal) that might prevent change taking place?
- How might we need to tailor our approach to groups with specific vulnerabilities?

3. Applying our theory of change

**How will we know and measure if we have brought about change?**

**How will we apply it to our organisation, programme and learning processes?**

# PLAN OF CHANGE

| LONG-TERM IMPACT | SHORT-TERM IMPACT | RESULTS | ACTIVITIES | RESOURCES |
|---|---|---|---|---|
| | | | | |

## 7.14 SMART CRITERIA / GOALS[25]

1. Short description

If one is always working hard to achieve a goal but not making progress then SMART goals can help to clarify ideas, focus efforts, use time and resources productively, and increase the chances of achieving an objective. Studies have shown that people who have ambitious and tangible goals perform better than people who have imprecise and unambitious goals. The letters stand for Specific, Measurable, Attainable, Realistic and Terminable. It helps to determine the objectives of actions.

2. When to use

SMART criteria support the clarification of goals and objectives. It is therefore a valuable tool for the planning and implementation of a project. Objectives are easier to reach if they are defined and clarified. If it is not clear to everyone what they want to achieve and where they want to be in the end, the process lacks productivity, structure and might not be successful. If this is the case SMART criteria can help defining and understanding the goals which leads to understanding and motivation of the team or oneself.

3. How to

**A: Brief explanation**

The SMART acronyms stand for:

Specific: Is the goal concrete and unambiguous? Is it clear what is to change with whom / where / what is to have changed after achieving the goal? Define what exactly the goal is.

Measurable: Is it possible to check whether the goal has been achieved? Are there numbers who indicate the success of a project/task?

Attainable: Is the goal achievable and feasible?

Realistic: Is the goal achievable at all? Can it be done?

Timely: Can the goal be achieved within a certain period?

**B: Detailed step-by-step guide:**

First, there has to be a goal. Let us use the example of “I want to improve my health”.

Then you need to check the criteria above. What is important is that not every time all the criteria are applicable.

Specific? Is my goal specific? How am I going to achieve it/by doing what?

[25] Adapted from Lawlor and Hornyak 2012 and MacLeod 2013. Based on Mindtools, https://www.mindtools.com/pages/article/smart-goals.htm.

How do I want to Measurable? Control if I am improving my health? Beforehand I need to define parameters that can be used to determine success.

Attainable? To check if a goal is attainable various factors need to be considered. It might help to talk to other people who tried something similar if what you want to do really is feasible.

Realistic? To answer this question, it is important to look on some of the other criteria, for example terminable.

Timely? Until when do I want to achieve my goal? Is there a specific deadline until I want to reach my goal?

In the end the goal often just needs to be rephrased, specified or operationalised. In this case it would be better to say the following: "I will improve my health by exercising twice a week (measurable, specific), drinking two litres of water a day and sleeping 8 hours every night for the next two months (terminable, specific). The overall goal is therefore specific, measurable, attainable, realistic and timely.

4. Additional ideas / information:

- Not every criterion has to be used every time
- If the criteria are met than the objective as a great basis for the task, project, work, etc.
- When using SMART clear, attainable and meaningful goals can be created as well as motivation, action plan and support needed to achieve them.
- This tool can be used in online or face-to-face group sessions, as well as on an individual basis.

ADAPTABLE ONLINE

- 5. Template and Visualisation

Template

## SMART CRITERIA

**MY GOAL IS TO:**

**IS IT SPECIFIC?**
What exactly do I want to achieve? For whom exactly? Why is this important? Who is involved? Where is it located? Which resources do I need?

**IS IT MEASURABLE?**
How much? How many? Quantify your goals. How will you know when you've reached it is accomplished?

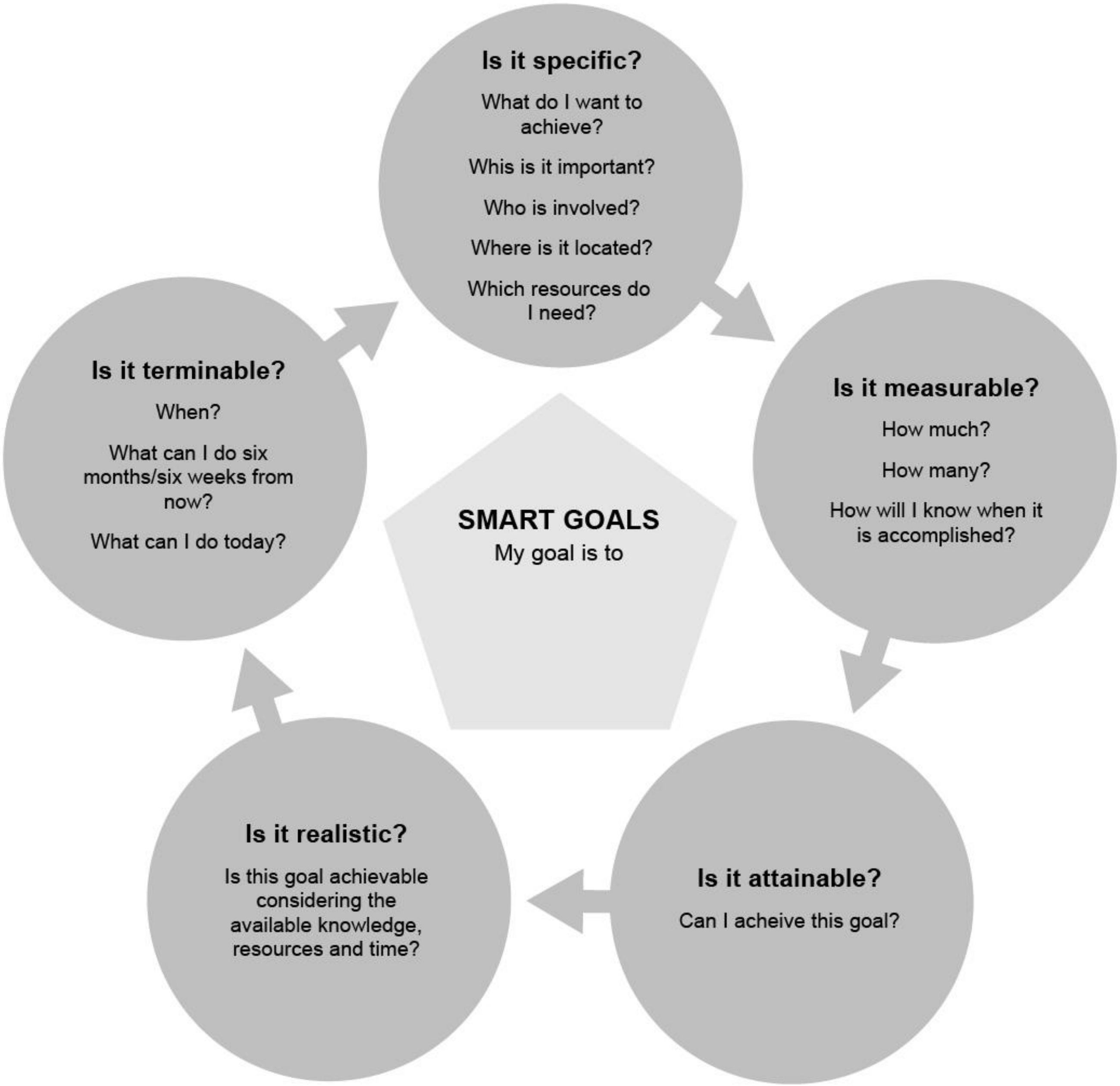
**IS IT ATTAINABLE?**
Can I achieve this goal?
Have I got access to the resources?

**IS IT REALISTIC?**
Is this goal achievable considering the available knowledge, resources and time?

**IS IT TERMINABLE?**
When? What can I do six months from now? What can I do six weeks from now? What can I do today?

**Template**

# SMART GOALS VISUALISATION TO USE DURING WORKSHOPS



## 7.15 SWOT AND PESTEL[26]

1. Short description

*SWOT and PESTEL* facilitate the identification of external and internal factors that ought to be considered when planning a project or an activity. These analytical tools can be used together or on an individual basis, but here as part of the co-creation toolkit, they will be presented as a group activity to support planning of strategy and action and making decisions. These activities can be successfully conducted online. If using flipchart, ensure it is within the reach of the web camera. Alternatively, explore the available options in the online communication platform to use co-creation tools in real time.

ADAPTABLE ONLINE

2. When to use

Use these combined methods or each method separately every time you want to understand your external and internal factors for better planning and decision making.

3. How to

**A: Brief description**

**SWOT**

SWOT stands for Strengths, Weaknesses, Opportunities, and Threats. Strengths and Weaknesses are internal, as they exist inside the organization or within the consortium, or within the CoP). On the other hand, Opportunities and Threats are external factors, which exist outside the organization.

It is possible to start the analysis from S and W, however, you could also start with the external factors, O and T, and then move to the internal ones. This may enable a sharper focus on results, and may help to identify the 'critical threats' (i.e. those that are related to corresponding weaknesses) and which opportunities are promising opportunities (i.e. those that are related to corresponding strengths).

It is important to clearly define the objectives of the analysis linked to the project or plan, and they have to be well understood by participants. Objectives provide a perspective, from which the external and internal factors can be identified as Strengths or Weaknesses, Opportunities or Threats. Different objectives of the same project or plan can colour the SWOT analysis in very different ways.

**PESTEL**

PESTEL takes SWOT further by focusing on specific types of issues that may have an impact on implementation of project/plans.

PESTEL stands for Political, Economic, Social, Technological, Environmental and Legal. It helps to identify the factors in each of these areas that are relevant to your project or plan.

[26] Adapted from https://www.unicef.org/knowledge-exchange/index_83128.html

What PESTEL enables particularly well is identifying trends, which can help to proactively anticipate change, rather than being reactive or passive towards it.

It is recommended to use PESTEL and SWOT together. This is because if your project context is rich and complex, then PESTEL will be particularly valuable in identifying factors which SWOT on its own would not be able to elicit.

Applying PESTEL is uncomplicated. Just pay attention to steps 2 and 5 for an enhanced analysis with PESTEL.

**B: Detailed step-by-step guide**

The steps below are for SWOT. The more time you have for the SWOT, the more time you should spend on the analysis and discussion steps (steps 5-9 below). If you decide to also include PESTEL, then you will need to prepare additional research before the session. It is a good idea to have a rapporteur helping you facilitate the session.

1) Provide a short and clear statement of the project/plan objectives to be analysed in the SWOT. The statement should be no longer than one paragraph. Cut down on the detail and include only the gist of the project/plan objectives and expected outcomes.

2) Invite participants (about 8-12) who are involved in the project/plan/decision. You can share with them prior to the meeting, the statement of the objectives. Help the participants prepare for the SWOT in one of the two following ways:

a. Option 1: Ask some or all participants to conduct PESTEL research and to share their findings with you a few days before the meeting. For example, assign each of the domains to one person only, or split them among 2-3 people, or give it to one person who is very familiar with the context to cover them all. Ask for a simple list of the key factors for each domain with enough information to define each of them, such as a sentence, or a brief paragraph. As a suggestion, PESTEL research for one domain could be as long as half a page or a few pages.

b. Option 2: Ask participants to think about SWOT before the event.

3) Start the meeting and quickly describe the method. Ensure your rapporteur is ready, as their notes will enrich the flipchart notes that you will write during the meeting.

4) Make sure the group understands the objectives and outcomes to be analysed in the SWOT, and which group/team (institution, CoP) would take action to implement them.

5) Brainstorm the external categories (Ts and Os):

    a. If you are using PESTEL alongside SWOT, then PESTEL results which have been researched by the participants should be the starting point. Share the findings of PESTEL factors by displaying them all at once on board/flipchart/wall so that everyone can see or use PowerPoint. Ask other participants to enhance and broaden the PESTEL findings by thinking of other factors. Next, brainstorm Os and Ts for each PESTEL factor. Note down the results on flipchart sheets. At this stage you are looking for lots of relevant ideas. Once all the PESTEL factors have been discussed, ask the group to identify any further unexplored Ts and Os. You can prompt them using the questions in section 4. Additional ideas/information below.

b. If you are not using PESTEL, just brainstorm the Ts and Os, using the relevant questions (from section 4). Elicit plenty of ideas without filtering for importance yet. Use sheet(s) of flipchart paper for each category.

6) Next, brainstorm the internal categories (Ws and Ss), again using the suggested questions (in section 4) as prompts, and eliciting plenty of relevant ideas.

7) The next part of the activity is to rank the SWOT factors by their perceived importance, which is linked to the potential impact on the objectives and outcomes of the project or plan, and also its likelihood. When the participants have brainstormed all the SWOT factors, you will have produced four lists for each factor. Display the list sheets for participants to see them. Next, rank the ideas by importance, and mark each idea with an agreed symbol to illustrate the group's opinion, e.g. ++ for very important factors, + for less important factors, or 0 for unimportant ones. This ranking discussion should be informal, for example, ask for a show of hands, but written ballots for ranking are not appropriate. Or give all participants sticky dots/post-it notes with 3 different colours and ask them to assign their ratings to each of the ideas.

8) Next, elicit a discussion how the highly rated items in the categories relate to each other. For example, a particular strength may be actually linked to a certain opportunity, or a particular threat may exacerbated, because of a certain weakness. This is more effective if you PESTEL has been used and discussed Ts and Os first. This is because PESTEL factors will make the impact of various Ss and Ws clearer.

9) The following step is recommended, although optional: before you finish, if your group has change-implementing/decision-making power, try to outline a short action plan based on your analysis and on the objectives of the project or plan you have analysed. If your group hasn't got any change implementing/decision-making powers, suggest a few possible action points. If the objective of the session was to make a yes or no decision, summarize your recommendation and reasons. Your action plan or your recommendation should include the following:

   a. How to pursue opportunities;
   b. How to overcome, prevent or avoid threats;
   c. How to use or capitalize on strengths;
   d. How to overcome, minimize or compensate for weaknesses.

10) Follow-up. After the SWOT, write a summary with decisions and recommendations, which are based on the flipchart sheets and notes from the rapporteur, and distribute it to participants, decision-makers and other relevant parties.

4. Additional ideas/ information

**Factors to consider in PESTEL**

Distribute these factors and mind prompts with those who you have asked to conduct the analysis and ask them to identify specific examples in the context of the project or plan that will be analysed in the official session. These PESTEL factors have relevance only in the specific operational context, so only focus on the ones that could impact your project/plan and use them for the analysis.

**Political**

- Government policies: National, state/provincial, local, other.
- Government resource allocations.
- Stakeholder needs or demands.
- Lobbying/campaigning by interest groups: local, national, international. Influences/pressures from international actors, e.g. other governments, international organizations, etc.
- Changes in power, influence, connectedness of key relevant actors/groups.
- Expected direction of future political change: future policy prospects; upcoming elections and possible change in government (local, state, national) and its consequences; other relevant political trends.

**Economic**

- Economic situation: local, national, regional, global.
- Economic situation of specific relevant communities or population groups (including employment, taxation, mobility, etc.).
- Economic situation and prospects of any relevant industries.
- Infrastructure: local, national, other.
- Financial situation of key partners or other relevant entities.
- Availability of private sector resources relevant for the project/initiative.
- Expected direction of economic change: prevailing economic trends, trade and market cycles; expected economic interventions by governments and their consequences; other relevant economic trends.

**Social**

- Demographics and population trends.
- Public perceptions (of an issue, an initiative, an organization or other actor).
- Relevant customs, traditional beliefs, attitudes (e.g. towards children, adolescents, gender, etc.).
- Media views.
- Role models, celebrities, spokespersons.
- Knowledge, attitudes and practices of a particular population group (with regard to a relevant issue).
- Potential for knowledge exchange.
- Migration (which also has political, economic and legal dimensions).
- Major relevant events (upcoming or already happening) and cultural trends.

- History, to the extent that it affects social attitudes and perceptions.
- Factors in social identity, e.g. religious, socio-ethnic, cultural, etc.
- Dynamics of how social change happens in the given context.
- Management style, staff attitudes, organizational culture (within a major relevant organization).
- Expected direction of social change: broad trends in change of social attitudes (e.g. towards a relevant issue); other relevant social trends.
- Credibility of information sources or communication channels (e.g. media outlets, well-known individuals, etc.) among a target population. Reach of information sources/communication channels among a target population.

**Technological**

- Population groups' access to technologies.
- Patterns of use of existing technologies (which may be changing, e.g. evolving use of mobile phones).
- New technologies that could impact the context significantly, or that could be used to achieve objectives.
- Technologies and related infrastructure/manufacturing / importing requirements for an initiative to succeed.
- Possible replacement/alternative technologies.
- Potential for innovation.
- Technology transfer, access, licensing issues, other issues related to intellectual property rights.
- Foreseeable technological trends: economic and social impact of adoption of existing technologies; rate of technological change; other technological trends.

**Environmental**

- Environmental impacts of planned or ongoing activities.
- Trends or expected future developments in the environment.
- Geographical location.

**Legal**

- Human rights (gender rights).
- Existing legislation having an impact on any relevant factors (economic, social, technological, environmental or other factors relevant to the issue), or affecting

population groups relevant to the issue, or impacting the work of the organization or its partnerships.

- Pending or future legislation.
- International treaties/agreements, either existing or in preparation.
- Standards, oversight, regulation and regulatory bodies, and expected changes in these.
- Ethical issues.

## 7.16 W3: WHAT, SO WHAT, NOW WHAT[27]

1. Short description

This activity helps groups to reflect on and think about shared experiences. The result will be a mutual understanding and will help to act in a coordinated way without losing time and energy with unproductive differences and conflicts. Every voice is being heard in this activity. At the same time it supports to look for insights and to find and shape new ways and directions. The process starts by looking at “What Happened” and discussing that. Then, those facts are being analysed with “So What” and finally it’s being discussed what follows with “Now What”. This helps eliminating most of the misunderstandings that otherwise fuel disagreements about how to proceed.

2. When to use

The goal of this activity is to look back on a process and decide if and what adjustments are necessary. It helps to weigh up whether the previous procedure was the right one and to find a new path that might be better for the overall goal or how to adjust the previous procedure to make sure it is aligned with the objectives.

3. How to

**A: Brief description**

This activity consists of answering and discussing three questions (usually after a prominent incident or if the process is stagnating): 1) WHAT?, 2) SO WHAT?, 3) NOW WHAT?. By answering those questions what had gone wrong is being described, analysed and a solution or new approach is being developed.

**B: Detailed step-by-step guide**

1. The basic question to start with after a shared experience (for example something did not work out as planned) is “WHAT? What happened? What did you observe?”. The answers to those questions will be collected. The next question to ask is “SO WHAT? Why is this important? What patterns or conclusions are emerging?” Then, after understanding and making sense of what has been discussed, ask “NOW WHAT? What action would make sense in this context?”

2. The number of groups in this activity is not limited. Each group should consist of 5-7 people.

3. Everyone is included in this activity and has equal opportunity to contribute to each group.

4. Process of the activity

First of all the group needs to be divided in smaller groups of 5-7 people. Then the first step is “WHAT?”. Everyone starts out working alone on this question and then they continue working on this in small groups. The most prominent aspects from the small groups are

[27] Adapted from Liberating Structures, http://www.liberatingstructures.com/9-what-so-what-now-what-w/.

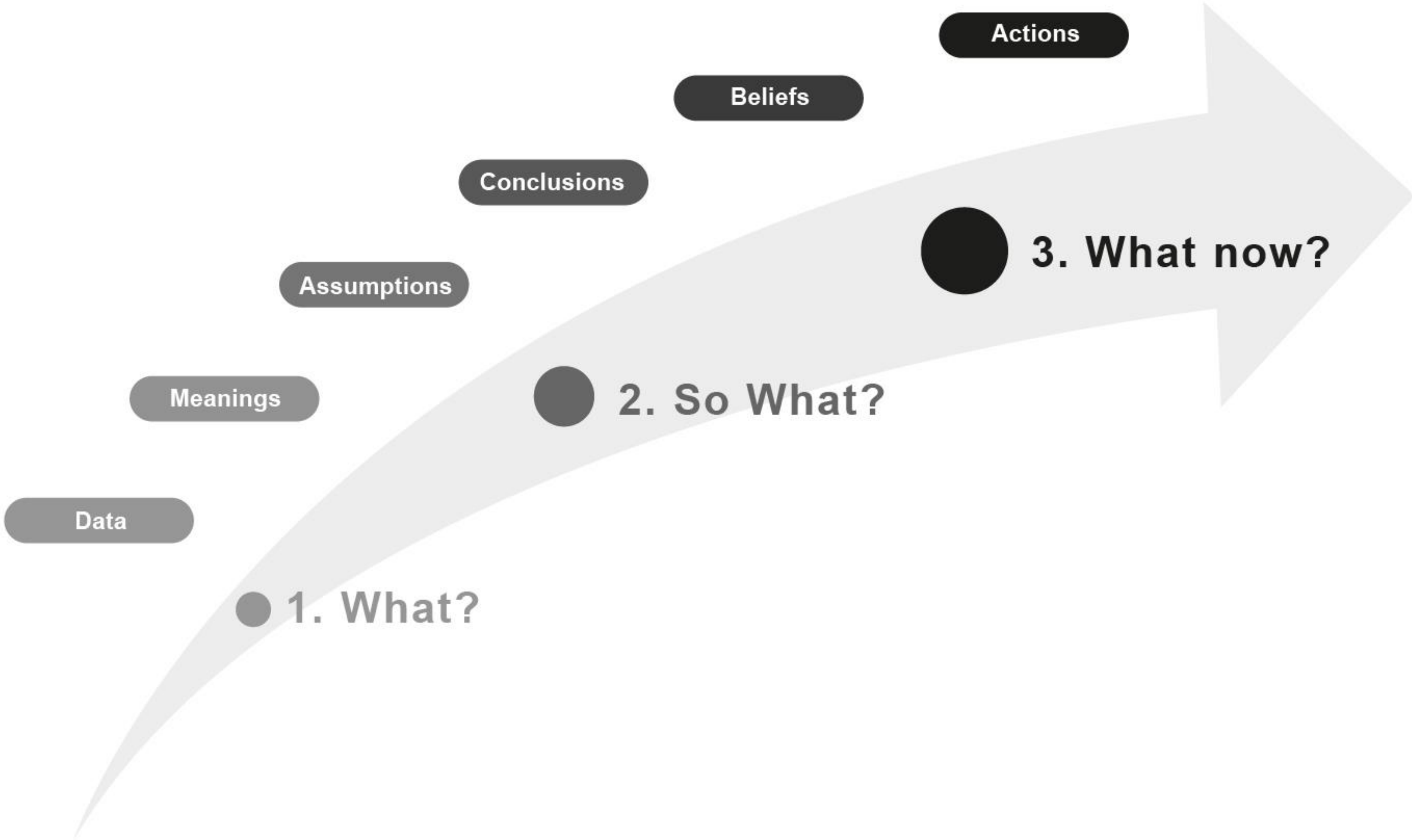
shared with the whole group and collected. Then they continue with the question “SO WHAT?”. They again, start working alone and they discuss the question within the group. Striking aspects are shared with the whole group and are collected. After that, the participants continue with the third W: “NOW WHAT?”. Like before each participant starts working on this question alone before discussing it in the small group. The proposed strategies and actions are being shared with the whole group and are being discussed.

4. Additional ideas/ information

- During the process it would be good to check in on the small groups and ask if it is clear to them which answer belongs to which category as that might be a bit confusing. It could also help to share some answers with the whole group to avoid misunderstandings.
- Feedback is really important for this activity. Without feedback there won’t be progress / learning.

5. Visualisation:[28]

[28] Based on Liberating Structures: http://www.liberatingstructures.com/9-what-so-what-now-what-w/


Actions
Beliefs
Conclusions
3. What now?
Assumptions
Meanings
2. So What?
Data
1. What?

## 7.17 WHAT I NEED FROM YOU[29]

1. Short description

This activity aims to help people working in different contexts to quickly get better in asking each other for things, resources, help, etc. they need in order to be successful. It also helps to avoid misunderstandings and to overcome bias and prejudices that have been built up over time. This is being facilitated by making clear and tangible what group members need so that they can achieve common goals.

2. When to use

This activity is helpful to clarify and identify the needs of every person involved in a project / activity. By identifying those needs efficiency is boosted to work successful and productive toward an objective. So if the work in an organization/ project lacks efficiency this activity could help by identifying, communicating and addressing the needs of people involved.

3. How to

**A: Brief description**

The participants communicate what they need from other people involved. The people involved get the chance to respond to that, which leads to more clarity and transparency.

**B: Detailed step-by-step guide**

1. This activity begins by asking the participants what they need from co-workers or other people involved (they can be in other disciplines, departments or functions). Everyone involved is invited to respond to those requests.

2. The participants should be divided in 3 to 7 functional clusters. The size of the clusters has no limitation. In the middle of the room are chairs for 3-7 people to sit in a circle. Those 3-7 people take over the function of a spokesperson on behalf of each cluster. The needs and responses are recorded on paper.

3. Each person is part of a functional cluster and everyone has the chance to participate.

4. Process of the activity:

The activity starts by repeating the goal or challenge that is being addressed in this session so that everyone understands the context in the same way. It is important to underline that requests must be explicit and clear, otherwise they might not get an unambiguous response. It is only allowed to respond to an expressed need with yes or no, I will try, and whatever (if the request isn't clear enough). The clusters are being positioned within the room.

One idea is that functional clusters begin with the 1-2-4-All activity to make a list of their main/biggest needs. Those needs should be expressed as requests. For example: "What I

[29] Adapted from Liberating Structures, http://www.liberatingstructures.com/24-what-i-need-from-you-winfy/.

need from you is XYZ". Each cluster selects the two most important needs. A selected spokesperson represents the cluster. The spokespersons come together in the center of the room and present the two selected needs to the other spokespersons. They take notes of the needs without giving responses yet.

Each spokesperson writes down one of four responses to answer each request: yes, no, I will try or whatever (whatever is being selected if the request wasn't clear enough).

Each of the spokesperson reiterates the requests that was made by addressing one spokesperson in the group at a time. The spokesperson will then share the respective responses (yes, no, I will try, whatever).

4. Additional ideas / information

- This activity can be followed up with the W3 activity
- Everyone should feel free to ask for what they truly need to be successful – so encourage everyone to do so!
- If the answer to a request is "whatever" this means that the request hasn't been communicated clear enough - important point to remind the participants.

## 7.18 THE WORLD CAFÉ

1. Short Description

The World Café aims to facilitate collaborative dialogue and knowledge and idea sharing in a creative way through a living network of conversation and action. As the name suggests, the facilitator creates a café ambiance of small groups sitting around tables, which encourages participants to discuss issues and questions. After a specified time, the participants move to a new table, apart from the table host (one host per table), who then recaps the previous conversations to the new table participants. As a result, the following discussions are cross-pollinated with the ideas from previous conversations among other participants. At the end of the process the main ideas are summarised in a plenary session and follow-up actions are discussed. The event lasts a few hours – a minimum of four hours and a maximum of an entire day, depending upon the topic and ambitions of the project (Slocum, 2003: 141).

2. When to use this method?

When you want to:

- ✓ engage large groups (>12 people) in an authentic dialogue;
- ✓ generate input, share knowledge, stimulate innovative thinking and explore action possibilities around real life issues and questions
- ✓ engage people in authentic conversation – whether they are meeting for the first time or have established relationships with each other
- ✓ conduct in-depth exploration of key strategic challenges or opportunities
- ✓ deepen relationships and mutual ownership of outcomes in an existing group
- ✓ create meaningful interaction between a speaker and the audience.

Avoid when:

- x you already have a determined solution or answer
- x you want to cascade one-way information
- x you are creating detailed implementation plans
- x you have fewer than 12 people (instead, use a dialogue circle, council or other approach for authentic conversation)

3. How to use this method?

**A. Brief explanation**

This method facilitates the participants to explore a question by discussing it in small groups in several repeated sessions of 20-30 minutes. Participants change tables after each session in order to cross-pollinate their discussions with the ideas generated at other tables. The event is finalised with a plenary, where the key ideas and conclusions are summarised.

**B. Detailed step-by-step guide**

- Seat four (five max) people at small Café-style tables or in conversation clusters.
- Set up progressive (at least three) rounds of conversation, approximately 20 minutes each.
- Engage questions or issues that genuinely matter to your life, work, or community.
- Encourage participants to write, doodle and draw key ideas on their tablecloths (and/ or note key ideas on large index cards or placemats in the centre of the table).
- Upon completing the initial round of conversation, you may ask one person to remain at the table as a "table host" for the next round, while the others serve as travellers or "ambassadors of meaning." The travellers carry key ideas, themes and questions into their new conversations, while the table host welcomes the new set of travellers.
- By providing opportunities for people to move in several rounds of conversation, ideas, questions, and themes begin to link and connect. At the end of the second or third round, all of the tables or conversation clusters in the room will be cross-pollinated with insights from prior conversations.
- In the last round of conversation, people can return to their first table to synthesize their discoveries, or they may continue traveling to new tables.
- You may use the same question for one or more rounds of conversation, or you may pose different questions in each round to build on and help deepen the exploration.
- After at least three rounds of conversation, initiate a period of sharing discoveries & insights in a whole group conversation. It is in these town meeting-style conversations that patterns can be identified, collective knowledge grows, and possibilities for action emerge.[30]

[30] Taken from: www.theworldcafe.com.

# 8. VISUAL METHODS

The ACT project places a particular emphasis on adopting a co-design practice in its resource development, and especially visual aids, since non-verbal communication is a bridge between varied professional and cultural contexts. Apart from incorporating visual methods and templates within the above participatory methods, ACT also provides guidelines to creating visual materials. This includes infographics, storyboards, and photo documentation.

## 8.1 INFOGRAPHICS

**What is an infographic?**

Infographics are visual representations of information and data through text, images, charts and diagrams. An infographic helps to communicate knowledge and explain concepts clearly and synthetically, and facilitates the understanding of complex issues thanks to visual support and schematization.

The use of infographics can benefit Communities of Practice by helping them to present its activities and outcomes in a quickly, compelling and attractive way. They are a versatile tool to raise awareness, educate and inform very diverse target audiences that improves the visibility of online messages. On the other hand, data-rich visualizations of information increase the engagement and interactions on social media and help people to remember key messages.

The digital nature of infographics means that they can be distributed face-to-face as a springboard and a prop for discussions, as well as online communications.

ADAPTABLE ONLINE

**Tips to prepare good infographics**

The first step to create an infographic is to identify what is the main purpose and the core message to spread: what is the overall question we want to communicate and who is the target audience?

Recommendations to take into account:

- Define an engaging, interesting title for the infographic. To draw the attention of the audience, the title should arouse their curiosity. The title might highlight the relevant conclusions of available data or launch a specific question to the reader.
- Select the content to include and organise the flow of information in the infographic trying to create a story: consider what the key concepts to be highlighted are and the complementary ideas, how elements relate to each other and what the concluding information should be.

- Combine diverse visual elements and avoid long texts. Think of the charts, icons or pictures that might help to illustrate your ideas. Select data considering the most relevant information.
- Show data together with engaging headers and short explanatory texts to give context. Midori Nediger offers in the Venngage blog post "How to make an infographic in 5 steps [Step-By-Step-Guide][31]" several examples of uses of bold, colourful text and icons to bring attention to numerical data and make numbers understandable with little contextual information. The article highlights also different types of charts and pictograms to use depending of what your goal is: comparing independent values (bar chart, column chart or bubble chart); comparing parts of a whole (pie chart, donut chart, pictogram or treemap); or show trends over time or space (line chart, area chart or timeline).
- Use creatively colours, font and font sizes, and select colours with a good contrast in order to facilitate reading.
- Be concise and keep it simple. Prioritize clarity, do not include too much information and leave white spaces; if the infographic is hard to visualize it will be more difficult for the reader to understand the message.
- Include brief references to the information sources and add the relevant hashtags or social media links that help your audience to contact you and find out more information.

**Online tools to create infographics:**

- **Piktochart** (https://piktochart.com) is an online tool which free version offers templates to create simple infographics. It also offers premium plans for education and non-profit organisations with the possibility to access more customizable templates and create interactive charts and maps. Its infographics editor includes a library of free icons and images, and allows to upload your own. Interactive infographics can be inserted with an embed in websites and blogs.

- **Infogram** (https://infogram.com/) is a data visualization and design tool that offers templates for infographics, reports and dashboards, as well as social media. The tool also includes templates of customizable charts to visualize data, which can be inserted in the infographics and other projects.

- **Canva** (www.canva.com) is a drag and drop editor with free access to templates and designs for infographics, diagrams, banners, flyers and social media headers.

- **Creately** (https://creately.com) is a software to create diagrams and flowcharts that allows team collaboration.

- **Venngage** (https://venngage.com/) site with tools to create graphic images for websites, presentations, and social media that includes free templates for infographics.

- **Flaticon** (https://www.flaticon.com) is a large search engine of downloadable free icons and vectors that can be used in both personal and commercial designs. The majority of the

[31] See: https://venngage.com/blog/how-to-make-an-infographic-in-5-steps/

resources can be used for free, provided that the icon is attributed to its author and Flaticon, whereas subscribers to the premium plan can use all icons without any attribution.

- **Pixabay** (https://pixabay.com/) and **Unplash** (https://unsplash.com/) offer free photos, illustrations, and vectors that can be used in altered and non-altered form, with some restrictions regarding images that contain identifiable people or logos. Credit to the image author is appreciated but not required.
- **Flickr** (https://www.flickr.com/) image hosting service that allows to filter by types of license in order to find images tagged as copyleft.
- **Gimp** (https://www.gimp.org/) free software to create and edit images.
- **Font library** (https://fontlibrary.org/): website that contains free fonts to download.

## 8.2 PHOTO DOCUMENTATION

The ACT Communities of Practice will carry out activities such as raising awareness meetings, training sessions, and workshops for exchanging best practices and promoting collaborative learning, which can be documented with the purpose to analyse and synthesize the data collected, share information among CoP members, or openly disseminate the generated outcomes.

This section of the toolkit includes some basic concepts and resources about photography, together with recommendations for CoP facilitators and members of Communities of Practice to photo document their activities and take good quality images to share with general audiences. The suggested guideless are oriented to the use of digital cameras or mobile phones.

**Some technical concepts**

Below we include a summary of the most relevant technical concepts to take into account when capturing an image:

1. Photographic exposure: It is the relation between three elements: shutter speed, aperture of the diaphragm and sensitivity in ISO scale. A correct exposure is important to obtain an image with the correct grain and sharpness.

2. Shutter speed: it allows to modify the time of exposure of the sensor of a digital camera, regulating the time since the shutter opens to let the light pass until it closes. Trepidation is the defect (lack of sharpness, or "moving image") caused by the movement of the objective at the time of shooting.

3. Aperture and F-Stop: together with the shutter speed, aperture affects the amount of light that reaches the camera sensor: a large aperture captures more light than a smaller one. Adjusting the aperture is important to capture right pictures, in order to avoid ghosting images or too dark images. When the size of the aperture is changed, f-stop is the number that the camera shows (it is also known as f-number).

Besides determining the amount of light, aperture also has an important effect in photography: depth of field, which is the distance between the nearest and the furthest objects that are in sharp focus in an image. A larger aperture produces images with a smaller depth of field, such as the photograph of the cup below, where only a small part of the image is sharp while the background is blurry. On the contrary, in order to capture images that are entirely sharp (e.g.; the image of the meeting room below), you need to use a small aperture.

Images by Images by Pexels from Pixabay

4. Sensitivity or ISO scale: Sensitivity is the amount of light that the sensor needs to react and achieve the required density. Like shutter speed and aperture, ISO affects the brightness or darkness of photos. A photo taken at a too high ISO will show a lot of grain and might not be usable. You should avoid high ISOs whenever possible and stick to the lowest native ISO on your camera (known as "base ISO") in order to get the highest image quality[32].

**Point of view and composition**

Point of view in photography means the position from which the camera sees the scene. Deciding on the position we adopt before the subject we are shooting can totally change the photo and how viewers perceive the scene.

Shooting from eye level: the point of view puts the subject on our level. The photo is taken frontally, with the focal plane perpendicular to the ground. This point of view facilitates a more realistic appearance, is less expressive and emotional, and avoids distorting the scene. Shooting from eye level also helps viewers to emotionally connect with the photo subject.

Shooting from above: the point of view is higher and above the photographed subject. This position generates psychological connotations of superiority and control on the scene. Like when shooting from below, this angle gives the space a significant role in the picture. This point of view can be useful to capture images of group work around a table and focus in the object of the discussion (e.g.; capturing the notes that the group is writing down) instead of focusing in participants' faces. Also, shooting from above can be useful to capture images of large groups of people (e.g.; participants in a Conference) or wide spaces in events.

Shooting from below: the point of view adopted is lower than the photo subject. With this angle, the subject seems to be in control of the situation, is more dominant and has more relevance, whereas the smallness and irrelevance of the viewer is emphasized.

Photographic composition refers to how elements are arranged in a picture. It consists on making a decision considering what is our focus of interest, who or what we want to photograph, and creativity criteria. Composition rules can be taken into account for images

[32] To know tips on avoiding image blur read this blogpost by Nasim Mansurov: https://photographylife.com/how-to-take-sharp-photos

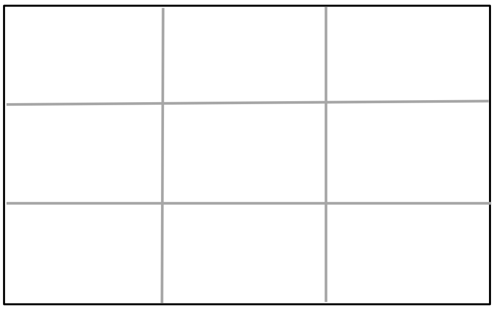
to be harmonic or to emphasize dynamism and contrast. Some essential aspects of photographic composition are listed below:

Point of interest: it is the element which functions as the centre of attention in the picture. It can be a physical point in the image, a specific subject or the vanishing point where all visual lines converge. Centering a subject in the picture is a usual way to draw attention to an individual among a group of people[33].

Lines: Lines help to direct the look and convey sensations, such as calmness, agitation, etc. Horizontal lines usually convey placidity and quietness, curb lines convey softness and movement, while diagonal lines convey dynamism and action.

Rule of Thirds: it is one of the basic rules in photography, frequently used to avoid using central composition and symmetry in all images. It consists on dividing the image into a 3 x 3 grid, three equal thirds vertically and horizontally. In this way, four imaginary lines create four intersection points (see figure below). According to the Rule of Thirds, important elements within an image are placed at these intersection points.

For instance, in the landscape image below, the horizon and the table, as primary subject, are placed along the grid or in one of the intersection points[34].



**General guidelines for photo documenting CoP activities**

- Whenever possible, use a tripod with the camera or the mobile phone to avoid blurring.
- Activate the grid option usually available in mobile phone cameras to help you in defining photographic composition.
- Experiment with the point of view and capture some of the images from unusual angles to increase expressivity.

[33] Detailed information about arranging the centre of interest in photography can be found in: https://www.tiyana.net/principles-of-composition/point-of-view.

[34] Interesting information on alternatives to central composition and the pros and cons of the rule of thirds are included in: https://photographylife.com/the-rule-of-thirds and https://www.tiyana.net/principles-of-composition/golden-ratio/

- Use central composition as a resource to bring attention on the primary subject. Explore also other unconventional, non-centred, unexpected ways to place the primary subjects in the image.
- Shoot not only general scenes, get close and focus in details.
- Include elements in the scene that refer to the project's visual identity when possible (e.g.; by photographing people next to roll ups, posters, flyers or slides that contain the ACT or the CoP's logos).
- Shoot images in RAW format if you want to allow for more technical adjustments afterwards and preserve the quality of the image, or just use JPEG format as a commonly-used and compressed image file format.
- Store image files by adding a meaningful file name and the date of the activity. When uploading the image to the CoP's Photo Gallery, synthesize the file name by including the relevant keywords, so that images are more easily traced by search engines.
- Take pictures of notes taken in flipcharts, wall paper and post-its during workshops and participatory sessions in order to preserve them for analysis afterwards. Do not include personal data or sensitive data in the notes and consider the legal requirements for data protection.
- Inform workshop participants that minutes of the workshop will be taken in order to elaborate a summary report.
- Request for due informed consent of participants to use image in order to make photographs during workshops and publish them afterwards.

**Resources for photo manipulation and image edition:**

- Gimp: free software for photo retouching and image composition which provides tools for both image manipulation and graphic design. It is available for gnu/linux, os x, windows and more operating systems. The website contains a user manual in different languages and tutorials on specific topics[35].
- Pixlr: browser photo editor that offers editing tools for free. It can be used online in desktop or mobile, with no need to be downloaded[36].

**Websites and blogs on digital photography:**

- Digital-photography-tips.net: website with extensive information on photography terminology and useful tips for digital photography. It also compiles recommended tutorials and resources.

- Photographylife.com: site founded by professional photographers Nasim Mansurov and Spencer Cox, which collects articles about photography with contributions from other authors, as well as a forum and tutorials on specific topics.

[35] https://www.gimp.org/
[36] https://pixlr.com/

- IPhone photography school: website funded by Emil Pakarklis and developed by photographers specialised in iPhone photography. Even though it is dedicated to iPhone, it also contains useful tips for mobile photography.

## 8.3 STORYBOARDS

1. Short Description

   Storyboarding can help visually capture the social, environmental, and technical factors that shape the context of how, where, and why people engage with services or policies.

2. When to use this method?

   Storyboards can be used to build empathy for people who are the target audience of a specific policy, and consider design alternatives in the early phases of the design process. This can be achieved by illustrating contextually rich narratives (Hanington and Martin, 2012).

3. How to use this method?

**A. Brief explanation**

Five design practices common to visual storytelling can be harnessed to facilitate storyboards will be presented below:

**B. Detailed Step-by-step guide**

- Simple, abstract drawings of stick figures drawn by anyone are often more effective than artist’s outputs at garnering the attention of the storyboard audience on a specific detail or message.
- Draw with enough context, but not so much that details distract from the purpose of the storyboard.
- Use text to supplement the visuals in a storyboard when it would otherwise take too much effort to illustrate a concept or idea. Add words or thought balloons, captions, or background signs.
- Emphasise people, products, or both: To elicit an emotional impact illustrate characters in emotionally charged situations. If on the other hand the goal is to elicit technical or evaluative feedback regarding the concept, leaving characters out of the panels can focus attention on the details of the design.
- Use between 3 to 6 panels to communicate an idea. Each storyboard should be focused on one salient concept or idea. If more than one concept needs to be communicated, consider creating multiple storyboards that each focus on a different factor.
- Time as a design element should be used to show large time lapses in a scene. Clocks, calendars, zoom-ins of wristwatches, or the movement of the sun in the background can be added to explicitly show the passage of time.
- Construct the story and the storyboard panels depending on what information will resonate with the target audience. For instance, when designing for stakeholders, illustrate the range of potential design opportunities.[37]

[37] Adapted from Hanington and Martin (2012: 170).

4. Additional ideas / information

ADAPTABLE ONLINE

The storyboard outputs can be distributed in face-to-face meetings and presentations, as well as online and on websites.

# 9. ONLINE TOOLS FOR COMMUNITIES OF PRACTICE

As it is not always possible to meet in person, it is very helpful for the CoPs to have other ways and possibilities to communicate, exchange knowledge and experiences as well as to learn and work together. In this section, some tools will be presented which facilitate communication if face-to-face meetings are not possible, or if some exchange is wanted in addition to face-to-face meetings. One of those tools is the ACT Knowledge Sharing Hub that will be further explained in a forthcoming deliverable.

An important part of the activities of Communities of Practice and CoP facilitation will take place online. This section describes the tools included in the online infrastructure that ACT offers to its supported Communities of Practice, which can be used as an alternative to face-to-face activities for collaborative learning, consensus making, knowledge sharing or planning. The detailed tools are part of the services of the ACT Knowledge Sharing Hub, a multisite platform composed of the ACT project website (act-on-gender.eu) and a specific website for each of the supported CoPs, hosted in the same virtual server and domain extension with the CoP acronym (acronym.act-on-gender.eu).

CoPs sites combine some public areas with private sections that are accessible only to registered users (e.g.; files sharing area, forum or video conferencing tool). CoP facilitators will be the admins of their CoP website and able to manage registration requests, so that they will decide who will have access to the private area of the site.

This Knowledge Sharing Hub is built in connection with GenPORT[38]. It offers internet presence for CoPs in its public areas and a workspace for CoP members' collaboration in private sections. The online tools for CoPs collaboration are listed below[39]:

**Forum**

Besides exchanging information in a mailing list, CoPs will be able to hold conversations in a forum page of their site in the form of posted messages around specific threads. The forum tool will be accessible for registered users of the CoP.

For having online discussions beyond the CoP (e.g.; among CoP facilitators and with other CoPs or with groups of people), there is available the space of Groups in GenPORT, a tool that can be used to post requests, suggestions or organise e-discussions on specific topics. A GenPORT group can be private or public, so CoP members decide if the e-discussion and the contents of the group are visible or not[40].

[38] GenPORT (https://www.genderportal.eu/) is an open collaborative internet portal on gender and science resulting from a 4-year project (2012-2016) funded by the 7th Framework Programme for EU research (FP7) of the European Commission.
[39] A detailed description of all services of the technical infrastructure of ACT is included in D5.1 GenPORT+ Knowledge Sharing Hub – Final Specification and Description of Services.
[40] https://www.genderportal.eu/groups

**Poll**

A poll module allows to create and manage polls so that CoP members can capture votes on different topics in the form of multiple-choice questions.

**Video meetings**

To hold online meetings, CoPs sites include a link to the video conference system hosted by DESY. This online conference system has a space for the whole ACT project and a specific meeting space for each of the supported CoPs.

**Files sharing area**

The file sharing area of the CoP is a page only accessible to registered users. It allows to upload/download files and tag them according to meaningful tags. The page allows to filter by tags, by upload user or by upload date.

**Resources**

Unlike the file sharing area, it is a publically visible page that compiles files, recommended resources and available outcomes of the Community of Practice.

**Toolkit**

This public section contains the learning content, participatory methods and tools of the Community of Practice Co-creation Toolkit.

**Webforms**

CoPs sites include the option to create webforms, useful to make short consultations or to register participants' attendance to CoPs' activities.

**Surveys**

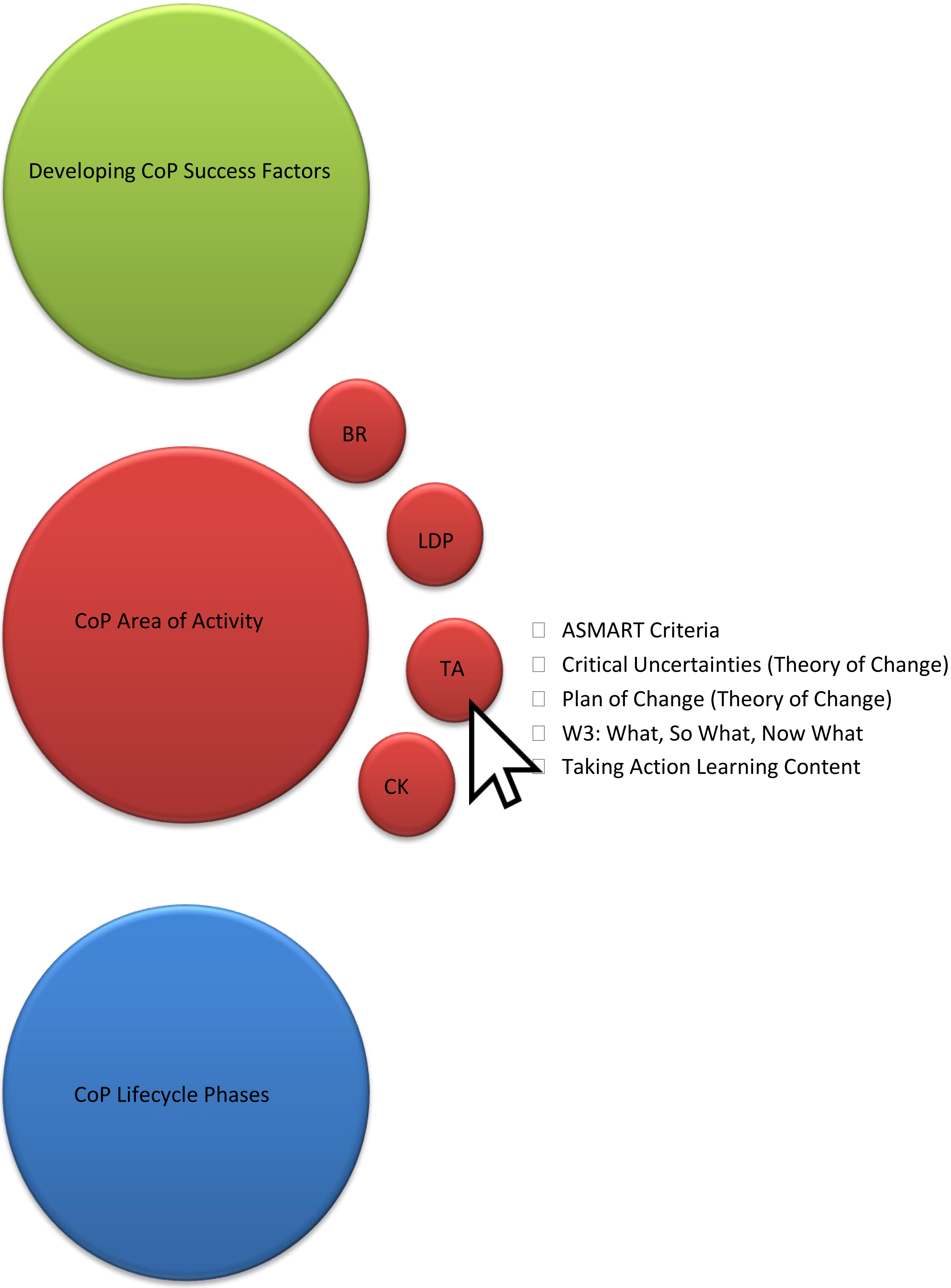
Page that contains the GE Audit and Monitoring tool and Wilder Collaborations Surveys content and guidelines. It includes a link to the LimeSurvey platform, available for carrying out gender equality diagnostics (only accessible to registered users).

**Activities**

The blog page of CoPs sites collects posts on news and events of each CoP. Information published in this blog area is also compiled in the News and Events sections of the ACT website.

# 11. APPENDIX 1

Clicking on each circle would populate a list of factors, areas of activity or phases and then when clicked, resources and tools.



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