COMMUNITY OF PRACTICE CO-CREATION TOOLKIT v.2

www.act-on-gender.eu

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TERMS OF USE

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1. INTRODUCTION

This document presents the ACT Co-creation Toolkit for ACT Communities of Practice (CoP) and their facilitators. It also shows how and with the use of which tools and methods the toolkit can help CoPs operate, develop, implement gender equality plans (GEP), gender equality (GE) measures and activities, and facilitate institutional change in relation to GE in HE and R&I.

This toolkit consists of a theoretical framework, which includes the EIGE roadmap to GEPs, CoP lifecycle phases, CoP success factors, the four areas of CoP activity, and tips for gender equality projects. 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 and documenting methods and online tools.

Especially during the Covid-19 pandemic, the importance of virtual meetings became apparent. New forms of virtual collaboration were needed, which is why a section of this Toolkit is dedicated to the organisation of virtual meetings, supported by the use of co-creation activities. It has become evident, that face-to-face meetings cannot be translated into virtual meetings one-to-one. The section focusing on virtual meetings aims to support facilitating virtual events and creating collaboration, interaction and a sense of togetherness even though personal interaction is not possible.

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 them further. Co-creation in this toolkit thrives on an equal contribution from the participants and from 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 the service system (Frow et al., 2015). As co-creation is founded on participation and collaboration, the ACT Co-creation Toolkit is based on a variety of participatory methods for consensus building, sharing experiences and mentoring.

Given that much communication and idea and 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 structure the online meetings and improve communication, and help to reach your meeting goals. Where activities are adaptable online, there is an icon to identify this.

ADAPTABLE ONLINE

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, strategies, actions and measures in their institutions and across other institutions to improve gender equality, as well as to promote institutional change for gender equality. Therefore, the design of the toolkit is partially informed by the European Institute for Gender Equality (EIGE) guide for establishing a GEP (EIGE, 2019). The suggested six steps in these guidelines will be used as a springboard to identifying and designing the best participatory activities to support CoPs in GEP implementation and institutional change.

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. This toolkit and its methods can also be used by any other CoPs or groups working on gender equality or different topics.

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 (see Figure 1).

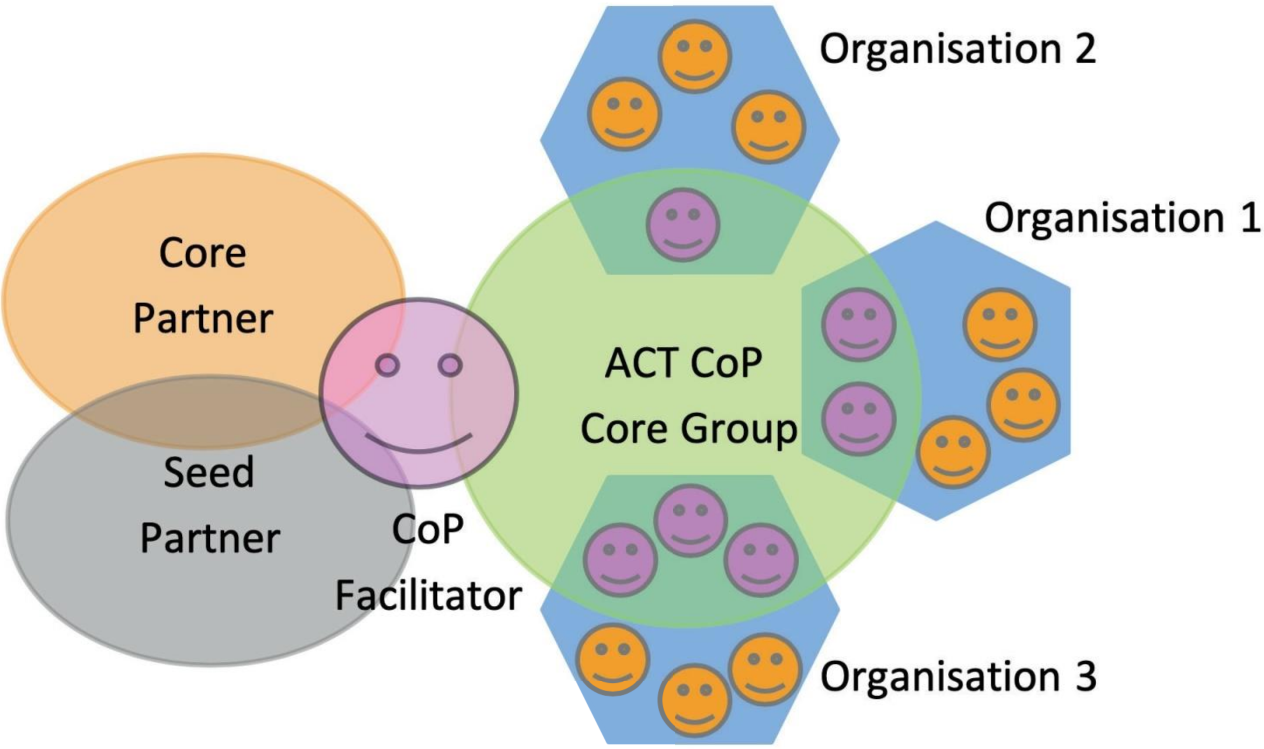


Figure 1. ACT CoP Core Facilitation

WHAT IS THE TOOLKIT'S GUIDING FRAMEWORK?

The choice of the tools is primarily guided by the literature on (see Figure 2):

1. CoP's success factors (various literature);
2. CoP's lifecycle phases (McDermott 2000);
3. CoP's 4 primary areas of activity (Cambridge et al. 2005).

Apart from providing a selection 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 can become aware of which lifecycle stage they are at, what can make them successful, but also what the most important activities in which they can engage their community are.

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

This toolkit is also available online and is designed in the following way:

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 on the webpage 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.

NAVIGATING THROUGH THE TOOLKIT

To help you navigate through the toolkit and quickly choose which method to use, each method description is preceded by an information card.

Each card informs which of the three CoP concepts the method addresses, the size of the group, how complex the method is to conduct, how much time is needed, and how much preparation both you and the participants need. It also briefly describes the methods and highlights the additional resources available (see Figure 3 for an example).

METHOD	EXAMPLE
Area of CoP Activity:	Taking action as a community
CoP Lifecycle Phase:	Design
CoP Success Factor:	Strategy
EIGE Step:	Step 3: Setting up a GEP Step 4: Implementing a GEP
Group Size:	4 groups with 4-6 people each
Difficulty Level:	♛♛♛
Time Needed:	🕙🕙🕙
Facilitator Preparation:	🕮🕮🕮
Participant Preparation:	✎✎✎
Description:	This method can help a group to...
More Information:	www.example.com

Figure 3. Method Information Card

Icon Legend:

Difficulty Level: difficulty of implementation and/or facilitation:

♛ Low

♛♛ Medium

♛♛♛ High

Time Needed: how much time you require to conduct the method:

🕙 Short (up to 1 hour)

🕙🕙 Medium (up to 2 hours)

🕙🕙🕙 Long (up to 3 hours)

Facilitator Preparation: pre-event effort required to conduct the method:

🕮 Low

🕮🕮 Medium

🕮🕮🕮 High

Participant Preparation: pre-event effort required to conduct the method:

✎ Low

✎✎ Medium

✎✎✎ High

2. EIGE GEP GUIDE INFORMING THE TOOLKIT

A roadmap to GEPs implementation 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 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 addresses this.

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

EIGE SIX STEPS GUIDE	SUGGESTED METHODS	
Step 1: Getting started	• 1-2-4-All • Argument Mapping • Brainstorming • Critical Uncertainties • Five-Minute Favour • Four Quadrants • Future Workshop	• Heart, Hand, Mind • How Now Wow • Mature your Ideas • Mentoring Circles • Nine Whys • Lightning Decision Jam • Plan of Change • SMART Criteria • Stinky Fish • SWOT
Step 2: Analysing and assessing the state-of-play in the institution	• Argument Mapping • DAKI • Fish Bowl • Focus Groups • Interview	• Nine Whys • Personas • SWOT and PESTEL • W3 • What I Need From You
Step 3: Setting up a GEP	• Critical Uncertainties • Future Workshop • Lightning Decision Jam	• Plan of Change • SMART Criteria
Step 4: Implementing a GEP	• Critical Uncertainties • Fish Bowl • Focus Groups • Infographics • Photo Documentation	• Plan of Change • Storyboards • What I Need from You • World Café
Step 5: Monitoring progress and evaluating a GEP	• DAKI • Fish Bowl • Focus Groups • Infographics • Interviews	• Photo Documentation • Plan of Change
Step 6: What comes after the GEP	• Brainstorming • Critical Uncertainties • DAKI • Future Workshop • How Now Wow • Infographics • Lightning Decision Jam • Mature Your Ideas	• Mentoring Circles • Nine Whys • Personas • Plan of Change • Stinky Fish • Storyboards • W3

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 selection of useful methods to facilitate this step, such as 1-2-4-All, Argument Mapping, Brainstorming, Critical Uncertainties, Five-Minute Favour, Four Quadrants, Future Workshop, Heart, Hand, Mind, Mature your Ideas, Mentoring Circles, Nine Whys, SMART Criteria, 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. Engaging with the relevant informants and stakeholders is of key importance.

Here, the toolkit suggests methods such as Argument Mapping, Fish Bowl, Focus Groups, Interview, Nine Whys, PESTEL, Storyboards, SWOT and PESTEL, W3, and What I Need From You, among others.

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;
- 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. Taking 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 suggests a number of activities and methods to facilitate this complex step: Critical Uncertainties, Future Workshop, SMART Criteria, Plan of Change, Storyboards.

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

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 (see section about the eight contradictions).

The toolkit contains various participatory activities for these purposes, such as Critical Uncertainties, Fish Bowl, Focus Groups, Plan of Change, Storyboards, What I Need from You, and 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, Interviews, Photo Documentation, and 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, Mentoring Circles, Nine Whys, W3, Plan of Change, and Brainstorming.

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

3. 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; Fontainha and Gannon-Leary, 2008; Jagasia, Baul and Mallik, 2015; Martos, 2012; McDermott, 2002 (Cambridge et al., 2005); Probst and Borzillo, 2008; Pyrko; Dörfler and Eden 2017;	• 1-2-4-All • Fish Bowl • Five-Minute Favour • Four Quadrants • Future Workshop • Heart, Hand, Mind • Lightning Decision Jam • Mentoring Circles • Nine Whys • Stinky Fish • W3 • What I Need from You • World Café
Sharing best practice	Hong, 2017; Probst and Borzillo, 2008; Retna and Ng, 2011;	• 1-2-4-All • Brainstorming • DAKI • Fish Bowl • Five-Minute Favour • Focus Groups • How Now Wow • Infographics • Interviews • Lightning Decision Jam • Mature Your Ideas • Mentoring Circles • Photo Documentation • SWOT and PESTEL • W3 • What I Need from You
Supporting tools and resources	Akhavan, Marzieh and Mirjafari, 2015; Fontainha and Gannon-Leary, 2008; Hong, 2017;	• Five-Minute Favour • Infographics • Mentoring Circles • Personas • Storyboards • SWOT and PESTEL • What I Need from You
Mutual culture, values, belonging	Fontainha and Gannon-Leary, 2008; Martos, 2012; Pyrko; Dörfler and Eden 2017; Retna and Ng, 2011;	• Five-Minute Favour • Four Quadrants • Future Workshop • Heart, Hand, Mind

		• Mentoring Circles • Stinky Fish • What I Need from You
Knowledge production and access to knowledge	Hong, 2017; Martos, 2012; Probst and Borzillo, 2008;	• Argument Mapping • Focus Groups • Infographics • Interviews • Mentoring Circles • Photo Documentation • Storyboards • World Café
Learning	Hong, 2017; Martos, 2012; Probst and Borzillo, 2008;	• DAKI • Fish Bowl • Five-Minute Favour • Focus Groups • How Now Wow • Interviews • Lightning Decision Jam • Mentoring Circles • Personas • SWOT and PESTEL
Leadership	Akhavan, Marzieh and Mirjafari, 2015; Martos, 2012; Retna and Ng, 2011;	• Argument Mapping • Critical Uncertainties • Fish Bowl • Future Workshop • Nine Whys • Plan of Change • SMART Criteria • What I Need from You
Illustrating results and performance	Hong, 2017; Martos, 2012; Probst and Borzillo, 2008;	• Fish Bowl • Infographics • Photo Documentation • Storyboards • W3
Strategy	Akhavan, Marzieh and Mirjafari, 2015; Hong, 2017; Probst and Borzillo, 2008;	• Argument Mapping • Brainstorming • Critical Uncertainties • DAKI • Future Workshop • How Now Wow • Lightning Decision Jam • Mature Your Ideas • Personas • Plan of Change • SMART Criteria • SWOT and PESTEL • W3

Table 2. CoP Success Factors Review

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) as well as mutual engagement and regularity of interaction (Pyrko, Dörfler and Eden 2017) are all linked to the success of the social actors engaged within the CoP and their mutual relations.

Community interaction and communication between the CoP members is 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) also identify communication as a success factor of CoPs. They recommend supporting the communication between CoP members with the help of a facilitator. They also suggest that successful CoPs facilitate communication by for instance providing communication channels. Akhavan, Marzieh and Mirjafari (2015) identified the optimisation of interaction as a success factor of a CoP. This means that if communication and interaction is being facilitated, knowledge can be shared more easily, and it leads to higher dedication and commitment of the CoP members. Probst and Borzillo (2008) argue similarly 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. Hong (2017) argues in a similar way stating 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 recommendation: All of the aspects mentioned above are essential for the success of a CoP because they enable commitment, knowledge sharing and a sense of belonging. Nonetheless, communication and interaction need support from time to time.

SHARING BEST PRACTICE

Sharing best practice leads not only to the development of a successful CoP but fosters economic benefits. 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 more active participation of 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 and share their knowledge among each other. This exchange leads to better effectiveness than one single domain could achieve. Furthermore, Hong (2017) determines that sharing of knowledge results in personal learning and identifying experts, as well as developing best practices.

SUPPORTING TOOLS AND RESOURCES

Supporting tools and resources are identified as a factor of success of CoPs by various researchers and authors. Akhavan, Marzieh and Mirjafari (2015) found 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 also points out the importance of providing the necessary infrastructure and support (Hong, 2017). This could be IT support, communication tools, but also just having the infrastructure to get together, meet and interact. Hong 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). Hong 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 face-to-face regularly or in case of virtual CoPs (Fontainha and Gannon-Leary, 2008). In this case, communication (e.g., online meetings) can be facilitated by communication tools like such.

MUTUAL CULTURE, VALUES, BELONGING

Mutual culture, values, belonging, as obvious as it might seem, form 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 deeper interest and commitment by members to the domain and CoP. Pyrko, Dörfler and Eden (2017), who suggest the most important aspect of a CoP is thinking together, explain that it is a necessity to have mutual engagement. Mutual engagement again stimulates “belonging” which is essential for CoP members to commit and participate in general. Furthermore, they 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 all 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 toward a very similar direction as she states that a CoP needs to create a new and own culture as well as its own values. Furthermore, Sanz Martos (2012) 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 suggest that a sense of belonging is beneficial for the success and health of a CoP.

KNOWLEDGE PRODUCTION AND ACCESS TO KNOWLEDGE

Knowledge production and access to knowledge are discussed by Probst and Borzillo (2008). Their research showed that it is helpful for CoPs to import knowledge from experts outside the CoP. These experts can be from different institutions, organisations as well as various positions (e.g., researchers or practitioners). If experts are 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. Furthermore, they get access to new approaches and can advance their existing best practices. Furthermore, they point out the role of promoting access to other networks. By thinking outside the box and looking beyond boundaries, CoP members get access to other people working on the same problem as well as experts. Contact with people outside the CoP and in other networks have the same effects as mentioned above: Not only does this open access to knowledge but by sharing and exchanging knowledge, ideas and experiences new knowledge is being produced (Probst and Borzillo, 2008). Hong also emphasises the role of knowledge and identifies knowledge and understanding the value of knowledge as a success factor for CoPs (Hong, 2017).

LEARNING

One important aspect for a successful CoP is to keep on learning and to 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 CoPs share ideas, experiences, insights and knowledge which keep the learning process going, as the 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 when knowledge is exchanged in the same organisation. If access to intra-organisational networks is 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 organisation. This aspect implies the importance of learning for the success of a CoP. Knowledge sharing leads not only to learning processes on a CoP level, but also on an individual level and thus to identifying new experts (Hong, 2013).

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 a culture or values. It is also part of the responsibilities of a leader to provide the infrastructure and support needed e.g., premises. It is also fruitful seeing that leaders (e.g., CEO of a company) are committed to the CoP as well. This can inspire employees to follow their example.

Furthermore, if the CEO or the leader is invested in the CoP, they are more willing to provide resources and give the employees the time needed 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 as well. Similar to the arguments of Retna and Ng (2011), Akhavan, Marzieh and Mirjafari (2015) recognise the importance of leadership support. They argue that a supportive leadership leads to optimised interactions. This shows that the different success factors are often interlinked. Hong (2017) also 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.

ILLUSTRATING RESULTS AND PERFORMANCE

Illustrating results and performance aims to have an impact on the motivation of the CoP members (Probst and Borzillo, 2008). The idea is that CoP members can post their experiences in a 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 organisation or company (Probst and Borzillo, 2008). In addition, Probst and Borzillo argue that another way to illustrate results is to subdivide the overall goal or objective into smaller goals and sub-objectives. That allows to see what has been achieved so far (Probst and Borzillo, 2008). In this context, it can also be helpful to evaluate the performance of CoPs. Such evaluations lead to better effectiveness and motivation by showing the strengths and weaknesses of the performance. This leads to an increased effort to improve if the performance has weaknesses, or serves as a push and further motivation if the performance is already strong (Hong, 2017).

STRATEGY

Strategy and long-term goals are discussed as further success factors by Akhavan, Marzieh and Mirjafari (2015). By providing programmes and policies, organisations 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 the research conducted by Akhavan, Marzieh and Mirjafari (2015), having a strategy and specific goals has the highest impact on CoPs.

Probst and Borzillo (2008) state that it helps CoPs if there is a clear and concrete direction to follow. This direction is given by the definition of clear and measurable goals and objectives. They furthermore explain that as part of a strategy it is helpful to divide the objectives into smaller topics and sub-goals that the CoP or its members need to achieve (Probst and Borzillo, 2008).

4. 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 institutionalised as a core value-added capability of the sponsoring organisation (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).

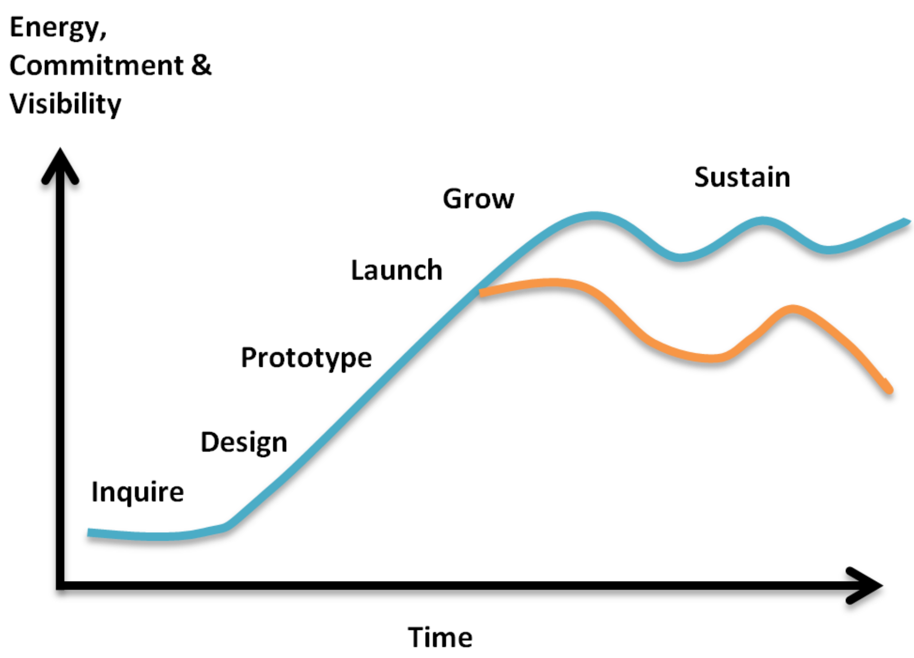


Figure 4. CoP Lifecycle Phases. Adapted from Cambridge et al., 2005.

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.

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	TOOLS	
Inquire	• 1-2-4-All • Argument Mapping • Brainstorming • DAKI • How Now Wow • Fish Bowl • Five-Minute Favour • Focus Groups • Four Quadrants	• Future Workshop • Heart, Hand, Mind • Interviews • Lightning Decision Jam • Mature Your Ideas • Nine Whys • Personas • Stinky Fish • SWOT/PESTEL • What I Need From You
Design	• 1-2-4-All • Brainstorming • Critical Uncertainties • DAKI • Five-Minute Favour • Future Workshop • How Now Wow • Lightning Decision Jam	• Personas • Plan of Change • Reverse Brainstorming • SMART Criteria • Stinky Fish • Storyboards • The World Café • What I Need From You
Prototype	• Critical Uncertainties • Five-Minute Favour • Future Workshop	• Personas • Plan of Change • Stinky Fish • What I Need from You
Launch	• Infographics • Mentoring Circles	• The World Café
Grow	• Argument Mapping • DAKI • Fish Bowl • Four Quadrants • Infographics	• Lightning Decision Jam • Photo Documentation • Mentoring Circles • Storyboards • W3 • The World Café
Sustain	• Critical Uncertainties • DAKI • Fish Bowl • Infographics • Mentoring Circles • Nine Whys	• Photo Doc. • Stinky Fish • Storyboards • SWOT/ • PESTEL • W3

Table 3. CoP Lifecycle Phases and Available Tools

5. COPS' 4 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 (Images by Gerd Altmann from Pixabay).

This area of activity is built on the premise 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 thus encourages a **continuity** and **depth** of **interactions** between members. Therefore, the participative methods should be enjoyable, attractive, fulfilling and rewarding. Moreover, they should help to develop a **shared understanding** of the community's domain and an **approach** to **practice**.

Suggested activities include Five-Minute Favour, Focus Groups, Four Quadrants, Heart, Hand, Mind, Interviews, Mentoring Circles, What I Need From You.

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 facilitates **accessing** the community's knowledge representations for existing practice, and supporting **deeper learning and knowledge sharing** for community members.

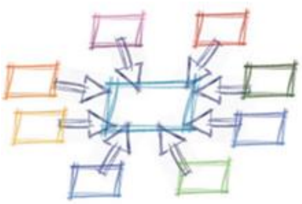
Suggested activities include 1-2-4-All, Brainstorming, Fish Bowl, Five-Minute Favour, Focus Groups, Future Workshop, Interviews, Mature Your Ideas, Mentoring Circles, Nine Whys, Storyboards, SWOT and PESTEL, W3, What I Need from You, and the World Café.

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 facilitates **collaborative efforts**, and **working with others**, but also **recognising** and **rewarding members** for their contributions.

Suggested activities include Future Workshops, Critical Uncertainties (Theory of Change), Mentoring Circles, Nine Whys, Plan of Change (Theory of Change), SMART Criteria, SWOT and PESTEL, W3: What, So What, Now What.



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 Argument Mapping, Fish Bowl, Focus Groups, Infographics, Mentoring Circles, Photo Documentation, Storyboards and the World Café.

BUILDING RELATIONSHIPS	LEARNING AND DEVELOPING PRACTICE	TAKING ACTION AS A COMMUNITY	CREATING KNOWLEDGE
• Five-Minute Favour • Focus Groups • Four Quadrants • Heart, Hand, Mind • Interviews • Mentoring Circles • Stinky Fish • What I Need From You	• 1-2-4-All • Brainstorming • DAKI • Fish Bowl • Five-Minute Favour • Focus Groups • Future Workshop • How Now Wow • Interviews • Lightning Decision Jam • Mature Your Ideas • Mentoring Circles • Nine Whys • Storyboards • SWOT and PESTEL • W3 • What I Need from You • The World Café	• Critical Uncertainties • DAKI • Future Workshops • Lightning Decision Jam • Mentoring Circles • Nine Whys • Plan of Change • SMART Criteria • Stinky Fish • SWOT and PESTEL • W3	• Argument Mapping • Fish Bowl • Focus Groups • Infographics • Mentoring Circles • Photo • Documentation • Storyboards • the World Café

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

6. EIGHT TIPS FOR GENDER EQUALITY PROJECTS

One of the ways you can **prepare yourself and your communities** for accelerating gender equality in their institutions is to raise your awareness about what obstacles and contradictions you may have to face. Joan 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 some projects 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 contradictions in equality projects.

Power	**Roles**
Dual Agenda	**Conflict of Interest**
Power/class	**Timing & Rhythms**
Gender Neutrality	**Ideal Worker Norms**

Figure 5. Acker's eight contradictions in GE projects.

#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. Reward the person in power who was convinced to take action on GE by informing wider community of their actions.

#2: ROLES: Change Agents occupy different roles and may hold less power within an organisation than those who 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.

#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; constantly raise awareness (campaign); report regularly to institutional authority; ethics/RRI as evaluation criteria – creating synergies with ethics goals, RRI goals. *RRI (Responsible Research and Innovation).

#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.

#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. Explain to the manager the benefits of achieving GE goals; get influential allies/stakeholders to convince managers; understand the threat for managers (conflict resolution techniques). Experience shows that organisational change is mostly lip-service but not structural. Focus on structural change.

#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. Consider that there are different timeframes:

- The timeframe of the members' institutions with their own agendas, action plans etc. They began before ACT and they will end after ACT.
- The timeframe of ACT and CoPs: this time is dedicating to sharing, co-designing, creating new knowledge; it is not the time of implementation of GEPs.
- The timeframe of the CoP: the CoP is developed during the ACT project; maybe it will go on after ACT, maybe with another support, maybe not.
- Be realistic in your demand.

#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. **Strategy:** be open about the fact that the rules are always constructed, and they are not simply objective. Disillusionment: empower women facing this challenge; challenge people who claim the rules are objective; acknowledge what we are dealing with; be self-reflective; celebrate the small steps in general; think big, but appreciate the small steps.

#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.

7. PARTICIPATORY METHODS: TIPS & 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 their opinion, with their voices being really heard and to influence the outcome or future activities in their organisation. Most important to keep in mind is to actively involve 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 to the question 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.

General information: To have a successful and fruitful session and to achieve the desired results, there are different things to consider beforehand. This starts with the infrastructure and ends with aspects of feeling comfortable. In the table below the most important things to take into account when organising a session / meeting which includes participatory methods have been collected. The toolkit serves as a source for possible methods and their descriptions. To make it a success it is important though to be willing to work with the framework given by the toolkit and adapting it to the needs of the CoP. It is often necessary to modify and adapt the methods slightly depending on the context, the group and what wants to be achieved as it may not be possible to achieve the desired results if the methods are adopted one-to-one.

This section provides the categorisation of the methods as a quick reference guide, general information, 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 support the CoPs in knowledge exchange, getting new input, strengthening engagement of the CoP members etc.

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

USEFUL TIPS FOR PARTICIPATORY METHODS

Time is a crucial factor when using participatory methods. Therefore, it is helpful to:

- Use an alarm during the use of a method
- Chose a topic based on the time available
- Define timeframes for the different steps of a method

Depending on the method, seating arrangements might need to be changed:

- Do it beforehand so that the session can start right away
- Or invite the participants to do it together as a first step of engagement or as a small energiser

To avoid an unsuccessful session, it is important to prepare all the material needed:

- Which materials are needed to conduct the method?
- It might be possible that participants need additional materials (post-its, pens, marker etc.)
- Even if it doesn't say so explicitly it is always better to have different materials, shapes, colours etc. ready

When many people spend a lot of time in a room it is important to make sure that there is always enough fresh air to avoid participants getting tired and dizzy.

When choosing a location, it is important to consider different aspects:

- Size of the group
- Does the method require special seating arrangements or enough space to split up the group in smaller groups?
- What kind of furniture is needed and how much?

To keep participants motivated it is important to include breaks in the program. Benefits of breaks are:

- Communication and exchange between participants
- Participants can recharge and continue with more energy
- By using short exercising breaks participants will be more awake and active

Another success factor for participatory methods is knowing your target group / participants. Knowing your target group goes along with:

- Adapting the methods to the needs and context of the target group
- Know their level of experience with those formats
- Defining and knowing the desired goals of the meeting / session

NEW

ADAPTABLE ONLINE

8. WEB-BASED APPLICATIONS, ONLINE METHODS, TIPS AND TRICKS

There are different applications that can be used for online meetings (also multiple use at the same time). These tools and applications can support CoP Facilitators in making their virtual meetings as exciting, appealing, and fruitful as possible.

Application	Features	Price	Link
BigBlueButton	✓ Web conference tool for online learning ✓ Live (multi-user) Whiteboard ✓ Polling function ✓ Breakout rooms	**Free**	https://bigbluebutton.org/
BlueJeans	✓ Can be integrated in other platforms (e.g., Slack) ✓ Polling, Q&A, recording ✓ Capturing and sharing meeting highlights ✓ Assigning of tasks and next steps	$10-14/month	https://www.bluejeans.com/
Braincert	✓ Video conferencing tool with integrated Whiteboard ✓ E-Learning platform ✓ Virtual classroom	Prices vary depending on the functions needed	https://www.braincert.com/
GoToMeeting	✓ Conference tool ✓ Transcription of meeting ✓ Personal meeting rooms ✓ Virtual Whiteboard feature	€11-14/month, depending on size	https://www.gotomeeting.com/en-gb
Menti	✓ Build interactive presentations ✓ Collect polls, data and opinions from participants using smart devices ✓ Build word clouds in real time ✓ Get insights on participants with trends and data export	£9-22/month **Free version available**	https://mentimeter.com/
Miro	✓ Virtual Whiteboard ✓ Facilitates collaboration, creation and brainstorming ✓ Helps engaging distributed and/or remote teams	$8-16/month **Free version available**	https://miro.com/

Mural	✓ Virtual Whiteboard ✓ Thinking and collaborating visually, brainstorming together to solve problems, collect ideas ✓ Facilitates fruitful and effectual online meetings/ workshops	$12-20/month **Free version available**	https://www.mural.co/
Samepage	✓ Video conferencing ✓ Real-time working in documents ✓ Managing tasks, projects and calendars	$7.50-9/month **Free version available**	https://www.samepage.io/
Slack	✓ Messaging and video tool ✓ Channels and shared channels (spaces for files, tools, conversations…)	€6-12/month **Free version available**	https://slack.com/intl/en-de/?eu_nc=1
Sli.do	✓ Audience Q&A ✓ Voting ✓ Live polls ✓ Quizzes ✓ Easy code access	£20-150/month depending on options **Free version available**	https://www.sli.do/
Padlet	✓ Make and share content ✓ Add posts with one click, copy-paste, or drag and drop ✓ Changes are autosaved ✓ Simple link sharing allows for quick collaboration	**Free**	https://padlet.com/
Vispa	✓ Virtual Whiteboard ✓ Everyone can contribute ✓ Brainstorming, idea collection, knowledge sharing ✓ Private, collaborative and open spaces	€20/month **8 weeks free**	https://vispa.io/en
Whereby	✓ Meeting platform ✓ Possibility of different rooms ✓ Integration of Open Trello boards, YouTube videos and Google Drive inside rooms to collaborate	$10-60/month depending on size	https://whereby.com/
Zoho Meeting	✓ Meeting platform and webinar solution ✓ Different features (e.g., polling, raise hand, etc.)	$8 meeting platform/month $15-63 webinar solution	https://www.zoho.com/meeting/
Zoom Meetings	✓ Breakout rooms ✓ Built-in collaboration tools	€14-33/month	https://zoom.us/

Things to consider

- In advance, detailed emails to all participants should be sent about how to access, download, and navigate the platforms used. When using multiple applications at the same time, make sure this is made clear and allow plenty of time for participants to familiarise themselves with the online platforms and apps before the session.
- Besides providing information for the participants, it is also very important to familiarise yourself, as the facilitator, with the application you are using. This is especially important when using an application for the first time but it is always helpful to check again before using the application to see if there have been changes through any updates etc.
- Most of the time you will need more time when conducting the toolkit methods online. You should not underestimate that it takes much longer to divide the participants into small groups online and for groups to start working. Also, technical difficulties can occur at all times, so it's good to have some additional time calculated in.
- It is best to conduct any method online when you, the CoP facilitator, feel comfortable and confident conducting. You can ask your peers to test both the online platform and the method you are planning to conduct to get an idea of how everything works.
- In preparation of the session/meeting: have a detailed plan, enough allocated time, prepare clear and quick method explanations, and thought-provoking questions. Explaining a method takes time, as you may get asked further clarifying questions. The more complicated the method the more time you might need.
- Have a physical watch, timer, or stopwatch ready depending on the method. It might be better not to use the PC/laptop applications in case you have too many windows open and then struggle to find it.
- If someone is presenting something as part of an activity or meeting, it is also helpful if one of the hosts or facilitators prepares signs to hold into the camera, indicating the number of minutes left (e.g., one at five minutes and another when there is only one minute left). That way you don't have to interrupt the person that is speaking but can signal how much time is left.
- When working in smaller groups (breakout rooms) ask one person from each group to take notes so that a complete collection of ideas is possible.
- Ask another person (your buddy) to take notes/minutes, so that you can concentrate on facilitating. This person will not be able to fully engage in the activity.
- Your facilitation buddy could also take responsibility for managing the online platform (e.g., the chat box, hand raising, Q&A), and checking any emails that might be sent by participants who have technical issues with joining or using apps.

Photo by Chris Montgomery on Unsplash

Tips and tricks

As opportunities for face-to-face meetings during the Covid-19 restrictions have been and still are likely to be limited, **special attention needs to be paid** to activities aiming at **creating the sense of community and belonging**. This applies of course as well if face-to-face meetings are not possible for any other reasons (e.g., financial or environmental).

Insist on **regular live videoconferences**, in which participants could get more familiar with each other's appearance and nonverbal communication clues.

Think about your **objective**. Is it achievable in virtual reality?

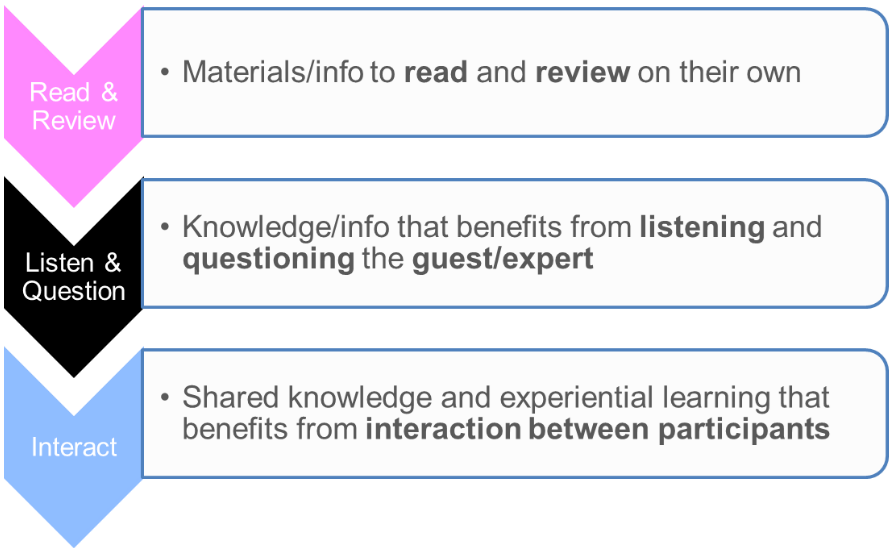
Online participation in some cases might be advantageous. E.g., you can invite more people from anywhere in the world but consider time zones.

Consider inviting **virtual cameo appearances** by GE experts/special guests.

Give participants pre-work to establish **rapport** among the group.

Invite key stakeholders – essential to reiterate the importance/value.

Divide and conquer – think about your objectives and material and divide it into three stages[6]:



Synchronous (S - during) & Asynchronous (A - before or after) participation[7][8]

Design involvement for **before** and **after** the event. This will allow for a continued reflection and sharing materials and thoughts afterwards fosters engagement. It will also free up your limited webinar time and allow you to invest time in getting to know your participants. To help build a rapport, initiate individual exchanges via phone/email beforehand. You can then call upon this rapport during online participation.

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[6] Adapted from: Young, J. (2019). Available from: https://www.facilitate.com/article/11280-designing-interactive-webinars

[7] Adapted from Hrastinski, S. (October-December 2008). "A study of asynchronous and synchronous e-learning methods discovered that each supports different purposes." Educause Quarterly 31(4): 51-55.

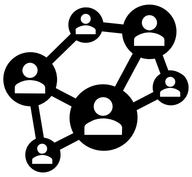
[8] Ardichvili, A. A. (2008). Learning and knowledge sharing in virtual communities of practice: Motivators, barriers and enablers. Advances in Developing Human Resources, 10, 541-554.

Young, J. (2019). Available from: https://www.facilitate.com/article/11280-designing-interactive-webinars

Content	Asynchronous	Synchronous
When	• Reflect on complex issues • When S meetings cannot be scheduled because of other commitments	• Discuss less complex issues • Get acquainted • Plan tasks
Why	• Participants have more time to reflect, because the sender does not expect an immediate answer	• Participants become more engaged and motivated because quick feedback is expected
How	• Email • Discussion boards • Blogs	• Videoconferencing, IM, chat • Complemented with F-2-F meetings

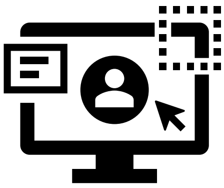
Pre-session connectedness

Good prep means to get THEM and YOURSELF ready and thinking about the material ahead of time and its applicability. It is also useful to get to know each other, open up to sharing and exploring knowledge and ideas, test and use technology to avoid wasting time, and get to know your audience and the relevance of the agenda/plan/topics.



- Find NEW [virtual] ways to establish presence at the “front of the room”
- Express your personality
- Express your value to the CoP Members
- Create trustworthy and enlivened environment to facilitate openness
- You can provide some pre-reading material + pair up participants, ask them to have a 15-minute call about the agenda/materials/content, etc. – accountability and readiness

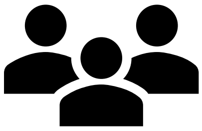
Moderate & Facilitate



- Avoiding presenting or giving a talk
- Keep information push to a minimum
- Ask guest speaker to be interviewed, rather than prepare a speech
- Consider panel discussions
- In large groups, open the microphone to named participants
- Use experts/guests to get a conversation started, then invite participants to build on this
- Summarise all feedback from participants and ask the guest speaker for final comment

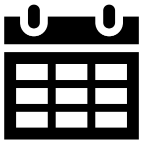
Consider your group size[9]

- **5-10** participants will feel like a conversation round a table, everyone has airtime, can built social capital, share personal stories in a trustworthy, safe space. Many F-2-F methods can be adapted to online participation.
- **10-25** – limited airtime. Share materials beforehand, set up pairs to connect before the event to start engagement early on. Keep track of who is speaking and call on individuals by name periodically to keep everyone's attention.
- **25-50** – connection more distant, less personal. Guest speakers might help focus discussion. You need to tightly facilitate Q&A.



Meetings matter

- Regularly scheduled live online meetings are the core of a virtual CoP.
- Create the rhythm and focus for the CoP.
- Combine meetings with webinars to make the most value of time.
- Meetings are typically scheduled at regular intervals (e.g., first Tuesday of every month).



Example agenda[10]:

- Informal ice-breaker, how do we feel today?
- Review of goals of the project
- Review of meeting or webinar content from previous month
- Check-in with participants on how they are incorporating new strategies or resources in their practice
- Sharing of celebrations and challenges over the month
- Sharing of information about upcoming professional learning opportunities related to the community focus
- Discussion of ongoing information/data collection/research
- "Thankyous" to individuals who shared resources, posted new information or hosted visitors
- Make an archived version of the meeting content available to participants who are unable to attend the live version of the meeting.

[9] Adapted from: Young, J. (2019). Available from: https://www.facilitate.com/article/11280-designing-interactive-webinars
[10] Adapted from: http://www.communityofpractice.ca/encouraging-participation/designing-for-online-participation/

METHOD 1-2-4-ALL

ADAPTABLE ONLINE

Area of CoP Activity:	Learning and Developing Practice
CoP Lifecycle Phase:	Inquire Design
CoP Success Factor:	Community Interaction Sharing Best Practice
EIGE Step:	Step 1: Getting Started
Group Size:	Unlimited
Difficulty Level:	
Time Needed:	
Facilitator Preparation:	
Participant Preparation:	
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.
More Information:	www.liberatingstructures.com/1-1-2-4-all www.vimeo.com/93869810

1-2-4-ALL[11]

Short description

The 1-2-4-All activity engages every individual in searching for answers. The size of the group is not limited for this activity but should be considered when preparing. The key advantage of this method is that we can explore the knowledge and imagination that exists in unknown places or which is yet unseen or undetected by deeply thinking about an issue or a topic solely and together.

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. It also helps finding different approaches and solutions to tackle a problem by thinking together on the same topic and combining ideas and knowledge.

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 on the presented issue/ topic down. In pairs (or small groups, depending on the size of the overall group) the ideas are being shared. In this conversation they may find some mutual themes, new ideas can emerge from the conversation, or their ideas may fit together in a synergy. Each pair then joins another pair (or small group) to discuss the ideas. The discussion in a group of four also facilitates learning and knowledge exchange as well as developing new ideas. After this step, all participants return to a discussion in the whole group and to share their main findings/ ideas.

B: Detailed step-by-step guide

1-2-4-All starts off by asking a question related to the previous presentation of a problem/ issue, or a proposal/ plan/ project that has been suggested. There is no limit on how many people can form part of this activity. However, it is important to keep that in mind when planning this activity because there are things to consider e.g., if there is 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 working in groups of four it might be helpful to appoint a spokesperson that takes notes and presents the main findings in the plenary part of this activity.

This activity starts off with everyone working and brainstorming alone on the presented topic. Next, they pair up and discuss what they have come up with when thinking on the topic alone. It is helpful to write down the main findings, agreements, disagreements, problems etc. to share with the group they are joining next. After working in pairs, they join another pair and, in the end, the whole group works together and the main insights of the work in groups of four are being shared. If the overall group is large, it is possible to change it into 1-3-6-All.

The process of the activity can be described as follows: Each participant starts out by reflecting quietly on a shared experience, challenge or task that has been presented in the beginning. This reflection is based on questions 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 of the ideas that have been discussed was the most prominent one? Every group presents the idea that they find is the most important. If there is enough time, it doesn't have to be limited to just one idea. Especially when the group is big, it is important to limit this part. It is also helpful to ask them to only share new ideas if another group has already presented the same finding. This cycle can be repeated if necessary. The 1-2-4-All activity can also end in the whole group discussing the different ideas/strategies. For the success of this activity and in order to follow through with it until the end, it is really important to keep track of the time and to communicate it clearly to the participants.

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

Additional ideas / information:

- If the group is very large it might help limiting the number of the ideas that are being shared and to include maybe only the top 4 choices into the discussion. On the other hand, it really depends on what the users of this method want to achieve: If the goal is to get new input and as many ideas as possible a limitation would be hindering. But if the goal is to agree on something or to find a solution for one issue then a limitation can be helpful.
- When limiting the number of shared insights, it should not be something that has already been said but a new idea or perspective.
- Using an alarm could help managing the time for the different stages of this method.
- When working in the groups of four it might help to appoint a speaker (especially for presenting the results of the group work).
- Video discussing the advantages https://vimeo.com/93869810

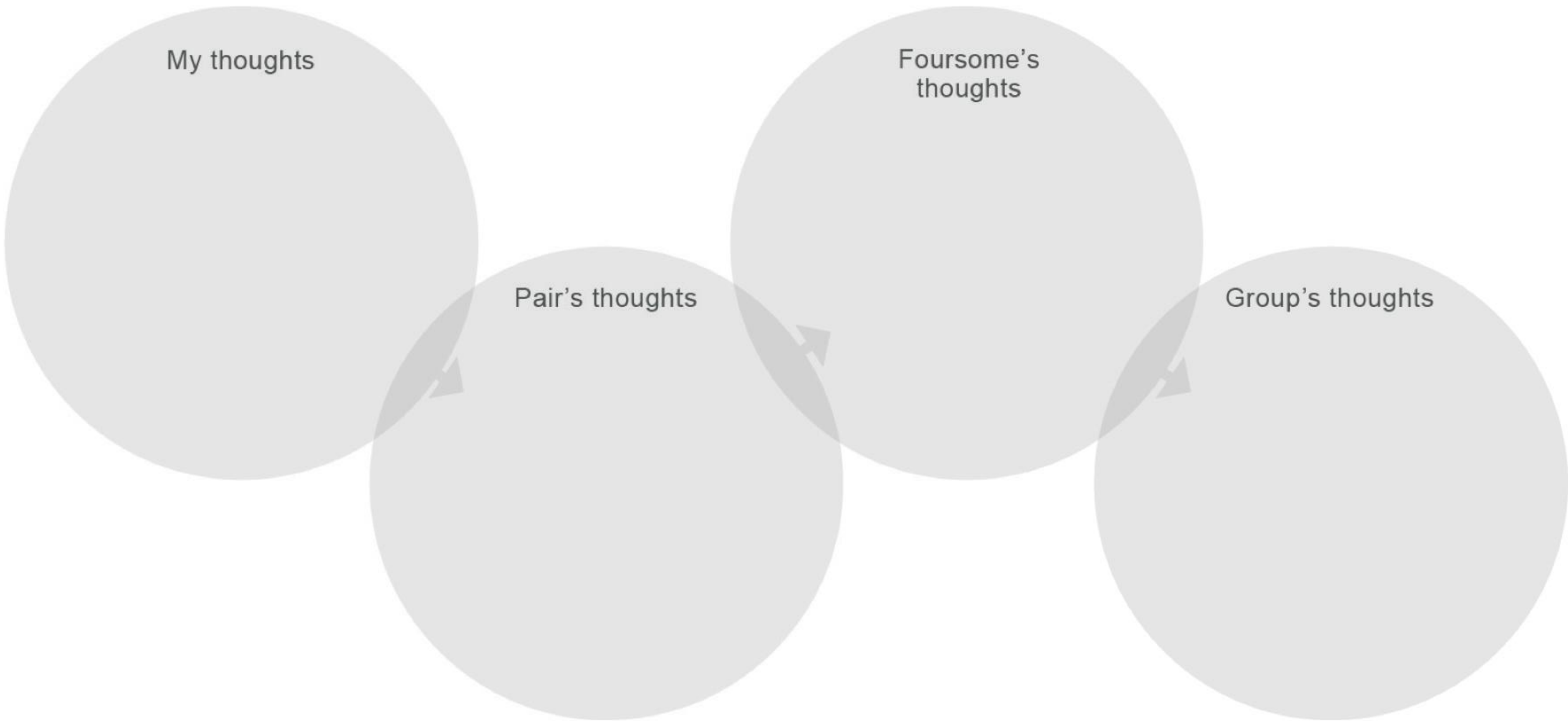
ADAPTABLE ONLINE

This activity can be adapted to online use relatively easy. Without making big changes this method can also develop its full potential when used virtually. There are still a few things the facilitator needs to keep in mind and take care of:

- For this method it is important to provide clear guidance on the time that is available for each step of the method.
- Overall, it might be helpful to plan more time for this activity if it is done virtually. It takes time to set up breakout rooms and to get everyone back to the plenary. This is time that you don't need when working with this activity face-to-face but that should be considered when adapting it to virtual use.
- It is always helpful to make oneself familiar with the application that is being used for the meeting because otherwise that can take up too much time.
- To conduct this activity online, an application is needed that allows the facilitator to split up the group in breakout rooms for group work such as Zoom, GoToMeeting, Vispa, Whereby and BigBlueButton.


1-2-4-All
Thinking Together
What opportunities do YOU see to move forward?
Equal time and opportunity for everyone
Self pairs fours whole group
1 min alone 2 mins in pairs 4 mins in foursomes 5 mins in whole group
Face to face in pairs and foursomes

Template **1-2-4 ALL**



METHOD	ARGUMENT MAPPING
Area of CoP Activity:	Creating Knowledge
CoP Lifecycle Phase:	Inquire Grow
CoP Success Factor:	Knowledge Production and Access to Knowledge Leadership Strategy
EIGE Step:	Step 1: Getting Started Step 2: Analysing and Assessing the State-of-Play
Group Size:	Unlimited
Difficulty Level:	Simple ♛♛ Complex ♛♛♛
Time Needed:	Simple 🕘🕘 Complex 🕘🕘🕘
Facilitator Preparation:	Simple 📖📖 Complex 📖📖📖
Participant Preparation:	Simple ✏ Complex ✏✏
Description:	Two mapping methods are used here to help your community impart critical and analytical thinking, to see relationships between concepts, to structure thoughts, to give a clear and comprehensive overview of arguments, and to help make better decisions: For/Against (Simple) and Argument (Complex) Mapping. The common feature of these thought mapping methods is the use of diagrammatic visualisations in preference to written or verbal descriptions.
More Information:	www.argumentenfabriek.nl/en www.jostwald.com/ArgumentMapping/ www.wisemapping.com

ADAPTABLE ONLINE

ARGUMENT MAPPING[12]

Short description

Thought mapping is widely used for brainstorming, note taking, document drafting, project planning and other tasks that require hierarchical structuring of information. Thought (or mind/concept) maps have a central node (the root) which represents the main topic the map is concerned about. From this root node, child-nodes branch out to describe sub-topics. However, two mapping methods are used here to help your community impart critical and analytical thinking, to see relationships between concepts, to structure thoughts, to give a clear and comprehensive overview of arguments, and to help make better decisions: For/Against (Simple) and Argument (Complex) Mapping. The common feature of these thought mapping methods is the use of diagrammatic visualisations in preference to written or verbal descriptions.

When to use

You can use these methods for a variety of purposes and with wide-ranging stakeholders. These methods are best used when you want to explore people's opinions and ideas about a given issue, but also by using Argument Mapping you can zoom on the reasoning behind their perceptions. These methods can be used to structure a focus group. For example, you can use these methods if you want to explore the perceptions of a particular group (or groups) of stakeholders to provide you with in-depth insights into certain issues and their unique perspectives. If you conduct the same activity among different homogenous groups of stakeholders (junior academic staff versus senior academic staff/ or versus management/leadership), you might be able to illuminate dramatically different viewpoints.

You can use these methods with a diverse group of people (mix), or with homogenous groups, such as:

- Students (under- and post-graduate)
- PhD researchers
- Post-docs, early-career researchers
- Academic staff
- Senior staff/professors
- Management and leadership (strategy, decision making)
- Admin staff
- Service and support staff
- Human Resources staff (recruitment, talent management, staff development)
- Marketing (corporate image, corporate social responsibility, ethics)
- Activists
- Policymakers
- Women's networks
- Lawyers

How to

A: Brief explanation

Use **For/Against Mapping** to illuminate diverse perspectives from your key stakeholders and how they perceive a specific issue:

- What do people think/observe/feel/perceive to be the pros and cons of an issue, etc.?

Use **Argument Mapping** to explicate the inferential structure of arguments, i.e., what the inferences between people's arguments are:

- Why do people think/observe/feel/perceive an issue in this way? How do they make sense of it?

[12] Adapted from Davies (2010) and Beel and Langer (2011)

B: Detailed step-by-step guide

FOR/AGAINST MAPPING (SIMPLE)

This type of mapping allows gathering various considerations on a specific issue and it takes the form of a simple **advantage/disadvantage** contrast. This way of structuring of an issue is clear and can comprehensively capture the perceptions of different stakeholders.

- Collectively with your CoP decide on the central, root issue you want to explore. If the issue is complex, distribute the central question to the participants before the event and let them prepare.
- Plan to use any method contained in this toolkit that suits you, your participants, delivery method (online or face-to-face), and your context to give your session a framework. You can use the **Focus Group** format, **1-2-4-All**, **Brainstorming**, the **Fish Bowl**, or the **World Café**.
- Elicit the for and against arguments according to the rules of these methods. All the above methods can be adapted to online delivery. Please see descriptions of each method in the Toolkit.

ADAPTABLE ONLINE

- Depending on the method you chose, ask your participants to work individually or in groups to initially provide as many arguments for and against a certain goal or key issue, e.g., “more women at senior levels in HE”.
- You can further structure the arguments into categories, such as those listed in **PESTEL** (political, economic, social, technological, environmental, legal – see in the Toolkit), or other ones such as, cultural, managerial, business-case, emancipatory, etc. Alternatively, the categories can reflect the character of the stakeholders, i.e., early-career researcher, policymakers, professors, etc.
- Next, you can also develop the mapping beyond the For/Against and introduce the **SWOT** factors (strengths, weaknesses, opportunities, threats). This will result in a much complex and nuanced product.
- In the next round, link the arguments to evidence (if existing) to prove this point which can then be fed back and discussed. We recommend organising this activity in several rounds with different stakeholder groups (e.g., top management, women’s networks or other diversity advocates, HR, lawyers, etc.), building different but related maps of pros/cons for individuals, teams, organisations, and wider society (if public policy needs to be influenced).
- Breadth vs. Depth: Invite either a wide-ranging group of stakeholders to provide you with rich perspectives in one session (exploration of the breadth); or invite only one particular group of stakeholders in multiple independent sessions (exploration of the depth). The latter version will allow you to compare the depth sessions in-between the groups later.
- Collect the outputs either during the session on the flipchart (or virtual whiteboard if online) or project them from your laptop, or ask someone to prepare comprehensive notes and then convert them into visual representation of the group outputs and distribute after the event.
- This exercise can highlight important points raised by minority stakeholders that would have been otherwise missed or illuminate fallacies in argumentation if no evidence for certain opinions is found. This might be useful in tackling resistance to institutional change.

See examples: www.argumentenfabriek.nl/en.

You can use free software www.wisemapping.com to visualise your results for dissemination and decision making. This website allows you to trial the software log-in free, and you can also use it fully for free.

For the full map see: https://www.argumentenfabriek.nl/media/1985/11144-schaliegaswinning-s.pdf

Figure 6. Argument Map "Shale Gas Production" by Argumentenfabriek (2012)

B: Detailed step-by-step guide

ARGUMENT MAPPING (COMPLEX)[13]

The result of this type of mapping is a spatial representation of arguments that allows us to visualise their logical structure. Such maps help to clearly see how each part of an argument relates to every other part: how a main conclusion is supported by reasons, which in turn are supported by their own reasons, which in turn are supported by their own reasons, and so on (see example below).

Argument maps illustrate this logical structure in box-and-arrow form. Once arguments are translated into map form, you can identify unstated assumptions, recognise invalid claims, and assess the truthfulness of conclusions.

You could use this method **independently**, or as a **follow up** of the **For/Against Mapping** to dissect certain problematic arguments and flesh out the reasoning behind them with a specific group of stakeholders. This will allow you to illuminate the reasons critically and analytically behind certain beliefs, fears, stereotypes, etc. This in turn will enable you to demonstrate unreasonable/illogical/uncritical thinking behind certain arguments and claims.

Use **Argument Mapping** to explicate the inferential structure of arguments, i.e., what the inferences between people's arguments are: Why do people think/observe/feel/perceive an issue in this way? How do they make sense of it? This method might be effective in preparing participants to deal with resistance towards gender equality projects in their organisation. As this type of mapping is complex, it is best to keep the organising method as simple as possible. Therefore, it is recommended to use group work for this activity:

- Before the event, assess how much time you have and how much time you need. Plan accordingly: For shorter periods (up to 1 hr), it is best to have a pre-prepared CONCLUSION, and participants familiar with the method (asynchronous preparation).
- Explain the method and the rules of the mapping. It might be effective to email the participants before the event, so that they can familiarise themselves with the complex rules of this method.
- Have a pre-prepared provocation statement (CONCLUSION, see Fig. 7) or elicit a provocation from participants through brainstorming prior to starting this activity.
- Divide participants into groups of 3-4. Ideally there should be a minimum of 2 groups to work on supporting and opposing arguments. For **online facilitation**, ensure you work with a platform that offers breakout rooms.

ADAPTABLE ONLINE

- Ask 1-2 groups to work on developing REASONS (Fig.7) to support the CONCLUSION; and the other group(s) to focus on developing OBJECTIONS, and possible REBUTTALS.
- Allow the participants to work in groups for 15-30 minutes depending on the time available.
- Bring the participants out of groups (or breakout rooms) into a plenary session to share their outputs.
- Use a flipchart/virtual whiteboard to record the REASONS and OBJECTIONS/REBUTTALS. If using a virtual platform, you can either decide to take control of the whiteboard and record the inputs yourself or ask each group to contribute (virtual whiteboard editing by participants must be possible).
- The end-product can be then saved and distributed to participants.
- The co-created syntax will allow participants to anticipate the kinds of arguments they may experience from people in their organisations who resist or oppose institutional change towards gender equality. Having ready-made arguments will be helpful to deal with resistance and for building a convincing rationale for GE projects.

[13] Adapted from Ostwald (2007).

Definitions of key terms:

Argument

It is a claim and reason(s) to believe that the claim is true.

Conclusion

A belief, the main point and argument is trying to prove,

e.g., “women should be promoted to top positions”.

Reason

Evidence in support of the conclusion,

e.g., “women are underrepresented in top positions”

Co-premise

Is the subset of reason and every reason has at least two co-premises? Each co-premise must be true for the reason to support the clam.

Objection

A “reason” that a claim is false, evidence against a claim.

Rebuttal

An objection to an objection.

The Syntax of an Argument Map

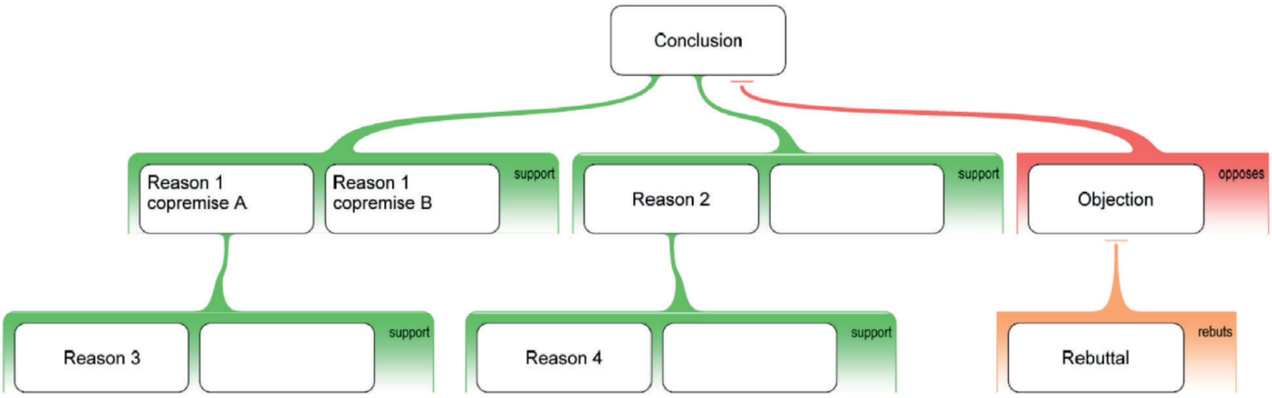
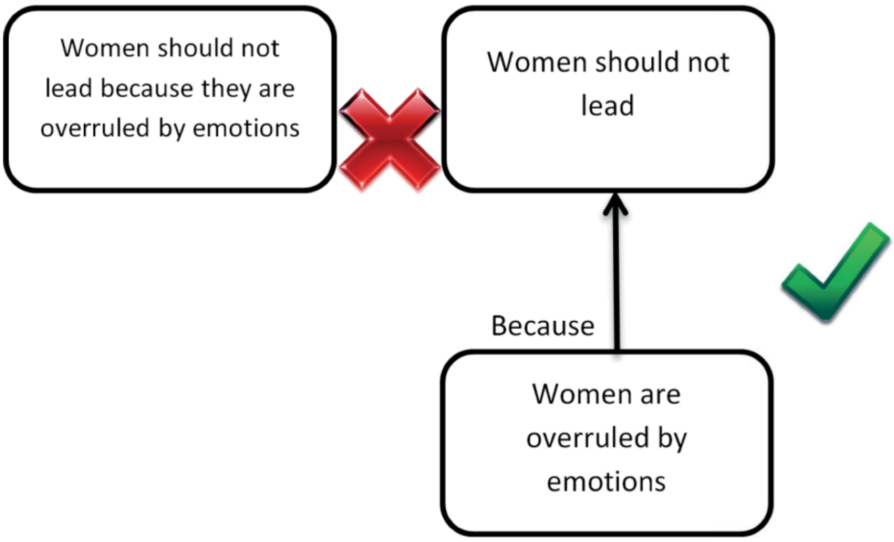


Figure 7. The syntax of Argument Mapping - the basics (Ostwald 2007). Reproduced with the author's permission.

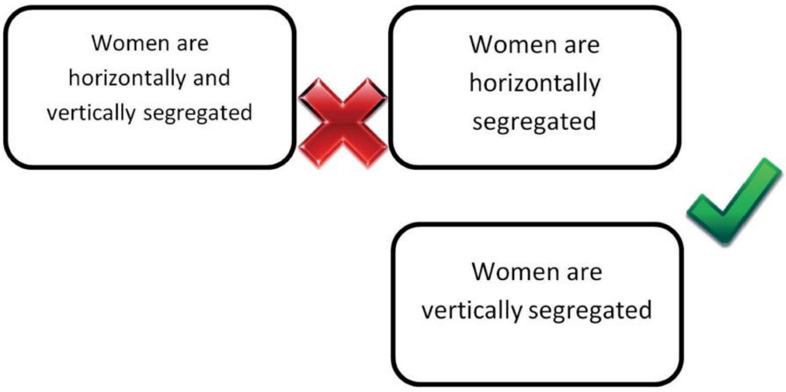
There are certain **rules** that have to be followed to enable you to conduct Argument Mapping consistently and clearly:

1. Each box contains only one **declarative sentence** and should be declaring something, taking a position (true or false). For example, "organisations should adopt women in top managerial positions", or "women are overruled by emotions at work".

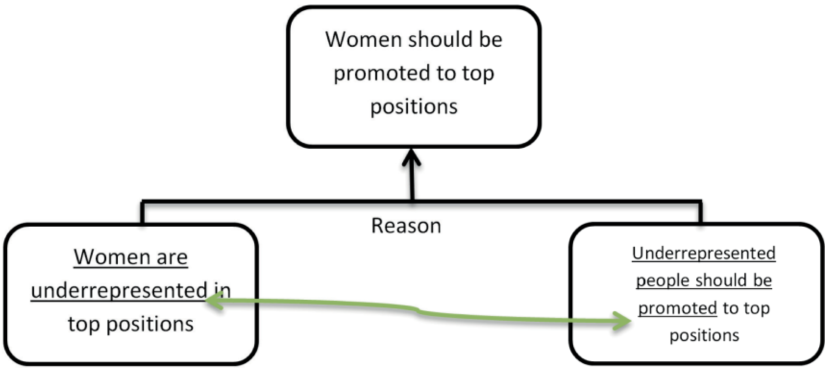
2. Each box should only contain a single claim and **no reasoning**. The reasoning should be included in a separate box linked to the claim with an arrow.



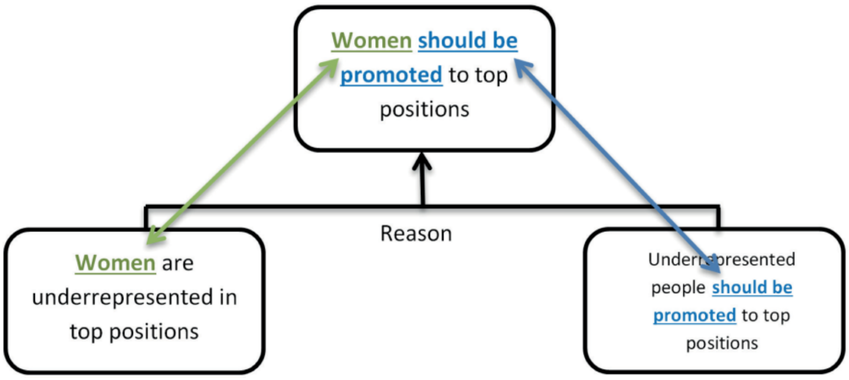
3. Each box can only have **two main terms**, so that each box can be either true or false.



4. All reasons for claims must answer the **assertability question**, i.e. "How do we know that [insert claim] is true?"
5. Within each reason, a term stated in one co-premise must be mentioned in one of the other co-premises in that same reason (if it is not in the claim above it – see the Rabbit Rule below). In this way the terms are **Holding Hands** within a single reason.



6. The last rule is the **Rabbit Rule** ("You can't pull a rabbit out of a hat"), which is applied vertically, between a claim and each of its reasons. It is also combined with the Holding Hands rule. Use these two rules for each simple argument to ensure that every term mentioned in each box is found in one of the others.



Additional ideas / information

More resources and further examples and explanations are provided by Jamel Ostwald (www.jostwald.com/ArgumentMapping/).

Example:

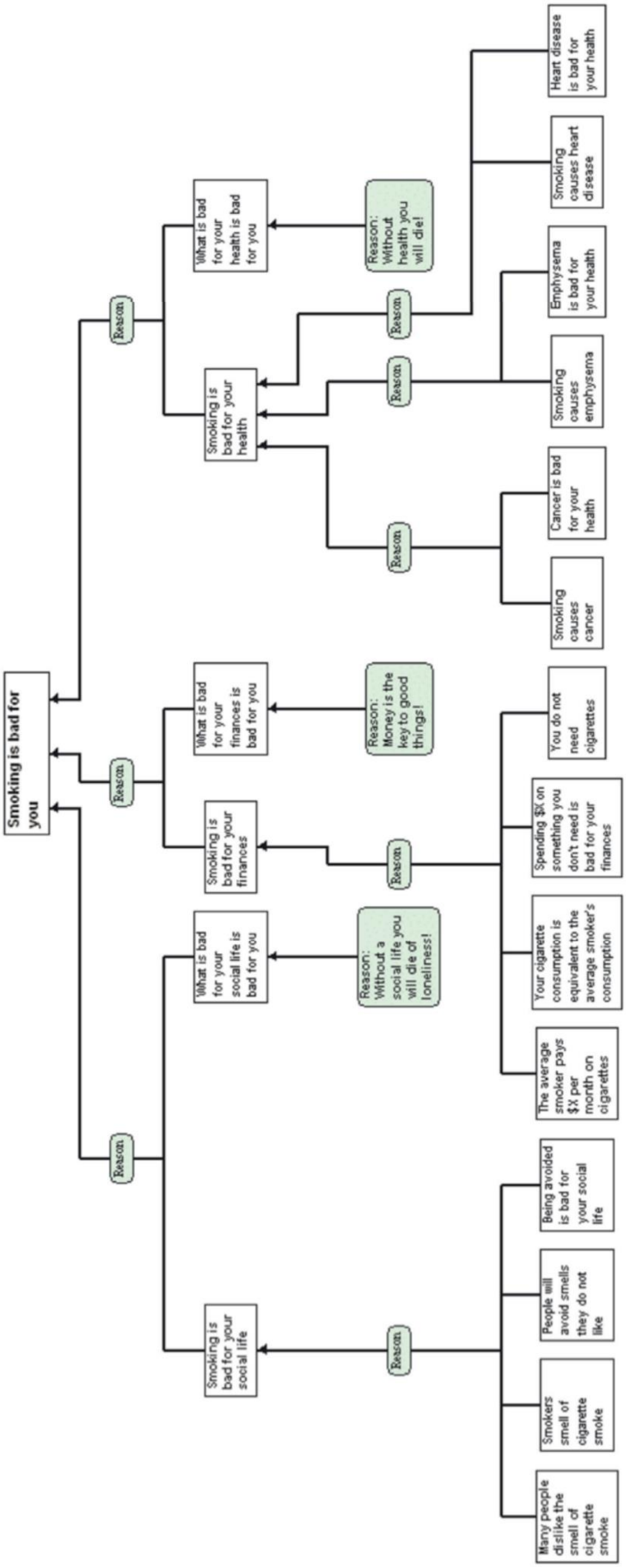


Figure 8. Smoking is bad for you (Ostwald 2007). Reproduced with the author's permission.

METHOD	BRAINSTORMING
Area of CoP Activity:	Learning and Developing Practice
CoP Lifecycle Phase:	Inquire Design
CoP Success Factor:	Community Interaction Sharing Best Practice Strategy
EIGE Step:	Step 1: Getting Started Step 6: What Comes After the GEP
Group Size:	3-6 people per group
Difficulty Level:	
Time Needed:	
Facilitator Preparation:	
Participant Preparation:	
Description:	Brainstorming sessions can take many different forms, however here we curate three methods. The first two use standardised templates to be filled out by participants answering one or several rounds to given challenges. Facilitators have the option to then lead the grouping of ideas, as a second step (see Mature Your Ideas).
More Information:	www.betterevaluation.org/en/evaluation-options/roundrobin www.conversational-leadership.net

ADAPTABLE ONLINE

BRAINSTORMING[14]

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 have the option to then lead the grouping of ideas, as a second step (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.

When to use

You can use this method when you want to not only share knowledge about a subject but also deepen it with 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 experiences together. It increases the diversity of explored ideas, so that better solutions to the problems can be found. Brainstorming can help participants to bond, as they are part of a team collaborating in a safe environment.

How to

A: Brief explanation

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

B: Detailed step-by-step guide

THE OPEN BRAINSTORM

- Break a large group of people to smaller groups of 3-6 people and present them with a development question for idea generation. The challenge is either **pre-defined** (you already have it) or **to be defined** together with the participants (you do not have it yet and need to brainstorm what the problem/challenge is). 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 5-10 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 to the development question.
- This brainstorm is adaptable online. Instead of physical sheets and post-it notes, you could create a shared document to which the participants can contribute, or use the template PDF (available on the CoP websites) for screen sharing and collective editing. Alternatively, the facilitator collects all ideas either verbally one-by-one or asks the participants to send them a message via 'chat' to collect 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, such as Adobe Connect, or Zoom.

ADAPTABLE ONLINE

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

THE CLOSED BRAINSTORM[15]

This variant of brainstorming is effective for generating and developing ideas whilst building on the consecutive contributions of each person. This brainstorm is not adaptable online, as the template sheets change hands throughout the activity. This type of brainstorming is based on the “round robin” method and has the benefit of eliciting ideas from quieter participants. It provides each person an equal chance to voice their thoughts and suggest their ideas without pressure.

- Write a development question on a post-it note and stick onto each sheet and give each participant post-it notes in a colour different to the central question.
- Place the participants around a table so that they can exchange the template sheets with their neighbour.

ROUND 1:

- Step 1 – Seat your participants together around a table. Break a big group into smaller ones (max. 6 to fit the template). Give each person post-it notes to record their ideas individually.
- Step 2 – Explain the specific problem that you want to collectively resolve. What do you want to achieve today? What is the point of the meeting?
- Step 3 – Distribute the template to everyone in the group(s), so that each person is holding their own template. Get each participant, in silence, to think of one idea as a solution to the development question, and write it down on a post-it note (1 min).
- Step 4 – Next, get each participant to pass their template with the idea to the person next to them (clockwise). Everyone should now be holding a new template with their neighbour’s idea.
  Step 5 – Get each participant to use their neighbours’ idea as inspiration to create another idea and write it down. Then ask each participant to pass the template they hold with the new idea to the person next to them to repeat step 4. As the ideas are added, the amount of time has been increased, because it will be more difficult to continue coming up with new ideas.
- Step 6 – Continue this cycle until the template reaches the person who started it (Person 1).
- Step 7 - Gather all the templates and collate them, remove duplicates and discuss them further in an open session.

ROUND 2 and 3:

You could conduct as many or as few rounds as you wish, rather than three. It depends on how much time is available.

Additional ideas / information

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, and the difficulty level of the problem.

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

REVERSE BRAINSTORMING[16]

NEW

Short description

This reverse brainstorming technique is an engaging and provocative alternative to the conventional brainstorming session. It is engaging because it encourages the participants to think the unthinkable and imagine a reality that is undesirable, disappointing, and negative. It is provocative because it forces the participants to let their imagination run in a counterintuitive way and think the opposite of what they would normally be asked to imagine. For example, conventional brainstorming would start from asking “How do we achieve our goals?”, but here we would start from “How do we ensure we completely fail?”. Paradoxically, the task of thinking why and how and why something will fail can be more fun and harness deeper imagination and thinking outside the box, as humans have a natural ability to identify problems more easily than solutions.

When to use

This method is especially helpful to generate new ideas and to build consensus, but through exploring the future or reality that is unwanted first, rather than an idealistic vision. As with the conventional brainstorming varieties, this method also offers opportunities for exchanging knowledge and information between various people so that more knowledge and new perspectives are generated. Use this method to enthuse your participants if you feel the traditional brainstorming did not bring the expected outcomes, or to surprise your participants if you suspect they are disengaged or bored of standard methods that are frequently used in many workshops. It brings out creativity and imagination by harnessing negative energy, such as cynicism, sarcasm, and hostility.

How to

A: Brief explanation

Start by asking reverse, provocative questions, and then move on to a process of prioritizing the answers and coming up with **antidotes**, i.e., things/actions to do to ensure the imagined failures do not happen.

B: Detailed step-by-step guide

1. Explain the process. Break a large group into smaller groups of 4-5 (breakout rooms online) and present them with a ‘reversed’ development question for idea generation. The challenge is either **pre-defined** (you already have it) or **to be defined** together with the participants (you do not have it yet and need to brainstorm what the problem/challenge is). The development question should be written on a post-it note and put in the middle of the poster (Mural, etc., template provided). When designing your question, ensure it can challenge thinking and stimulate imagination in the opposite way to what you want to achieve. Some examples:

   ✓ *How do we ensure our project is misunderstood?*
   ✓ *How do we ensure that our gender equality plan fails?*
   ✓ *How do we ensure that we get a lot of resistance?*
   ✓ *How do we ensure that we don’t get any resources for our future work?*
   ✓ *What do we do to have this project blocked by top management?*
   ✓ *How do we ensure no one wants to work with us?*
   ✓ *What are the most innovative and creative strategies to disengage our key change agents?*

2. The group generates ideas on the question for about 10 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 to the development question. Encourage the participants to be as outrageous and destructive as possible. (10 min)

[16] Adapted from Conversational Leadership: An online book by David Gurteen. Available from https://conversational-leadership.net/reverse-brainstorming-cafe/

3. Ask one person from each group to share their ideas with the other groups (ask for a volunteer, if online); or ask people to wander around the room and look what other groups have written down. (10 min)
4. Ask each group to identify the top three ideas of their post-its. (10 min)
5. Invite each group to share their ideas and allow them to briefly explain each item. (10 min)
6. Ask the participants to now think about the top three items and come up with three antidotes to them. For example, three things that need to be done well to ensure that their project is understood; or that the gender equality plan is a great success.
7. Ask each group to share their items and allow then to give a few more words of explanation behind each. (10 mins)
8. Finally, invite the participants to share their experiences and insights from the session in their group (use breakouts). Then bring them back together to the main online space (if online) and have a large group conversation about the session and what they have learned. (20 mins)
9. This brainstorm is adaptable online. Instead of physical sheets and post-it notes, you could create a shared document to which the participants can contribute or use the template PDF (available on the CoP websites) for screen sharing and collective editing. Alternatively, the facilitator collects all ideas either verbally one-by-one or asks the participants to send them a message via 'chat' to collect 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, such as Adobe Connect, or Zoom.

   ADAPTABLE ONLINE
10. Timings are a guideline only and at 90 minutes total for about 30 people the time might be tight. Two hours would be a better allocation of time, especially if it is conducted online. This process works best with about 30 people (6 groups x 5).

Templates

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

Template THE OPEN BRAINSTORM

	DEVELOPMENT QUESTION (post-it note)	

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

Template 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)			

METHOD	CRITICAL UNCERTAINTIES
Area of CoP Activity:	Taking Action as a Community
CoP Lifecycle Phase:	Design Prototype Sustain
CoP Success Factor:	Leadership Strategy
EIGE Step:	Step 1: Getting Started Step 3: Setting up a GEP Step 4: Implementing a GEP Step 6: What Comes After the GEP
Group Size:	4 groups with 4-6 people each
Difficulty Level:	♕♕♕
Time Needed:	🕙🕙🕙
Facilitator Preparation:	🕮🕮🕮
Participant Preparation:	✎✎✎
Description:	Critical Uncertainties can help a group to see if they have critically considered their course of action. This will enable them to later develop a strategy. This activity is about being able to imagine the best and worst scenarios of an activity and to think about how to best respond to unforeseen events and changes.
More Information:	www.liberatingstructures.com/30-critical-uncertainties/

CRITICAL UNCERTAINTIES (THEORY OF CHANGE)[17]

Short description

Critical Uncertainties is a method based on the theory of change that can help a diverse group of people to see if they have critically considered their course of action. It also helps to develop a better response to challenges that might wait in the future. This will enable your group of people to later develop a strategy. The aim of this activity is not to create an implementation plan. It is about being able to imagine the best and worst scenarios of your activity and help you to think how to best respond to unforeseen events and changes. This includes being able to see the different ways in which future can evolve, managing expectations and accepting that there might be different scenarios of your actions.

When to use

Critical Uncertainties helps to see if current thinking is viable, practical and above all critical. This is being facilitated when uncertainties are defined and recognised. The overall goal is to make sure that everyone is able to adapt in the case of a rising uncertainty, as well as being able to prioritise. Finally, this method should help to build up confidence in managing unanticipated future.

How to

A: Brief explanation

The participants of this activity think of the most fatal uncertainty they might face or are actually already facing in their organisation or project team, which might prevent them from working successfully and reaching their goals. In small groups, strategies are being developed to help to avoid those uncertainties or to prepare some coping strategies and mechanisms. If the issue is complex, distribute the central question to the participants before the event and let them prepare.

B: Detailed step-by-step guide

1. Divide all your participants into 4 groups. Each group receives a printed temple (ideally A3 format), or a blank flip-chart paper sheet, post-its, flipchart stands, etc. All the participants take responsibility for planning a strategy and everyone has the chance to contribute.
2. All the participants (all together not in groups) are asked to identify and describe the **two** most critical uncertainties in their organisation, project, or plan. The question asked in this context could be:

In your project, what two factors seem to be difficult to foresee or control?

Ensure that the selected factors are BOTH critical and uncertain. For example, early career researchers could suggest that one of the most critical uncertainty facing their career is the **quantity** of research projects and the resultant publications they will be able to take part in, given their busy schedule teaching and supervising their students:

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

Critical Uncertainty 1: The quantity of research publications.
This uncertainly is critical because, scientific career relies on rich publishing.

However, the second critical uncertainty is the **quality** of the publications. It is crucial for their career that the outputs are published in well-regarded journals:

Critical Uncertainty 2: The quality of research publications.

3. Next, a grid with two axes, X and Y, with a "more of" and "less of" continuum for each of the factors on each axis is being established for **both the critical uncertainties**. In doing so, four quadrants will originate (see Example Template). For example:

Weak Publications (low quality) versus Strong Publications (high quality)

and

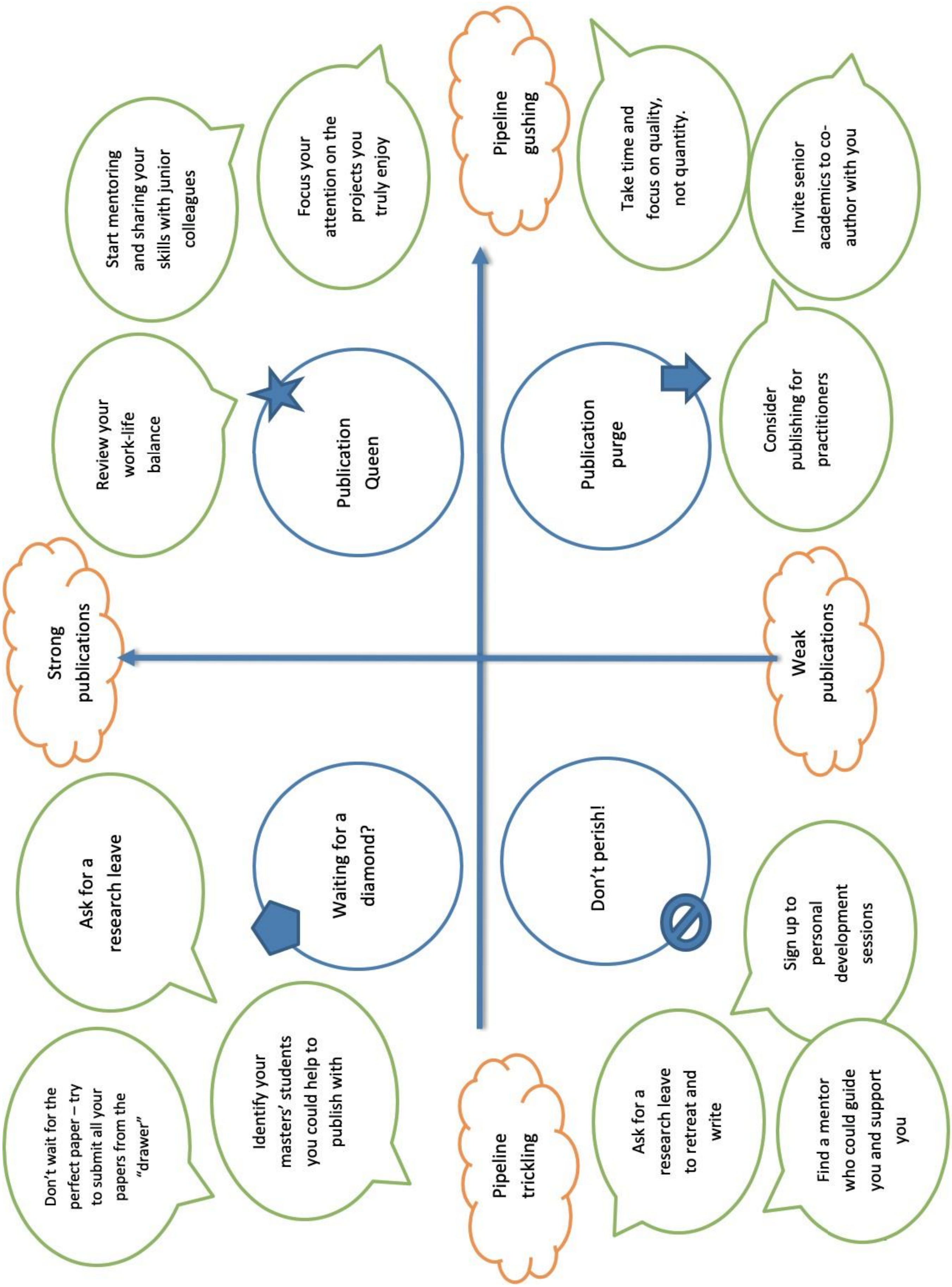
Pipeline Trickling (low quantity) versus Pipeline Gushing (high quantity)

4. Each group names one of the four quadrants and writes a short sketch/story/scenario about it and comes up with a catchy name (see the blue circles in the example template). After that, the four groups present their scenarios to the rest of the participants.
5. Each of the groups then thinks of three strategies that could be used in the one scenario they have been working on (see green speech bubbles in the example template). Those strategies are then shared with everyone on a flipchart or sheets fixed to the wall with blue tack.
6. At the end, the whole group discusses and identifies which strategies are the most practical and effective ones and which probably will not lead to success. Pooling all the different scenarios in the end enables everyone to learn about possible strategies in different situations.

Additional ideas/ information

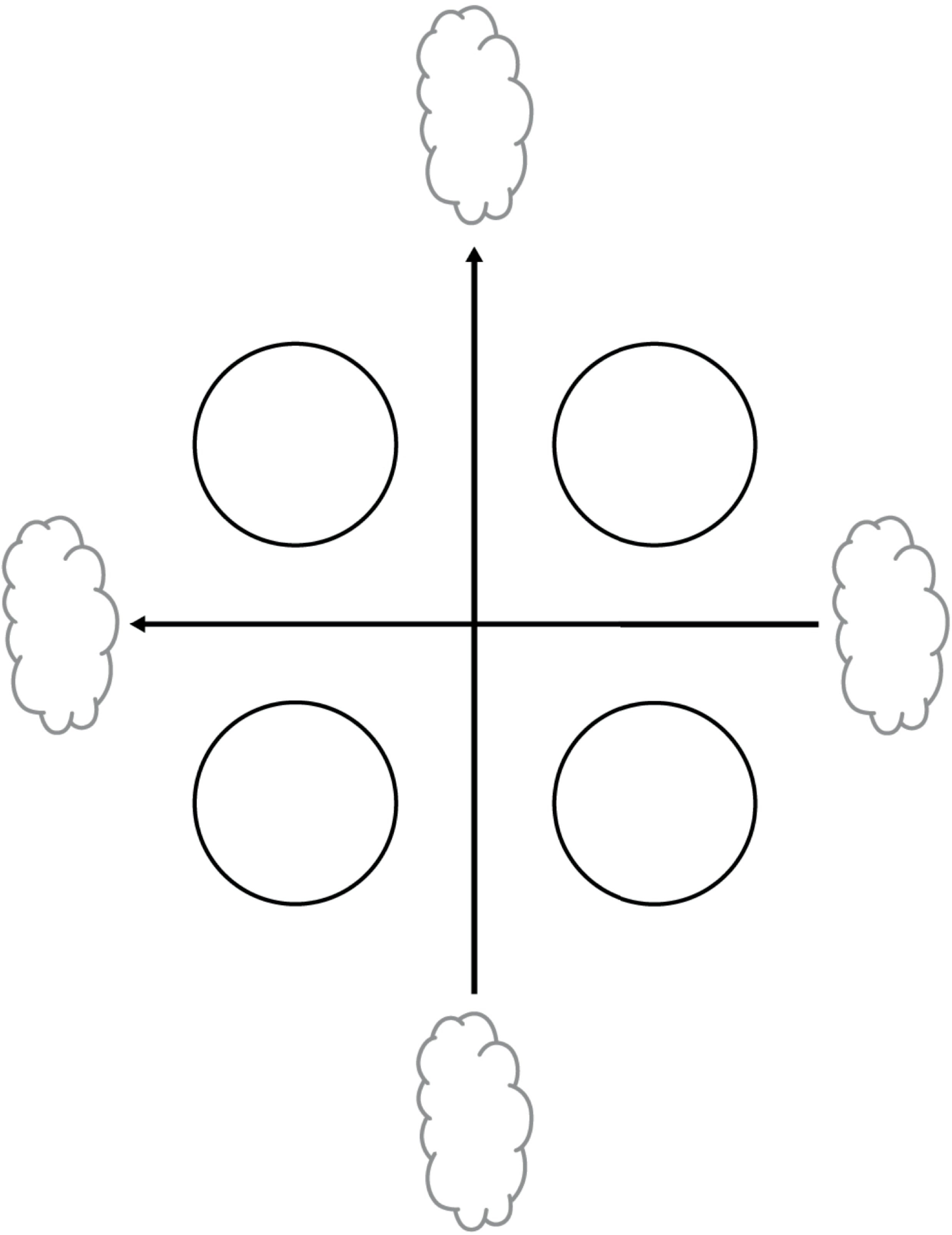
When thinking about the different uncertainties, it helps to remind the group of moments/events/scenarios that they did not expect and moments in which they were not prepared.

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


Pipeline gushing
Pipeline trickling
Strong publications
Weak publications
Publication Queen
Publication purge
Waiting for a diamond?
Don't perish!
Start mentoring and sharing your skills with junior colleagues
Focus your attention on the projects you truly enjoy
Review your work-life balance
Take time and focus on quality, not quantity.
Invite senior academics to co-author with you
Consider publishing for practitioners
Ask for a research leave
Don't wait for the perfect paper – try to submit all your papers from the "drawer"
Identify your masters' students you could help to publish with
Sign up to personal development sessions
Ask for a research leave to retreat and write
Find a mentor who could guide you and support you

Template

CRITICAL UNCERTAINTIES



METHOD	DAKI RETROSPECTIVE (DROP ADD KEEP IMPROVE)
Area of CoP Activity:	Learning and Developing Practice Taking Action as a Community
	ADAPTABLE ONLINE
CoP Lifecycle Phase:	Inquire Design Grow Sustain
CoP Success Factor:	Sharing Best Practice Learning Strategy
EIGE Step:	Step 2: Analysing and assessing the state of play Step 5: Monitoring progress and evaluating a GEP Step 6: What comes after the GEP
Group Size:	Unlimited
Difficulty Level:	
Time Needed:	
Facilitator Preparation:	
Participant Preparation:	
Description:	DAKI is an activity to assess and evaluate certain aspects of a project or the value of current practices. It looks at what went well and what didn't. Based on that, participants decide which activities to keep and improve, which should be stopped, and which might be helpful to add.
More Information:	https://www.teamretro.com/retrospectives/daki-retrospective/ http://www.funretrospectives.com/daki-drop-add-keep-improve/ https://funretro.io/daki-drop-add-keep-improve/

DAKI RETROSPECTIVE (DROP ADD KEEP IMPROVE)[18]

NEW

Short description

By evaluating the value of certain activities or practices, DAKI retrospectives supports groups in prioritising those practices that are of high value and to drop those, that are not. Furthermore, DAKI retrospective helps groups to see and understand the ideas of others. This activity enables groups to decide by themselves what is working for them and what is not.

When to use

This activity is most effective when using it later in the process of a project or implementing measures as it helps to evaluate what has been working well and what has not. A good time could be after finishing a task or reaching a certain interim goal. The activity then allows participants to look back at it and to see what should be kept for the future, what is missing, what did not work well and needs to be improved or dropped.

How to

A: Brief explanation

The basic idea of this activity is to assess a certain practice based on the four variables 'Drop', 'Add', 'Keep' and 'Improve'. This can be done by drawing a matrix on a flipchart or – if the meeting is virtual – by using a whiteboard tool. The participants get a couple of minutes (around five, depending on your schedule) to think about the comments regarding the four variables and to write them down on cards. After shortly explaining their comments, they pin their cards on the flipchart or pinboard in the square to which it belongs ('Drop', 'add', 'Keep', 'Improve'). Similar comments can be merged, so that there are no unnecessary repetitions.

B: Detailed step-by-step guide

-The base of this activity is a 2x2 matrix (see example below), which should be prepared on a flipchart or whiteboard. Each one of the resulting squares represents one of the DAKI variables:

> Drop (top left): Things that should be put in this square are practices that didn't work well, practices that worked but didn't add value to the process or activities that take up too much time. Basically, everything that keeps the group from reaching their goal.
>
> Add (top right): It might occur that in the process things come up that need new practices or innovative ideas. Those should be placed in this square.
>
> Keep (bottom left): Things that worked well and that people liked will be kept for future activities.
>
> Improve (bottom right): This variable addresses those things, that people like but could not try yet (e.g., a specific methodology) or they might not have worked as planned. It can also refer to specific areas that people would like to work on more.

-After explaining the meaning of the matrix and its squares, the participants get five minutes (this can be adapted depending on how much time you have) to think about comments/ ideas for each of the variables.

-Participants now get the chance to explain their comments shortly (if you are on a tight schedule, you can always limit the number of comments per square and participant) and to pin them onto the corresponding square.

-If several participants have the same or similar comments, they should be merged to make further discussion easier.

-If the number of comments/ ideas is still too large, you can let the participants vote (e.g., five votes per participant).

-Based on the comments and ideas that are now left, you can discuss the next steps, responsibilities and concrete actions.

---

[18] https://www.teamretro.com/retrospectives/daki-retrospective/
http://www.funretrospectives.com/daki-drop-add-keep-improve/
https://funretro.io/daki-drop-add-keep-improve/

-It is always helpful to save the doc, the flipchart or whiteboard with the results of the session, to be able to compare it with the next DAKI retrospective and to monitor the progress.

This activity is adaptable and can be used in online meetings as well. The matrix can be easily shared with others via a doc, Whiteboard or Mural. There are several websites offering this service as well, such as FunRetro. Participants can work simultaneously or one after another, depending on which tool you choose. Another option is that one person is responsible for adding the comments of the participants to the matrix. Participants can let the facilitator know either verbally or via chat what to write down and where to put it. Beyond that, the activity follows the same steps like doing it face-to-face.

ADAPTABLE ONLINE

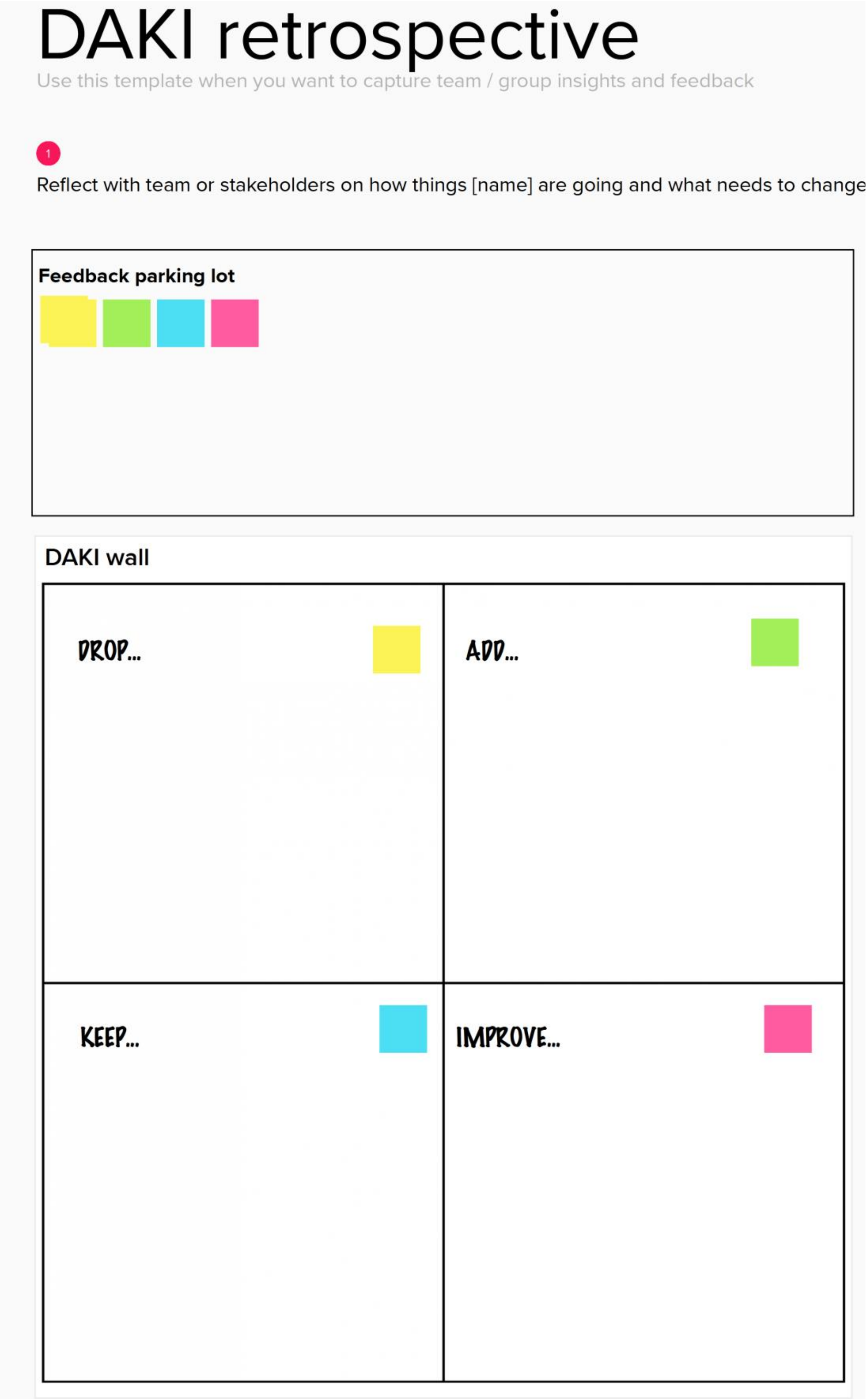
Additional ideas / information:

- It might be helpful to set time limits (e.g., for the brainstorming part of the activity) to have more time for discussing the outcomes of the DAKI retrospective.
- If the number of comments in each square is too big even after merging similar comments, participants can be asked to vote (e.g. each participant has 5 votes) and thereby limiting the number of comments.
- When conducting this activity online, it might be helpful to inform participants prior to the meeting which platform or tool you would like to use, so that they can have a look at it and how it works.

Template and example:

Template **DAKI RETROSPECTIVE**

DROP	**ADD**
KEEP	**IMPROVE**



DAKI retrospective template example in Mural

METHOD	FISH BOWL
Area of CoP Activity:	Creating Knowledge Learning and Developing Practice
CoP Lifecycle Phase:	Inquire Grow Sustain
CoP Success Factor:	Community Interaction Learning Leadership Sharing Best Practice Illustrating Results and Performance
EIGE Step:	Step 2: Analysing and Assessing the State-of-Play Step 4: Implementing a GEP Step 5: Monitoring Progress and Evaluating a GEP
Group Size:	Unlimited
Difficulty Level:	
Time Needed:	
Facilitator Preparation:	
Participant Preparation:	
Description:	Fish Bowl method is a dynamic alternative to classic discussion formats such as panel discussions as everyone can participate rather than only an exclusive group of people. It includes small rounds of talks in major events and brings vitality as well as spontaneity in conventional activity and event formats.
More Information:	www.partizipation.at/fishbowl-en.html www.debonogroup.com/six_thinking_hats.php

ADAPTABLE ONLINE

FISH BOWL[19]

Short description

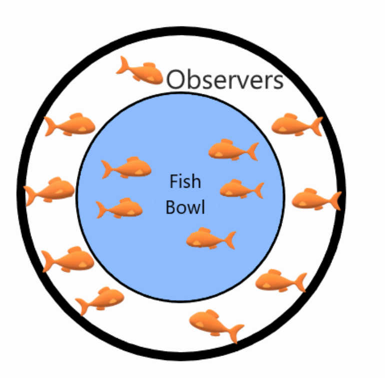
Fish Bowl method is a dynamic alternative to classic discussion formats such as panel discussions. In this activity, everyone can participate rather than only an exclusive group of people. It includes small talking rounds in major events and brings vitality as well as spontaneity into conventional activity and event formats.

When to use

Fish Bowl is a helpful and supportive method for the presentation of group results and to dispute questions and provocations, 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. It is also a good alternative to a standard plenary discussion when working with a large group.

How to

A: Brief explanation



Fish Bowl consists of two circles of chairs: The inner circle consists of 4 to 6 people (depending on the overall size of the group) and the outer circle contains the observers. Sometimes, if the group is large there need to be more outer circles around the inner circle of 4-6 people. Usually there should be more observers than the participants in the "fish bowl" One chair in the inner circle remains free and everyone from the outer circle can join if they want to actively engage in the discussion. If someone of the inner circle doesn't want to participate anymore, one is free to leave the inner circle at any time. Only people in the inner circle can talk whereas the rest of the group listens and can participate by moving into the inner circle. One person should moderate this session, to keep it structured and to support the flow of the discussion. One person should also take minutes of the discussion to write a summary in the end. Depending on the group size it might be helpful to have several people taking notes so that nothing gets lost.

B: Detailed step-by-step guide

- If the issue is complex, distribute the central question(s) to the participants before the event and let them prepare.
- Participants sit in a small circle of chairs (in the "fish bowl") in the middle of one or several larger circle(s) of chairs (depending on the group size) with the observers. Only the "fish in the bowl" are allowed to speak in the form of a discussion. People from the outer circle listen but can join the inner circle at any time to take over an active part of 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 their place, which leads to a continuous change without disturbing the flow of discussion. This dynamic prevents a stagnation of the discussion.
- The facilitator moderates the discussion and if they feel necessary or fruitful, they can guide the flow of the discussion by suggesting also their own point of view. However, we would recommend that the facilitator stays outside both circles to keep the circle dynamics stable.
- Fish Bowl does not have a specific ending point. It might help to define a timeframe (e.g., 45 minutes for discussion). Fish Bowl can end by asking for feedback from the outer circle on what has been discussed in the inner circle (this can be done verbally or by using a feedback form).
- It is also helpful if someone keeps the minutes of the discussion in order to wrap this method up with a short summary. This can be then circulated to the participants.

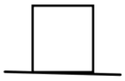
Additional ideas / information

- The question for discussion should be so open that it can lead in different directions. It might be helpful to phrase the topic as a provocation or provocative statement (causing a strong reaction) in order to start the discussion.

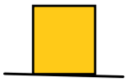
[19] Adapted from Participation & Sustainable Development in Europe, https://www.partizipation.at/fishbowl-en.html.

- You could send your central question/focus to the participants beforehand to allow them to think of different arguments and ideas, but this is not necessary.
- 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.
- To make the Fish Bowl even more creative it could be implemented in the form of a theatre play and to assign each seat a different role to include various perspectives. The role of the seat stays the same even when someone else is taking the seat. This person then needs to adapt this role / position. Role examples: The Optimist, The Pessimist, The Devil's Advocate, The Emotion, The Reason, The Fact, etc.

- You could also get inspiration from Edward De Bono's Six Thinking Hats[20]. You will then need to have a big enough group to have 6 chairs (hats) and enough observers to create a good rotation of ideas:

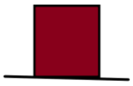


The White Hat calls for information known or needed. "The facts, just the facts."

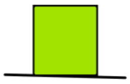


The Yellow Hat symbolises brightness and optimism. Under this hat you explore the positives and probe for value and benefit.

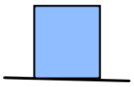
The Black Hat is judgment - the devil's advocate or why something may not work. Spot the difficulties and dangers; where things might go wrong. Probably the most powerful and useful of the Hats, but can be a problem if overused.



The Red Hat signifies feelings, hunches and intuition. When using this hat, you can express emotions and feelings and share fears, likes, dislikes, loves, and hates.



The Green Hat focuses on creativity, the possibilities, alternatives, and new ideas. It's an opportunity to express new concepts and new perceptions.



The Blue Hat is used to manage the thinking process. It's the control mechanism that ensures the Six Thinking Hats® guidelines are observed.

- To use Fish Bowl virtually, an online meeting space is needed (Zoom, Zoho meeting, Vispa, Whereby, GoToMeeting, BigBlueButton, Slack, Braincert or Samepage). Depending on the number of participants not every application can be used depending on their limitations. Most web-based applications, have a "raise-hand" function that might be helpful for participants to signal their interest in joining the inner circle. If you are using **Zoom**, you can use the camera function effectively to assign the 'fish' (those who speak):

  - Step 1: Everyone needs to switch on the "Gallery View" (top right corner)
  - Step 2: Everyone apart from the speakers switches cameras off.
  - Step 3: Everyone needs to "Hide Non-Video Participants". When in Gallery View, right-click on any participant that either has their video off or dialled in via telephone, or click on the 3 dots at the upper right of their participant box.

ADAPTABLE ONLINE

Alternatively, ask the participants to have a post-it note ready with the word "fishbowl" written on it. Invite 3-5 volunteers to "join" the fishbowl, while the rest of the participants stay on mute and listen as the observers. The participants within the fishbowl display 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 observers 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.

[20] http://www.debonogroup.com/six_thinking_hats.php

METHOD	FIVE-MINUTE FAVOUR
Area of CoP Activity:	Building Relationships Learning and Developing Practice
CoP Lifecycle Phase:	Inquire Design Prototype
CoP Success Factor:	Community Interaction Sharing Best Practice Supporting tools and resources Mutual Culture, Values, Belonging Learning
EIGE Step:	Step 1: Getting started
Group Size:	Unlimited
Difficulty Level:	
Time Needed:	
Facilitator Preparation:	
Participant Preparation:	
Description:	The idea behind the Five-Minute Favour is that small things and acts to help and support can have large value to others. This activity gives everyone the chance to ask other people in the group for help, feedback, experiences ideas.
More Information:	www.medium.com/refresh-blog/the-five-minute-favor-77c6fb321ecb www.youtube.com/watch?v=YyXRYgjQXX0 www.giveandtakeinc.com/blog/culture/the-five-minute-favor/

ADAPTABLE ONLINE

FIVE-MINUTE FAVOUR[21]

Short description

One of the ways to build a strong community is to add high value to others' lives at a low personal cost. Doing one five-minute favour every day for someone can instil in us a habit that benefits you more than just the beneficiary. It can challenge people's assumption that they have to choose between helping others and their own success. This quick activity will allow people to find ways of giving to others that do not demand enormous acts of sacrifice. Sharing knowledge, experiences or ideas take only five minutes but can help others and will pay off in many ways. The Five-Minute Favour also helps to make asking for support easier, more normal, and even encouraged. Bringing community members together to help each other has the potential to enrich their abilities to achieve their goals while building a stronger sense of team spirit and community. These favours can broaden and deepen your community's relationships and inject greater meaning and satisfaction into the project.

When to use

This method can be used in the beginning or throughout a project, task or other form of collaboration. You can use this activity officially during one of your online webinars or face-to-face sessions, but encourage your community to practice this activity every day when possible to progress your project. You can ask the participants before the event to think what they need help with, so they come up with useful, specific, and clear ideas for favours.

How to

A: Brief explanation

The Five-Minute Favour allows participants to ask for one five-favour and invite volunteers to help them achieve their goal or solve their problems.

B: Detailed step-by-step guide

Arrange your group in a circle and ask them to take turns to express what they need help with, e.g. "I have a difficulty in finding quality resources about gender budgeting", or "I need someone to retweet my community's recent achievement". Other ideas can concern the following:

- Sharing of knowledge, best practice
- Introducing to an individual who might help
- Providing constructive feedback
- Providing a relevant reference for a person, project, or plan
- Sharing, commenting or retweeting something on social media
- Writing a short, specific laudatory note to recognise or recommend someone on social media

This activity can also be adapted to online communication. Instead of asking the favours face-to-face this can easily be done online without changing and adapting the activity. For this activity you only need a meeting platform like Zoom, Zoho meeting, Vispa, Whereby, GoToMeeting, BigBlueButton, Slack, Braincert or Samepage. No special application with features is needed.

ADAPTABLE ONLINE

A good start for this activity – whether conducting in virtually or face-to-face – is to watch the TED talk by Adam Grant[22] who explains the idea, benefits and possibilities of those five-minute-favours.

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[21] Adapted from Grant (2013) and Anderson (2013): https://www.forbes.com/sites/kareanderson/2013/07/17/pay-it-forward-with-the-five-minute-favor/#776e88f76f5d

22 https://www.youtube.com/watch?v=YyXRYgjQXX0

ADAPTABLE ONLINE

METHOD	FOCUS GROUPS
Area of CoP Activity:	Building Relationships Learning and Developing Practice Creating Knowledge
CoP Lifecycle Phase:	Inquire
CoP Success Factor:	Knowledge Production and Access to Knowledge Learning
EIGE Step:	Step 2: Analysing and Assessing the State-of-Play Step 4: Implementing a GEP Step 5: Monitoring Progress and Evaluating a GEP
Group Size:	4-12
Difficulty Level:	♕♕♕
Time Needed:	🕙🕙🕙
Facilitator Preparation:	🕮🕮🕮
Participant Preparation:	✎✎✎
Description:	Focus Group is a planned discussion in a small group (four up to twelve people) of stakeholders moderated by a facilitator. 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.
More Information:	Slocum, N. 2003. Participatory Methods Toolkit: A Practitioner's Manual: http://archive.unu.edu/hq/library/Collection/PDF_files/CRIS/PMT.pdf.

FOCUS GROUPS[23]

Short Description

Focus Group is a planned discussion in a small group (four up to twelve people) of different stakeholders moderated by a facilitator. 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).

When to use

You should use Focus Groups when you want to:

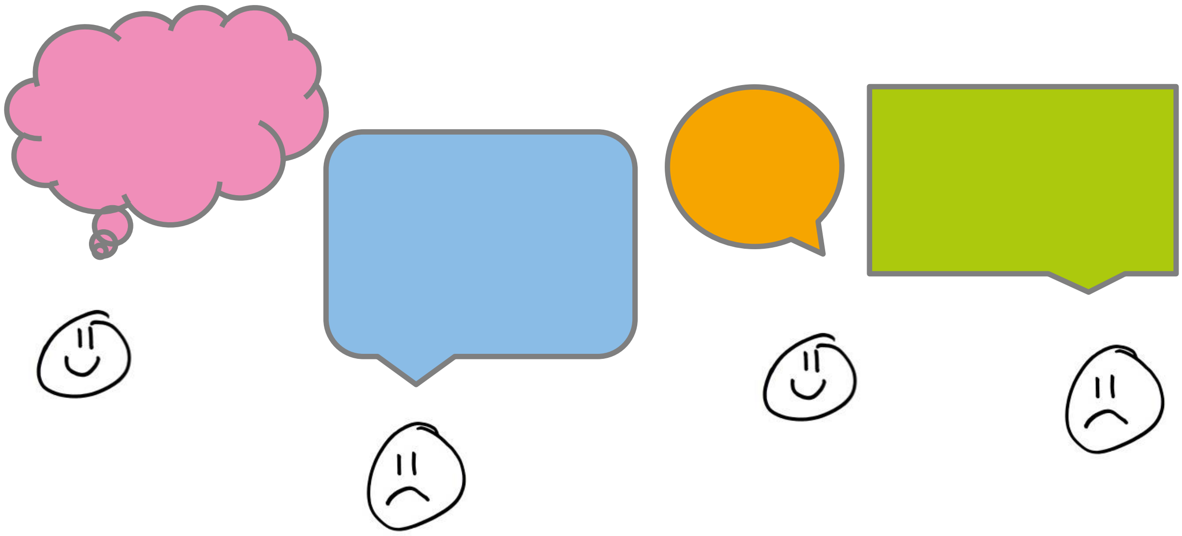
- explore the nature and strength of stakeholders' concerns and values about the issues
- get a snapshot of public opinion when time constraints or finances do not allow a full review or survey
- obtain input from individuals as well as interest groups
- get detailed reaction and input from a stakeholder 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.

How to

A: Brief explanation

First, invite two stakeholders (peers, etc.) to determine the questions explored by the focus group. Next, select the participants and invite them well in advance. Distribute the central question(s) to the participants before the event and let them prepare.

During the event (usually lasting 2-3 hours), you will moderate the group discussion through a semi-structured list of questions to elicit the views of all of the participants. Next, summarise all of the main findings and perspectives provided by the participants. Afterwards, the summaries are analysed, and a report is produced.



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

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.
- Ask someone to take notes (if you can't record the session) or help you to moderate if the group is large.
- Prepare copies of materials and identify small talk topics for icebreaking.
- Prepare audio equipment.
- 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.

Additional ideas / information

- Make sure that all personal data collection and processing regarding the activity is carried out according to EU and national legislation and institutional rules and guidelines.
- 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.

This activity is adaptable online. In order to prepare for the focus group, it would be best to send materials to the participants beforehand. Not only can they think about the topic and prepare for the discussion, but it also saves time in the actual focus group session. Recording the session for later summarisation can be done with your mobile phone, or the integral option available via the online communication tool you are connecting through. A useful tool for this activity would be, for example Zoho meeting as they have a "raise-hand"-feature. Another idea is to ask the participants to have piece of paper ready (maybe in a specific colour) that they hold up when they want to say something. This allows the moderator to structure the discussion and to avoid that people are talking at the same time.

ADAPTABLE ONLINE

METHOD	FOUR QUADRANTS
Area of CoP Activity:	Building relationships
CoP Lifecycle Phase:	Inquire Grow
CoP Success Factor:	Community Interaction Mutual Culture, Values, Belonging
EIGE Step:	Step 1: Getting started
Group Size:	Up to 30
Difficulty Level:	♛ ♕ ♕
Time Needed:	🕘 🕘 🕘
Facilitator Preparation:	🕮 🕮 🕮
Participant Preparation:	✎ ✎ ✎
Description:	This method is a great way to introduce group members and to break the ice in a group. It is a popular team-building method. It is about answering four questions that can be personal or professional. It is recommended that you use a mix of personal and professional questions to keep the activity fun, but focused at the same time. The template includes four examples; however, feel free to introduce your own labels that are more suitable to your community's needs.
More Information:	www.sessionlab.com/methods/break-the-ice-with-the-four-quadrants-activity

ADAPTABLE ONLINE

FOUR QUADRANTS[24]

Short description

This method is a great way to introduce group members and to break the ice in a group. It is a popular 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. It is recommended that you use a mix of both personal and professional questions to keep the activity fun but focused at the same time. The template includes the following: *My Hobby, My Vision for the project; What I Bring to the Project; What I Need from the Group*. However, feel free to introduce **your own labels** that are more suitable to your community's needs.

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.

How to

A: Brief explanation

This method is based on everybody answering the same four 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 their answers.

B: Detailed step-by-step guide

Firstly, the facilitator needs to present the possible questions for this activity. Other questions could be as follows. You can let your participants prepare some ideas in advance of the event:

- ➢ *My happiest moment*
- ➢ *My biggest challenge in this project*
- ➢ *My wildest dream about this project*
- ➢ *My most valuable skill for this project*
- ➢ *My most remarkable, defining moment in my life*
- ➢ *My weakness/strength in this project*

- There is no limit on how many people can form part of this activity. Subdividing the whole group can be helpful if you are working with a large group.
- 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.
- After a couple of minutes each person shares his or her answers with the whole group. If you have more time, you can invite questions from the other participants about each quadrant.

Additional ideas / information

ADAPTABLE ONLINE

- 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, Lego blocks, etc.
- It should be communicated how much time people will have for providing their answers. Maybe a timer would help as well as regularly updating participants on how much time is left.
- The four quadrants activity is adaptable online. It is helpful to explain the method beforehand because otherwise the explanation takes up a lot of time. There are different ways how to adapt it to virtual meetings: Either you can distribute the template via email in advance for the participants to print out. That way, the participants present their creations to the web camera – verbally, supported with drawings, or other creations, etc. Or you can use a web-based application that features a virtual whiteboard or working document which allows creating a drawing/writing in real time to share with the other participants. Another way is to ask participants to share their screens to show their answers. Web-based applications that can be used for this activity are Mural, Miro, Vispa, GoToMeeting, BigBlueButton, Braincert and Samepage as they include a virtual whiteboard or working documents.

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

Template FOUR QUADRANTS

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

ADAPTABLE ONLINE

METHOD	FUTURE WORKSHOP
Area of CoP Activity:	Learning and Developing practice Taking Action as a Community
CoP Lifecycle Phase:	Inquire Design Prototype
CoP Success Factor:	Community Interaction Mutual Culture, Values, Belonging Leadership Strategy
EIGE Step:	Step 1: Getting started Step 3: Setting up a GEP Step 6: What comes after the GEP
Group Size:	5-20
Difficulty Level:	♛ ♛ ♕
Time Needed:	🕙 🕙 🕙
Facilitator Preparation:	🕮 🕮 🕮
Participant Preparation:	✏ ✏ ✏
Description:	The aim of Future Workshop is for all participants to design their desired future without any objections or restrictions, and 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.
More Information:	www.partizipation.at/future-workshop.html www.medialabamsterdam.com/toolkit/method-card/future-workshop/ www.die-bonn.de/esprid/dokumente/doc-2004/apel04_02.pdf

FUTURE WORKSHOP[25]

Short description

Future Workshop allows 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 a 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.

When to use

Future Workshop is effective when new ideas need to be developed and visions need to be explored. Furthermore, it leads to new perspectives as well as a clear view of future developments and possibilities for oneself and the organisation. This method is a relatively straightforward process and it can be run as a standalone activity or it can be informed by previous participative method outputs. A particularly good way to connect this workshop to other methods in this toolkit is to present the outputs from the earlier activities as a stimulus to the conversation.

How to

A: Brief explanation

Future Workshop consists of three main phases:

- **Phase 1: Criticism phase (optional) 20-30 min** – in this phase the current situation is being analysed and problems are being identified.
- **Phase 2: Vision phase 45-60 min** – 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. Participants can think big, everything is possible and there is no right or wrong. There is more benefit in building a challenging and even an unrealistic future and then adapting it than in being too cautious and missing out on creating an aspiring vision for future success.
- **Phase 3: Implementation phase 45-60 min** – the suggestions are being structured and now you are evaluating 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. You could let the participants have the issues/ questions to be worked in before the event, or use ideas from past method outputs.
- As a facilitator explain the topic of the session as well as the aims.
- **Phase 1:** The participants are asked to reflect on the status quo and to write down their points of critique. This could be done individually, where you, the facilitator, record the points of critique on a flipchart/virtual whiteboard for everyone to see. Depending on the group dynamic or the overall mood it might be better to start with the vision phase instead of the criticism phase to not demotivate participants from the start. This part can take 20-30 minutes.
- **Phase 2:** Divide participants into small groups of 4-5 (or breakout rooms). Encourage them 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 approaches to solving the problem do not have to be realistic at this point; there are no barriers or limits. This should last 45-60 min. Use the following trigger questions you can modify as required. Groups/breakout rooms should record their conversation on flip charts or sheets/virtual whiteboard. Encourage them to speak in the present tense. The questions are:

ADAPTABLE ONLINE

[25] 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.

Adapted from the Futures Toolkit: Tools for Futures Thinking and Foresight Across UK Government, Government Office for Science, https://www.gov.uk/government/publications/futures-toolkit-for-policy-makers-and-analysts, Visioning.

- ✓ *What have we achieved?*
- ✓ *Who are our stakeholders? How have they benefited from our intervention?*
- ✓ *What are we most proud about?*
- ✓ *What procedures, structures, or decision-making processes have we designed to ensure the project is sustained?*
- ✓ *How are we measuring progress and success?*
- ✓ *Is there anything we still need to change?*
- ✓ *What are the challenges we face now?*
- ✓ *What have we learned from our successes and failures?*

- Invite groups/close virtual breakout rooms to provide feedback 5 min. per group plus 5 to 10 min. for collective discussion and ask participants to present a summary of their discussion (ask to refrain from reading everything from their sheets). This step is to facilitate a short discussion to compare and contrast the visions and identify the areas of agreement that will form the heart of the vision. Do acknowledge any differences of emphasis or detail that will need to be considered later. Listen in to the conversations and do not let anyone question whether someone else's aspiration is possible – this is not the point of this discussion.
- **Phase 3:** The objective of this step is for groups to come back to the reality and discuss what needs to happen if the vision is to be delivered. This phase is also lengthy and should take 45-60 min. Keep participants in the same groups/breakout rooms to work with the vision they have developed. Use the following prop questions, but you may wish to modify them. Ensure the ideas are recorded on flipchart/sheets/virtual whiteboards for you to gather:

- ✓ *How close are we to our vision?*
- ✓ *What needs to change to achieve the vision?*
- ✓ *Which changes are in our control? Which are not?*
- ✓ *What are the key steps towards achieving the vision? When do we need to achieve them by?*
- ✓ *What resources do we need? Who will lead the process?*
- ✓ *Who will be the winners and losers in this change? How do we bring people with us?*

- Next, as before, invite groups/close virtual breakout rooms to provide feedback 5 min. per group plus 5 to 10 min. for collective discussion and ask participants to present a summary of their discussion to compare and contrast what needs to happen now and how it is going to be resourced.
- Gather all notes from the groups and post-event prepare an aggregated vision that captures as many of the points as possible on 1-2 pages summarising the vision and the implementation (leave the criticism outputs out), and distribute to participants to aid their change implementation.

Additional ideas / information

- The duration of the method can be shortened if participants are very knowledgeable about the status quo and you skip the criticism phase.
- 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. If you want participants to "practice" thinking about a fantasy vision, before they start, conduct a short warm up where participants envision their own future success, rather than organisational/institutional future. For example, ask them to think forward 5-10 years and imagine they have achieved their aspirations. Ask them to think "What they do, where they live, what they are planning to do for their next holiday, what the next week at work holds for them", etc. They do not share their visions.
- Creating a creative and non-judgemental atmosphere is crucial for the generation of new solutions and needs to be considered when preparing the room/location, etc.
- Future workshop is a method that can be designed in very creative ways. When presenting their results, participants can be asked to do that in the form of a poem, sculpture, drawing, sketch or by using modelling clay etc.
- Future Workshop is an action-oriented method. The overall goal should not only be the creation and generation of new ideas but crucially the implementation.

Template FUTURE WORKSHOP

CRITICISM	FANTASY	IMPLEMENTATION

METHOD	HEART HAND MIND
Area of CoP Activity:	Building Relationships
CoP Lifecycle Phase:	Inquire
CoP Success Factor:	Community Interaction Mutual Culture, Values, Belonging
EIGE Step:	Step 1: Getting started
Group Size:	5-15
Difficulty Level:	♛ ♕ ♕
Time Needed:	🕙 🕙 🕙
Facilitator Preparation:	🕮 🕮 🕮
Participant Preparation:	✎ ✎ ✎
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.
More Information:	www.gamestorming.com/heart-hand-mind/

HEART HAND MIND[26]

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.

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.

How to

A: Brief description

Any brainstorming method can be used in conjunction with this thinking framework.

B: Detailed step-by-step guide

1. One option is to divide participants into groups of 4-5 and ask them to collectively look at an issue, project, idea, or procedures using one of the three "lenses". Use breakout rooms if meeting online. (10 min). After this time, ask the participants to share their ideas in the plenary. Repeat for with the other two lenses. If you have 12-15 participants only, another option is to divide your participants into three groups with each working on one lens only, so that each group focuses on a different aspect. After sharing their ideas in groups, open a plenary discussion, with each group presenting their outputs to the rest.

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. To facilitate this process, ask the participants to make a list of the characteristics or features that appeal to the lenses.
3. After developing your ideas, evaluate each argument and score its strengths and weaknesses on the scale 1-10.

Additional ideas / information

Another way of using these three aspects could be to

- Establish rapport and seek empathy with your listener (heart);
- Appeal to your listener's desire for evidence (head); and
- 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:

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

Template[27]

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

[27] 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.

Template HEART, HAND, MIND

HEART	*What makes it emotionally engaging?*
HAND	*What makes it tangible and practical?*
MIND	*What makes it logical and sensible?*

4 METHOD	HOW NOW WOW
Area of CoP Activity:	Learning and Developing Practice
CoP Lifecycle Phase:	Inquire Design
CoP Success Factor:	Sharing Best Practice Learning Strategy
EIGE Step:	Step 1: Getting Started Step 6: What comes after the GEP
Group Size:	1-30 participants
Difficulty Level:	♛ ♛ ♛
Time Needed:	🕚 🕚 🕚
Facilitator Preparation:	🕮 🕮 🕮
Participant Preparation:	✏ ✏ ✏
Description:	How Now Wow is a tool that helps select ideas and leading to new pathways by giving ideas a chance that are unfamiliar but more original and creative.
More Information:	https://gamestorming.com/how-now-wow-matrix/

ADAPTABLE ONLINE

HOW NOW WOW[28] NEW

Short description

How Now Wow is a tool that can be used after idea generating activities, to sort through the different ideas that have been developed. It is especially helpful to avoid choosing ideas and options that are familiar but to really find the best idea or solution.

When to use

This method is best used after other activities that aim at generating ideas such as Brainstorming. It is also helpful if ideas have been developed and it's difficult to decide which one to pursue further. People usually tend to follow paths they're comfortable with and end up choosing ideas they're familiar with. To not follow this path and to make bolder decisions, the How-Now-Wow is a helpful tool.

How to

A: Brief explanation

The basic idea is to categorise the ideas that have been developed either via previous activities or just simply by a discussion. Each of the methods will be categorised by the participants with the help of coloured sticky notes. One colour stands for "Now", which should be used for methods that are "usual" and easy to implement. Another colour stands for "How" which addresses original, creative ideas that are impossible to implement. The third colour stands for "Wow" which is for original/ creative ideas that are easy to implement. Based on the rankings, the group will then have a couple of ideas in each category. The group will focus on the "Wow" ideas but should keep the ideas of the other categories as well ("Now" to implement immediately and "How" to keep in mind for the future.

B: Detailed step-by-step guide

To prepare for this activity, the facilitator of the session needs to draw a 2x2 Matrix (see template below), where the X-axis is the originality/ creativity of an idea and the Y-axis resembles how hard/ easy it is to implement it. The quadrants should be labelled according to the categories "Now", "How", "Wow" with assigned colours.

"Now": Those are basic, normal ideas, that can be implemented easily. These ideas serve to find solutions for gaps in processes, which usually results in additional benefits.

"How": Ideas in this category are creative and original ones which cannot be implemented (at least at this point). Ideas like such have a big impact. The implementation of those ideas is not possible given the current circumstances.

"Wow": Those ideas are creative and original ideas as well but can be implemented easily. Those ideas have the potential to really change something and are implementable within the current situation.

-When working with this method face-to-face, the first step is to list all the ideas that have been developed on a big chart (or several).

-Each participant then gets 3 sticky notes in the three chosen colours (so 9 in total). Depending on the group size or the numbers of ideas, this can be adapted.

-The participants are invited to choose the 3 best ideas in each of the categories by sticking the coloured notes next to the ideas. The decisive factor here is not the total amount of notes stuck next to an idea, but which colour dominates. The idea then falls into this category. If it happens that there is a tie (e.g., 5 for "Now" and 5 for "Wow", then it falls under "Now", if it is 5 for "How" and 5 for "Wow" it goes to "Wow").

-The "Wow" ideas are the ones you will keep working on, which doesn't mean that the other ideas that "won" in the other categories should be thrown out, because the "Now" ideas can be implemented ad-hoc whereas the "How" ideas might be an option for the future.

[28] https://gamestorming.com/how-now-wow-matrix/

This activity is adaptable and can be used in online meetings as well. The matrix can be easily shared with others via a doc, Whiteboard or Mural. Participants can then either via chat or directly in the document categorise the ideas. Other than that, the activity follows the same steps as it would in a face-to-face meeting.

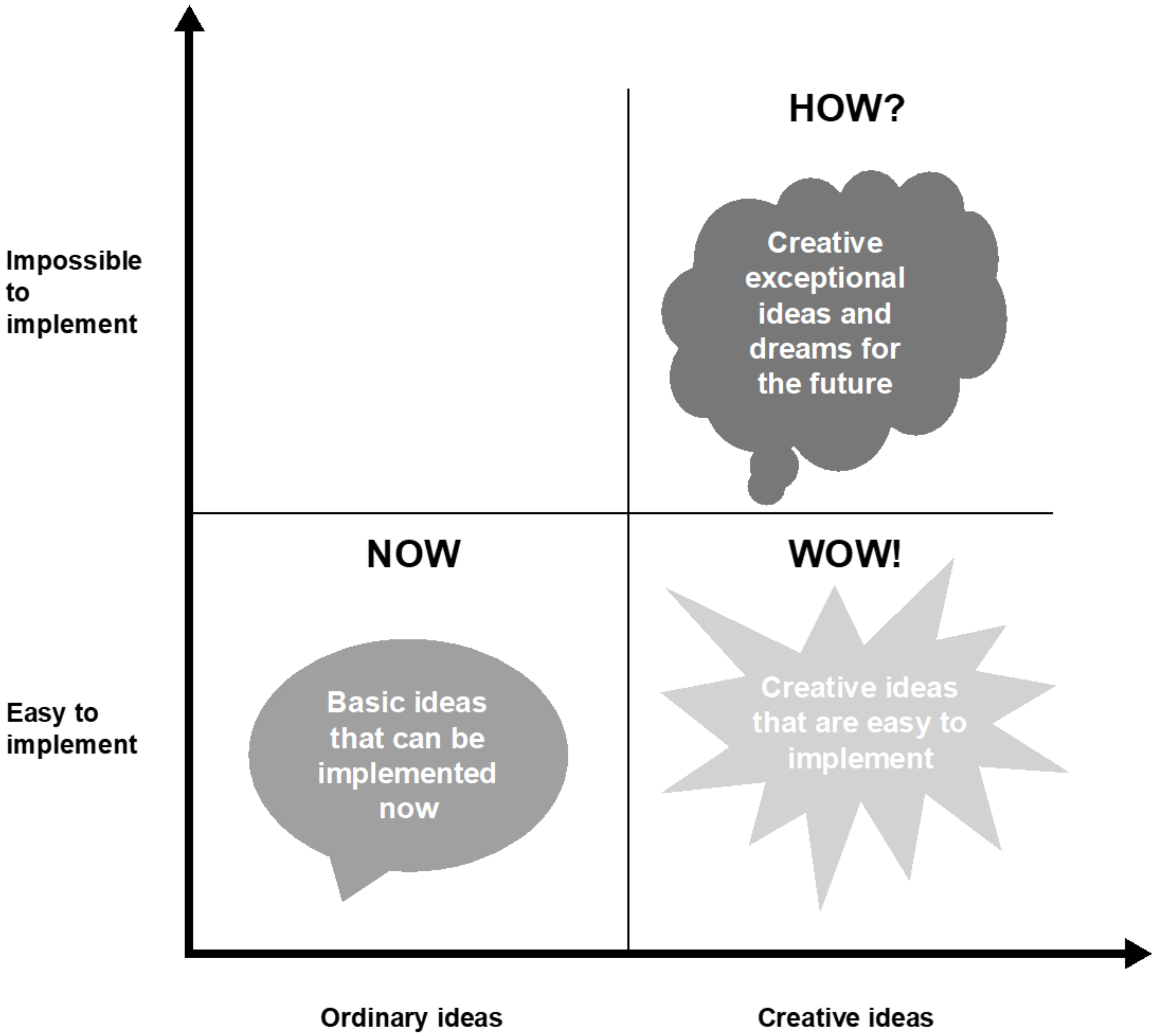
ADAPTABLE ONLINE

Additional ideas / information:

- This activity is a follow-up activity to idea generating activities, so it's best used after one of those activities.
- If the number of idea is very high/ low, participants should receive more/ fewer sticky notes.
- Especially if conducting this activity online, it might be helpful to appoint someone who takes note of all the ideas that have been identified.

Template:

Template | HOW NOW WOW



METHOD	INTERVIEWS
Area of CoP Activity:	Building Relationships Learning and Developing Practice
CoP Lifecycle Phase:	Inquire
CoP Success Factor:	Sharing Best Practice Knowledge Production and Access to Knowledge Learning
EIGE Step:	Step 2: Analysing and assessing the state-of-play in the institution Step 5: Monitoring progress and Evaluating a GEP
Group Size:	5-8 key informants
Difficulty Level:	♛ ♛ ♛
Time Needed:	🕓 🕓 🕓
Facilitator Preparation:	🕮 🕮 🕮
Participant Preparation:	✎ ✎ ✎
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.
More Information:	Gillham, B. 2005. Research Interviewing: The Range of Techniques

ADAPTABLE ONLINE

INTERVIEWS

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.

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.[29]

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 allow the participants to provide their own perspective and even digress to explore the unexpected.

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?"
- 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.
- During the interview, 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.
- 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 not end up with a yes or no answer. Encourage the interviewee to elaborate and provide examples to the responses.
- Save any questions about the stakeholder's opinions you may have for the end of the interview.
- Select key insights, observations and quotes. Use quotes from the interview to present the discovered insights for your colleagues or at a workshop.

Additional ideas / information

- Make sure that all personal data collection and processing regarding the activity is carried out according to the EU, national and institutional 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 (e.g., Zoom). As with the face-to-face version, you need to get approval for recording.

ADAPTABLE ONLINE

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

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.

GENERAL QUESTIONS:

1.
2.
3.

FINDINGS:

INTERVIEWEE PROFILE:

NAME:

ROLE:

ORGANISATION:

RELATION TO THE PROJECT:

SPECIFIC QUESTIONS:

1.
2.
3.

METHOD	LIGHTNING DECISION JAM
Area of CoP Activity:	Learning and Developing Practice Taking Action as a Community
CoP Lifecycle Phase:	Inquire Design Grow
CoP Success Factor:	Community Interaction Sharing Best Practice Learning Strategy
EIGE Step:	Step 1: Getting Started Step 3: Setting up a GEP Step 6: What comes after the GEP
Group Size:	Small to medium sized groups
Difficulty Level:	♛ ♛ ♛
Time Needed:	🕘 🕘 🕘
Facilitator Preparation:	🕮 🕮 🕮
Participant Preparation:	✏ ✏ ✏
Description:	Lightning Decision Jam is an activity to help groups make decisions, discuss challenges and solve problems. It also helps to structure discussions and focus on the most relevant aspects.
More Information:	www.sessionlab.com/methods/lightning-decision-jam-ldj www.ajsmart.com/courses/lightning-decision-jam/ www.medium.muz.li/a-super-simple-exercise-for-solving-almost-any-product-design-challenge-f9e6c0019d7d

ADAPTABLE ONLINE

LIGHTNING DECISION JAM[30] NEW

Short description

By using this activity groups will be supported in making decisions, talking about challenges, and solving problems. Often discussions end up being unstructured, open ended and not goal oriented. This activity helps to get some structure into your discussions and have a clear process.

When to use

This method is best used if you need to structure a discussion on a specific topic or if you need support in making decisions. This can be helpful at the beginning of a process, but also in the middle of it or when thinking about next steps – every time when decisions have to be made. It helps to save time by not having endless discussions, but instead create a structured process when solving problems and making decisions.

How to

A: Brief explanation

The Lightning Decision Jam is a 9-step activity. It starts with the identification of problems, issues and mistakes, which is briefly presented in the plenary. Participants then select problems to be further discussed. The selected problems are then rephrased. If the problem identified is ‘It is difficult to get support staff on board’, it can be converted/ rephrased into: ‘How might we get support staff on board?’. The next step is to look for solutions for the different problems, starting with the one with the most votes. The solutions are then voted on, just as it has been done with the problems. Solutions are prioritised and participants decide on which solution to implement. The last step is to convert the developed solutions into tasks that can be implemented and acted on. By following those nine steps, important challenges are identified, solutions developed, and a decision made on what to do next without getting lost in a large discussion.

B: Detailed step-by-step guide

This activity consists of nine different steps addressing a topic that has been defined before starting, such as how to organise an event, how to implement GE measures etc. There is a video with detailed explanations to look at provided by the developers of this activity: https://www.youtube.com/watch?v=xNpVaNIUS4U.

Step 1: What are the problems?

Each participant takes seven minutes to themselves to think about problems, concerns and issues concerning the defined issue and to write them down on post-its. Those can be things like ‘I’m worried that we won’t have enough time to work on that’ or ‘I feel like I’m not getting enough support’. Anything that comes to the participant’s mind.

Step 2: Share the problems with the group

Each participant has 4 minutes to present the problems/ issues they wrote down and to pin it on a pin board or something similar. It is important that no discussion emerges at that point. It is simply a presentation of the thoughts of all of the participants.

Step 3: Rank the problems

Each participant receives to dots or sticky notes to rank the presented problems/ issues by sticking them next to it. This should also happen without any discussion and should not take up more than six minutes. It is allowed to vote for your own topic and to give both of your votes to one problem. The problems should then be rearranged according to the result of the ranking. Depending on how much time you have and how big the group is you need to decide how many problems you would like to tackle in the next steps.

Step 4: Rephrase the problems

The aim of this step is to use the format ‘How Might We’ and to rephrase the chosen problems accordingly, which could look like this: ‘It is difficult to get support staff on board’, converted/ rephrased into:

[30] https://www.sessionlab.com/methods/lightning-decision-jam-ldj

'How might we get support staff on board?'. By rephrasing the problems this way, they become solvable as well as standardised. This process should not take longer than six minutes (depending on the number of problems chosen) and without starting a big discussion.

Step 5: Find solutions

The group first addresses the problem with the most votes. The participants have seven minutes to write down possible solutions for the problem. This again happens quietly, without a discussion, which allows several different solutions. As these solutions will not be explained to the rest of the group, they should be understandable by just reading them. After the seven minutes, participants quickly pin their solutions on a wall or whiteboard.

Step 6: Rank the solutions

This step is basically a repetition of Step 3, but here the participants rank the solutions that they came up with. Each participant has six votes (in form of a sticky note/ dot) and they have ten minutes for this process.

Step 7: Choose solutions

Within 30 seconds participants should bring solutions in the right order based on the voting results of Step 6. If one solution got less than two votes, they can be excluded.

Step 8: Decide what to act on

With the help of an effort-impact matrix (how much effort does it take to implement the solution & to which degree would a solution solve the problem), it will be determined which solutions should be to try out right away, and which should be kept in mind for later.
This is a very important step, and the facilitator needs to be proactive here, because it tends to be close to an open discussion. The facilitator will place each of the solutions in the matrix.
The facilitator now takes the solution with the most votes, holds it over the centre of the matrix and participants tell the facilitator with 'higher or lower' where to place it. It might happen that discussions emerge. That is something the facilitator should keep under control, so that the placement of the solutions does not take up more than 10 minutes.
After finishing this step, you have an overview over the solutions and how high their impact is and how much it is taking to implement them. The solutions to focus on from now on are on the top left of the matrix, the 'sweet spot' (see template below).

Step 9: Convert solutions into pursuable tasks

The solutions that have the highest impact with the least effort that is needed to implement them will be looked at further: The facilitator asks the participant who suggested the solution to propose actionable steps toward seeing if the solution works. It should be possible to implement those actionable steps within one or two weeks (although this can vary depending on the solution). This is going to be repeated for all the solutions with high impact/ little effort. The solutions that have been placed in another part of the matrix should not be thrown away right away as they can become important if the other solutions fail.

ADAPTABLE ONLINE

This activity can also be used for virtual meetings. It is suggested to use an online whiteboard tool. Some platforms have an integrated whiteboard (not all have the same features!), but you can also use something like Mural. In those online Whiteboard tools, you can then basically do everything just like when meeting face-to-face. It might be a good idea to prepare the whiteboard prior to the meeting (e.g., the matrix), so that you do not lose much time. Especially helpful are platforms that have voting features, where participants can vote easily. If that is not an option, you can do it via chat.

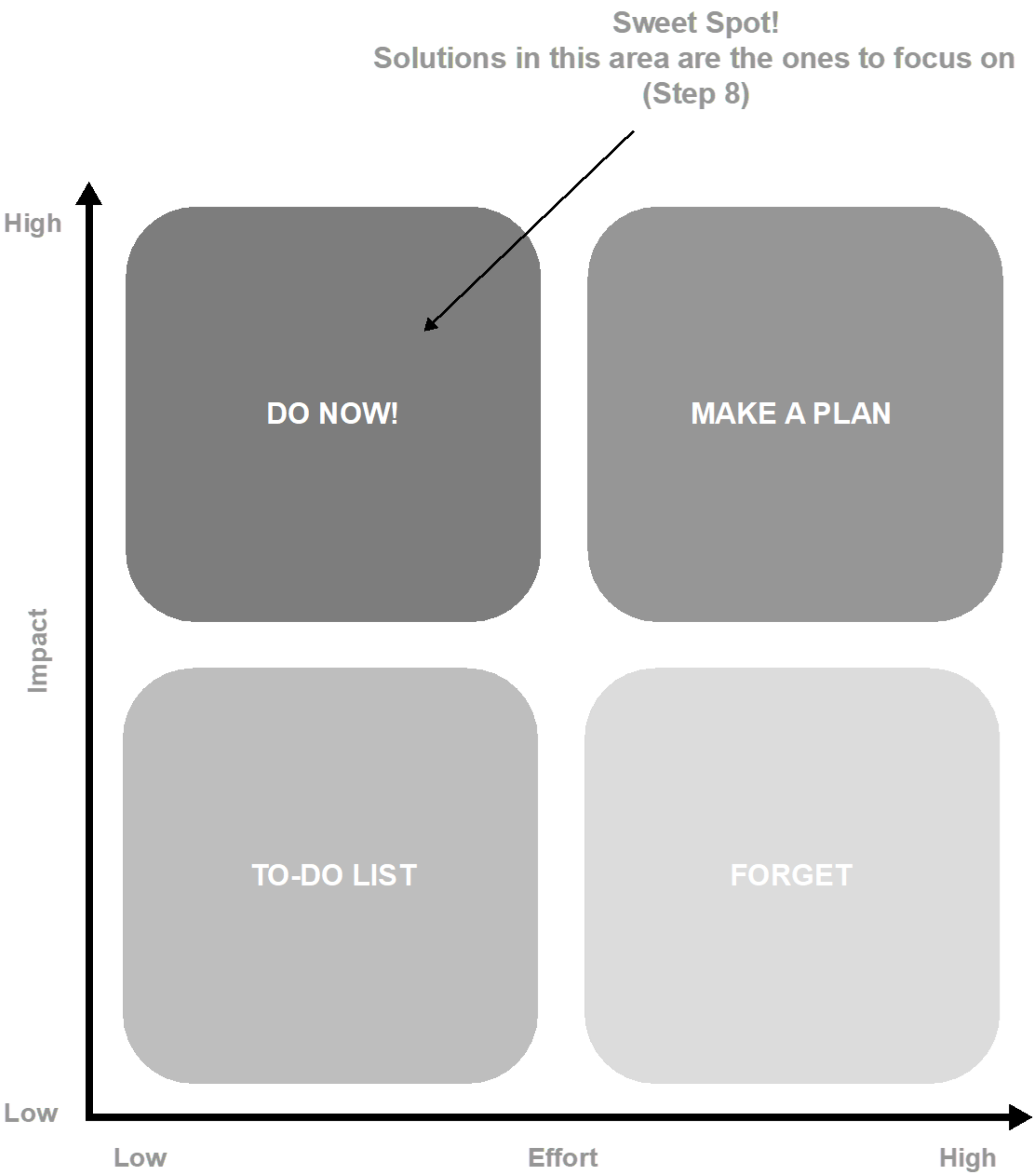
If the chosen platform does not have a whiteboard integrated and you do not want to use another tool, you can also do this by sharing a doc.

Additional ideas / information:

- Although this activity seems rigid and very structured, this is what makes it good and effective. At the same time this allows a different kind of freedom, especially when participants can bring in all the ideas or problems they have.
- Depending on the number of participants, the problems suggested in the beginning etc. might have to be limited.
- When conducting this activity online, it is helpful to not facilitate it alone. It is a rather complex activity with lots of different steps and it is always helpful to have support (e.g., checking the time, rephrasing etc.).

Template:

Template | **LIGHTNING DECISION JAM**



METHOD	MATURE YOUR IDEAS
Area of CoP Activity:	Learning and Developing Practice
CoP Lifecycle Phase:	Inquire
CoP Success Factor:	Sharing Best Practice Strategy
EIGE Step:	Step 1: Getting started Step 6: What Comes After the GEP
Group Size:	3-6 per group
Difficulty Level:	
Time Needed:	
Facilitator Preparation:	
Participant Preparation:	
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.

ADAPTABLE ONLINE

MATURE YOUR IDEAS[31]

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.

When to use

Use it straight after a brainstorming activity or the 1-2-4-All activity to work with the stock of the generated ideas.

How to

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 3-4 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 an idea is too costly, a development question could be "How can we mobilise more resources?"
- Solutions: Think 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.

The Mature Your Ideas activity can be adapted online and be used in virtual meetings. As this is a rather complex activity, good planning and preparation are essential. In order to prepare for this activity, the facilitator needs to know beforehand the number of participants, in order to know in how many groups they can be divided into. It might also help to communicate in advance the topics to be discussed/worked on. To do this activity as an online group activity the web-based application to be used should not only feature breakout rooms but ideally virtual whiteboards as well so that the groups can work with the template on those whiteboards. This can also be facilitated by combining two applications like Zoom and Mural. Other applications that can be used are Miro, Vispa, GoToMeeting, BigBlueButton, Braincert and Samepage.

ADAPTABLE ONLINE

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

Template

MATURE YOUR IDEAS

STRENGHTS	POTENTIALS

CHALLENGES	SOLUTIONS

METHOD	MENTORING CIRCLES
Area of CoP Activity:	Building Relationships Learning and Developing Practice Creating Knowledge Taking Action as a Community
CoP Lifecycle Phase:	Launch Grow Sustain
CoP Success Factor:	Community Interaction Sharing Best Practice Supporting Tools and Resources Mutual Culture, Values, Belonging Learning Knowledge Production and Access to Knowledge
EIGE Step:	Step 1: Getting started Step 6: What Comes after the GEP
Group Size:	6-8 people per mentoring circle
Difficulty Level:	♛ ♛ ♛
Time Needed:	🕙 🕙 🕙
Facilitator Preparation:	🕮 🕮 🕮
Participant Preparation:	✏ ✏ ✏
Description:	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. Circles generate many diverse perspectives, with group members creating synergies through combining experiences beyond what individual members know or contribute.
More Information:	Ambrose 2003 Darwin and Palmer 2009

ADAPTABLE ONLINE

MENTORING CIRCLES[32]

Short Description

Mentoring Circles differ from the traditional mentoring model in that they involve using an innovative, group mentoring, where one mentor is 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. Circles generate many diverse perspectives, with group members creating synergies through combining experiences beyond what individual members know or contribute.

When to use

Multiple mentoring can be generally used when you want to:

- 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.

How to

A: Brief explanation

Mentoring Circles is particularly effective when there are not 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 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.

Before you begin, consider the following questions:

- ✓ *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?*

[32] Adapted from Ambrose (2003), and Darwin and Palmer (2009).

B: Detailed Step-by-step guide

- Identify an experienced, knowledgeable individual who will freely agree to become a mentor.
- 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.[33]

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[34].

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.

ADAPTABLE ONLINE

[33] Taken from Ambrose (2003: 59)

[34] Adapted from Darwin and Palmer (2009: 134)

METHOD	NINE WHYS
Area of CoP Activity:	Learning and Developing Practice Taking Action as a Community
CoP Lifecycle Phase:	Inquire Sustain
CoP Success Factor:	Community Interaction Leadership
EIGE Step:	Step 1: Getting Started Step 2: Analysing and Assessing the State-of-Play Step 6: What Comes After the GEP
Group Size:	Unlimited
Difficulty Level:	
Time Needed:	
Facilitator Preparation:	
Participant Preparation:	
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, but also to show each individual the purpose, goal and value of their work.
More Information:	www.liberatingstructures.com/3-nine-whys/

ADAPTABLE ONLINE

NINE WHYS[35]

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, but also to show each individual the purpose, goal and value of their work.

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.

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

The central question of the whole activity is "why?"

- 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 cannot go deeper because they have already 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 questioned person who will sense that they have reached the ultimate answer.

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

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.

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

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

Additional ideas / information

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

The Nine Whys activity can be adapted online and used in virtual meetings with the right preparation and technical support. One important aspect when adapting this activity online is to make sure that the group is not too big. As the first step is to work in pairs you would need a lot of breakout rooms when the group is too big. Time management in this activity is also very important because of the regrouping (pairs, then groups of fours and back to plenary). When planning the session, this should be kept in mind. For this activity, a web-based application that allows splitting up a group in sub-groups is needed, such as Zoom, Vispa, Whereby, GoToMeeting, or BigBlueButton.

ADAPTABLE ONLINE

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!

METHOD	PERSONAS
Area of CoP Activity:	Learning and Developing Practice
CoP Lifecycle Phase:	Inquire Design Prototype
CoP Success Factor:	Learning Supporting tools and resources Strategy
EIGE Step:	Step 2: Analysing and Assessing the State-of-Play in the Institution Step 6: What Comes After the GEP
Group Size:	8-30
Difficulty Level:	♛ ♛ ♕
Time Needed:	🕓 🕓 🕓
Facilitator Preparation:	🕮 🕮 🕮
Participant Preparation:	✎ ✎ ✎
Description:	Personas is a useful tool to identify and communicate complex data about a target group and to bridge the gap between design/implementation team and target group, by creating a vivid personal representation of the group. Use the method as a reference point to focus on GEP, policy, or practice outcomes creating “How might we” questions and generating ideas.
More Information:	www.interaction-design.org/literature/article/personas-why-and-how-you-should-use-them

ADAPTABLE ONLINE

PERSONAS NEW

Short description

This activity helps in designing impactful policy interventions. You achieve this by creating personas - *fictional* characters - based on your team's research to represent the different policy/practice/intervention end-users who will benefit from your action. Creating personas will enable you and your team to understand your end-users' needs, experiences, behaviours and goals. Importantly, this activity will help you and your team step out of yourself and empathise with your target group. It can help you to recognise that people have different needs and expectations. Personas will require several meetings with your community/team to conduct **ten important stages** from finding you end-users to the ongoing development of the interventions.

When to use

If you want to identify and design effective and efficient, targeted policy/practice interventions for the specific end-users that need support.

How to

A: Brief description

Personas require a structured, systematic plan of actions and meetings planned in advance to enable you and your team to carefully and methodically create your personas and the desired interventions. These meetings can easily take place online (recommended), as many shorter meetings might be required, rather than few long ones. Shorter meetings can also act as 'checking in' to ensure people know and fulfil their role effectively during the Personas activity process.

B: Detailed step-by-step guide

Invite your participants to an introductory face-to-face (1 hrs), or an online meeting (no more than 1.5 hrs). Each consecutive meeting can last longer depending on which stage of the activity you are. When you meet for the first time with this idea in mind, make the point of this method clear:

What exactly do you use the Personas for and what intervention will they be used for?

GEP? Policy intervention? Best practice implementation? Innovative action to support your end-user?

We do not prescribe how often or for how long you should be meeting with your participants. Rather, the structure for this process should be co-created and agreed with your participants before embarking on the activity to find the best way to organise it. Therefore, the description below allows you the flexibility required in your specific context and to suit you and your participants' needs.

Make sure that in the first meeting you describe all the ten stages of the activity. From a web page source, you can provide an example to your participants to illustrate what Personas description looks like so that they know what they are going to be working towards. You can find some examples on the www.interaction-design.org website (see previous page for full URL), however **use these examples very generally, as they do not reflect the ACT CoPs' agenda context.**

Stage 1: Find your end-user

In this stage of the activity, decide with your team who you want to support/help through your intervention. Ask questions such as: Who are your end-users? How many of them are there? What do they typically do? Why should they benefit from your intervention?

Stage 2: Build a hypothesis

What are the differences among these users you have identified? Try to analyse any material you might have, group and label the users.

Stage 3: Verify your ideas

This stage will require fieldwork by the participants. Divide them into teams ahead of the meeting and get them to research the following:

Data for your personas (likes/dislikes), data for situations (area of work, work conditions), data for scenarios (work strategies and goals; career strategies and goals, family strategies and goals).

To gather this information, you may want to consider interviews, focus groups, informal chats with your end-users and other stakeholders closely working with them. Ensure anonymity at all times.

Stage 4: Find patterns

Discuss your findings from fieldwork and decide if the initial grouping you conducted in Stage 2 still holds. If not, correct, re-frame and re-label. Your fieldwork might have clarified some unknowns about your-end-users which will have to be reflected in the original groupings and characteristics of your personas. Are there any other groups to consider? Have you neglected anyone who also requires your attention? Are all personas/groups equally important? Or perhaps you need to be focused on one/two specific end-users?

Stage 5: Construct Personas

This activity works best in groups of people who work for 45-1 hr on constructing a thorough picture of a persona. Get the participants to ask the following questions to help them create their persona:

- Body (name, age, picture sketch, photo from a photo stock) – this will give you a genuine impression of your end-user, even though it is fictional.
- Psyche (extroverted, introverted)
- Background (is this relevant in terms of their department, subject area, seniority level, other characteristics of their context)
- Emotions/attitudes (to the institution; to the work/career/family issues; to opportunities and possibilities)
- Personal traits (are they relevant to your interventions?)

Stage 6: Define situations and design interventions

Answer questions such as:

What are the needs of this persona? What are the situations in which this persona finds themselves? How could they benefit from an intervention and in what situation? What is the most effective, efficient, and targeted support mechanism for your end-user?

Stage 7: Validate/buy-in

After creating the Personas and the situations, get your participants to validate what they have created. Of course, this persona is fictional, but do you know someone similar to this persona? Get the participants to listen and then comment how well the persona captures the real person. Have you omitted anything important? Have you added unnecessary, spurious traits that will not help you design a relevant intervention?

Stage 8: Disseminate the knowledge

If you and your participants are confident that your personas are well captured and effectively represent the end-user who could benefit from your interventions, get the participants to brainstorm how you can share this persona (or a set of personas) with the organisation or the institution and the stakeholders it will affect. Ask the persons you think your personas represent. Make adjustments if necessary.

Stage 9: Create scenarios

This stage will require your imagination again, as you need to imagine in a given situation, with a given goal, what happens when the persona uses your intervention? Use a narrative scenario using personas descriptions and situations to form scenarios.

Stage 10: Ongoing development

Develop your intervention and implement it. After a period of time, reconvene to discuss if the new intervention alters the personas. How effective is the intervention? Has it shaped your personas? Collect new information through feedback, interviews, focus groups, informal discussions, usability reports, etc.

METHOD	PLAN OF CHANGE (THEORY OF CHANGE)
Area of CoP Activity:	Taking Action as a Community
CoP Lifecycle Phase:	Design Prototype
CoP Success Factor:	Leadership Strategy
EIGE Step:	Step 1: Getting Started Step 3: Setting up a GEP Step 4: Implementing a GEP Step 5: Monitoring Progress and Evaluating a GEP Step 6: What Comes After the GEP
Group Size:	8-25
Difficulty Level:	♛♛♛
Time Needed:	🕘🕘🕘
Facilitator Preparation:	🕮🕮🕮
Participant Preparation:	✎✎✎
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. 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.
More Information:	Vogel 2012

ADAPTABLE ONLINE

PLAN OF CHANGE (THEORY OF CHANGE)

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.

When to use

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).

How to

A: Brief explanation

Plan of Change helps to expose how our current plan is organised, 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.[36]

B: Detailed Step-by-step guide

ADAPTABLE ONLINE

- Book a meeting for at least 1.5 hours (2 hrs for virtual), inviting relevant participants that as a group possess deep knowledge of the focus area. Print the template (or write the headlines on a flip chart, or Mural, etc.) and use it as the focal point for the discussion. Let your participants know what the subject of the activity is to allow them to think ahead and prepare their outputs (optional).
- In the template we work from “impacts” and work towards “resources”, but you can also begin with “resources” and work towards “impacts”. It is important to ensure everyone operates with the same definitions of the headings to ensure mutual understanding. Before you begin your work, introduce the method, and clearly explain what each category means as suggested below to ensure a common understanding of these categories by all participants*.
- If you have many participants, you could divide them into smaller groups (breakout rooms) to work on each category and then after 10 min. bring them all back into the plenary to select the most recurring themes/ideas.

*) It’s important to distinguish both the long- and short-term impacts as it helps to understand and create a change strategy.

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

- **LONG-TERM IMPACT:** this impact can be characterised as the “big picture”, the ideal scenario, and as such it if often quite speculative. It can be based on the belief that some short-term impacts and results may one day lead to broader applications or a wider development.

  e.g. An increased rate of GE plan implementation in RFOs and RPOs.

  Write all desired long-impacts the project should achieve on post-it notes. If possible, write how you wish to evaluate these impacts.

- **SHORT-TERM IMPACT:** is the development of a temporary solution or a partial solution to the bigger problem, which is hoped to be resolved after further developments and implementation. Following from the example above a short-term impact leading to this could be:

  e.g. RPOs and RFOs are able to monitor and evaluate the state of play of gender equality in the institutions (which will make them realise they need to implement GE plans).

- **RESULTS:** are the outputs, the products of your activities. Describe the results that would lead to the desired impacts. 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.

  e.g. The production of the Gender Equality Audit and Monitoring Tool (GEAM).

  Draw pathways between the impacts and results – and discuss which results precede a given impact.

- **ACTIVITIES:** 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:

  e.g. Designing, piloting, refining, translating the GEAM tool.

  Draw pathways to impacts and results.

- **RESOURCES:** List the resources (finance, people, buildings, IT, etc.), that will be used to implement the activities. Who and what do you need?

  e.g. Existing GE surveys, Athena Swan surveys, quantitative researchers, experts’ panel for focus groups, software: Survey Monkey, SPSS, financial support, etc.

  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.

  e.g. We assume that we have enough quantitative researchers and expertise to design the tool.

- 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?

Additional ideas / information:

Alternatives[37]:

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?
- Discuss and use as an opportunity for reflection

Some guiding issues and questions to use in the process:

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?

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?

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?

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

Template

PLAN OF CHANGE

LONG-TERM IMPACT	SHORT-TERM IMPACT	RESULTS	ACTIVITIES	RESOURCES

METHOD	SMART CRITERIA/GOALS
Area of CoP Activity:	Taking Action as a Community
CoP Lifecycle Phase:	Design
CoP Success Factor:	Strategy
EIGE Step:	Step 1: Getting Started Step 3: Setting up a GEP
Group Size:	1-8
Difficulty Level:	♛ ♕ ♕
Time Needed:	🕓 🕓 🕓
Facilitator Preparation:	🕮 🕮 🕮
Participant Preparation:	✎ ✎ ✎
Description:	If your community 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. The letters stand for Specific, Measurable, Attainable, Realistic and Terminable. It helps to determine the objectives of actions.
More Information:	Lawlor and Hornyak 2012 MacLeod 2013 www.mindtools.com/pages/article/smart-goals.htm.

ADAPTABLE ONLINE

SMART CRITERIA / GOALS[38]

Short description

If your community 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.

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.

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 publish a paper”.
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?
- **Measurable?** Is it somehow measurable to control the publication? Beforehand it is important to define parameters or steps that can be used to determine success. This could mean: Has my proposal been accepted? Does my paper meet all requirements of the publisher?
- **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 publish a project-related paper by writing a proposal and looking for Calls and by sending my proposal to at least 4 journals in the next 6 weeks.

This activity can be easily adapted online, without significant changes compared to face-to-face. A web-based application with a virtual whiteboard can be used to illustrate the SMART-definition which can be helpful but is not mandatory. Web-based applications that provide such a feature are for example Mural, Miro, Vispa, GoToMeeting, BigBlueButton, Braincert or Samepage.

ADAPTABLE ONLINE

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

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.

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?

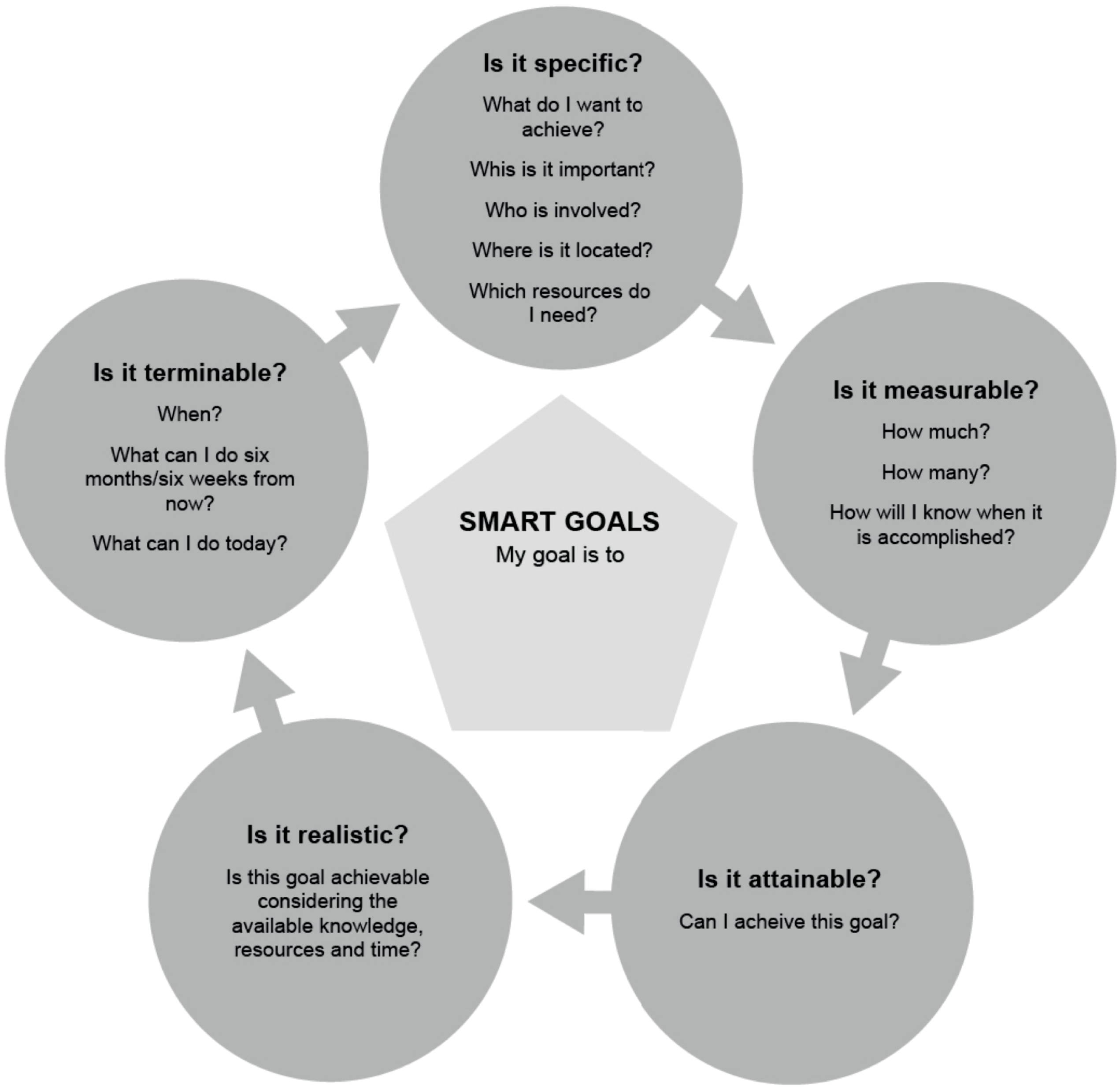
IS IT ATTAINABLE?
Can I achieve this goal?
Have I got access to the resources?

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



METHOD	STINKY FISH
Area of CoP Activity:	Building Relationships Taking Action as a Community
CoP Lifecycle Phase:	Inquire Design Prototype Sustain
CoP Success Factor:	Community Interaction Mutual Culture, Value, Belonging
EIGE Step:	Step 1: Getting Started Step 6: What comes after the GEP
Group Size:	Up to 30 people
Difficulty Level:	
Time Needed:	
Facilitator Preparation:	
Participant Preparation:	
Description:	A short method to enable people to share concerns and anxieties to create openness and clear the air. The stinky fish metaphor is used to illustrate that if you keep negative thoughts and feelings but never talk about them, the 'stinkier' it gets. By putting your 'stinky fish' on the table, people can relate to each other, break the ice, get more comfortable sharing, and uncover areas for learning and development.
More Information:	www.liberationist.org/uncover-the-stinky-fish-canvas/ www.toolbox.hyperisland.com/stinky-fish

ADAPTABLE ONLINE

STINKY FISH NEW

Short description

ADAPTABLE ONLINE

The humorously labelled Stinky Fish is an incredibly versatile activity that can be incorporated into any brainstorming technique, 1-2-4-All, or used in its own right (similar to the Four Quadrants), both face-to-face and online. The purpose of this method is to get people talking about problematic issues that trouble them, which they would not normally discuss openly. Silent problems are often carried around in people, but no one has the courage to address them. However, if the issues are not addressed and remain ignored, they may become more complex to resolve, or even block the goals the community is trying to achieve.

When to use

The idea behind the metaphor of the stinky fish is that the longer you keep something unpleasant and keep quiet about it, it becomes more and more rotten. This activity will be helpful in situations where you are aware of past conflicts, failed projects, resistance to change, a lack of resources and support, or perceptible negative emotions within the community. Paradoxically, people may feel more comfortable sharing their worries, anxieties, uncertainties, and angsts with strangers than with their institutional peers. For external workshops, this canvas can be introduced early on, however for a group of people based in the same department/institution ensure that there is enough trust and commitment to retain confidentiality.

How to

A: Brief description

The Stinky Fish method in this toolkit is based firstly on individual reflection, and secondly, allowing the participants to open up and share their concerns, anxieties, angsts, grudges, and uncertainties with the whole group. Once the stinky fish is out in the open, you may wish to follow up this activity with inviting the participants to come up with antidotes and solutions to the biggest or most recurring issues reported.

B: Detailed step-by-step guide

1. Explain the process. Distribute one template per person or email a copy of the template to the participants in advance and get them thinking beforehand. Ask the participants to explore and share their individual worries and concerns about the future/project to start a dialogue and try to confront or overcome these uncomfortable issues. You can do this as part of asynchronous prep, or just conduct it during the session. The questions in the template are predefined, however you may wish to consider other questions depending on your context. Alternatively, you can leave it completely unstructured, and provide no questions, just ask the participants to think about their negative thoughts and fears in general. In all cases, ask the participants to write only a few words or a brief phrase inside the fish. At this point, they do not need to get into too much detail. (10 min)
2. Once all participants have written their stinky fish, sit in a circle (if meeting face-to-face), and ask each participant to share their stinky fish with the rest of the group for no more than a minute each, until all participants have shared. At this stage, do not allow interruptions, but let only one person speak. If you are meeting face-to-face and the group is uncomfortable sharing their issues (e.g., close colleagues, etc.), you could put together a gallery of all the stinky fish on the wall, and invite the participants to explore the issues. (max. 1 minute per person)
3. It is important to thank the participants for opening up and sharing their anxieties. This activity in itself might break the ice and make the participants realise that other members have similar stinky fish, so they are not alone. As a follow up you may want to invite them to collectively select the top three most recurring/important issues and come up with antidotes and solutions through another activity.

Additional ideas/ information

Another option would be to use a collectively editable whiteboard (e.g., Mural) to all participants to add their inputs onto the Stinky Fish canvas. Next, ask each participant to elaborate on their sticky note in the whole group.

Template:

Template

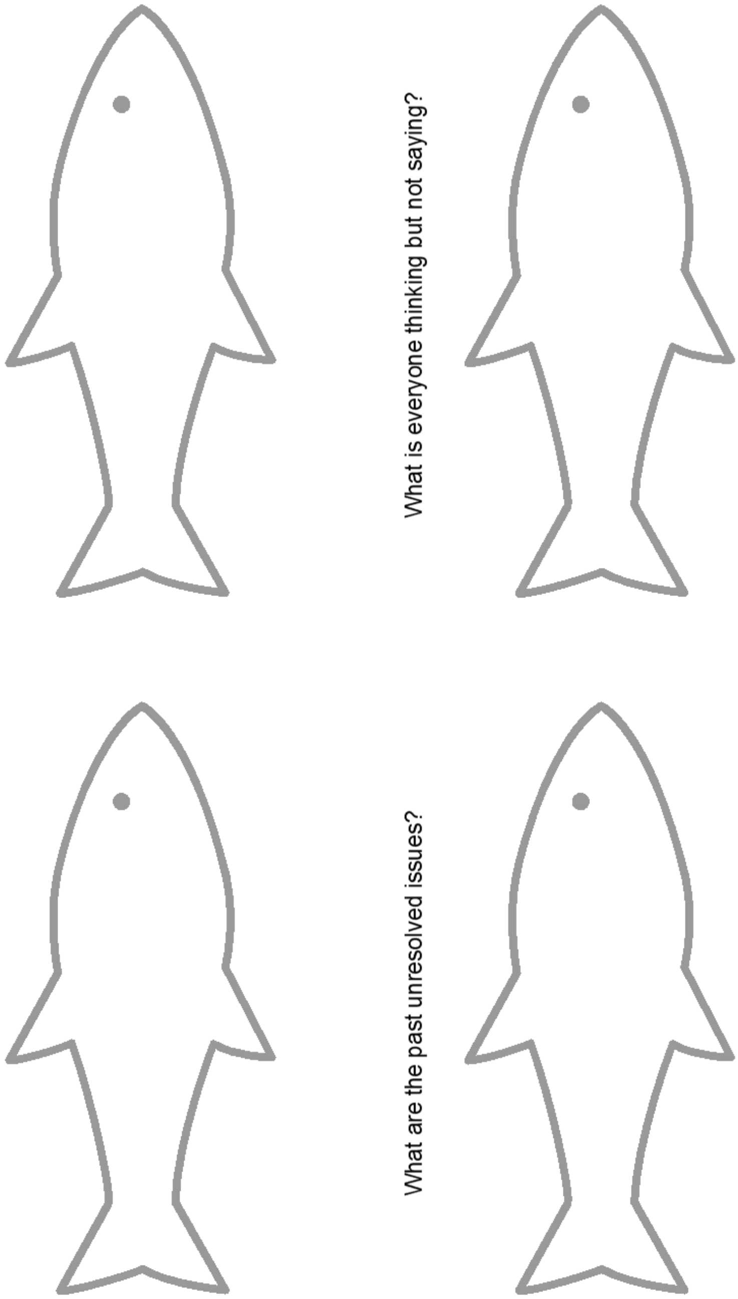
STINKY FISH

What are your uncertainties?

What are you afraid of or worried about?

What are the past unresolved issues?

What is everyone thinking but not saying?



METHOD	SWOT AND PESTEL
Area of CoP Activity:	Learning and Developing Practice Taking Action as a Community
CoP Lifecycle Phase:	Inquire Sustain
CoP Success Factor:	Learning Sharing Best Practice Supporting Tools and Resources Strategy
EIGE Step:	Step 1: Getting Started Step 2: Analysing the state-of-play in the institution
Group Size:	8-12 people
Difficulty Level:	♛ ♛ ♕
Time Needed:	🕘 🕘 🕘
Facilitator Preparation:	📖 📖
Participant Preparation:	✏ ✏
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.
More Information:	www.unicef.org/knowledge-exchange/index_83128.html

ADAPTABLE ONLINE

SWOT AND PESTEL[39]

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 individually, 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

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.

How to

A: Brief description

SWOT

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

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. 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.

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

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 be 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, summarise 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 capitalise on strengths;
    d) How to overcome, minimise 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 organisations, 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 organisation 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, organisational culture (within a major relevant organisation).
- 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 organisation 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.

METHOD	W3: WHAT, SO WHAT, NOW WHAT
Area of CoP Activity:	Learning and Developing Practice Taking Action as a Community
CoP Lifecycle Phase:	Grow Sustain
CoP Success Factor:	Community Interaction Illustrating Results and Performance Sharing Best Practice Strategy
EIGE Step:	Step 2: Analysing and assessing the state-of-play in the institution Step 6: What comes after the GEP
Group Size:	Unlimited number of groups; 3-7 people per group
Difficulty Level:	♛ ♕ ♕
Time Needed:	🕓 🕓 🕓
Facilitator Preparation:	📖 📖 📖
Participant Preparation:	✏ ✏ ✏
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. 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”.
More Information:	www.liberatingstructures.com/9-what-so-what-now-what-w

ADAPTABLE ONLINE

W3: WHAT, SO WHAT, NOW WHAT[40]

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.

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.

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

- 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?"
- The number of groups in this activity is not limited. Each group should consist of 5-7 people. Everyone is included in this activity and has equal opportunity to contribute to each group.
- 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 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.

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

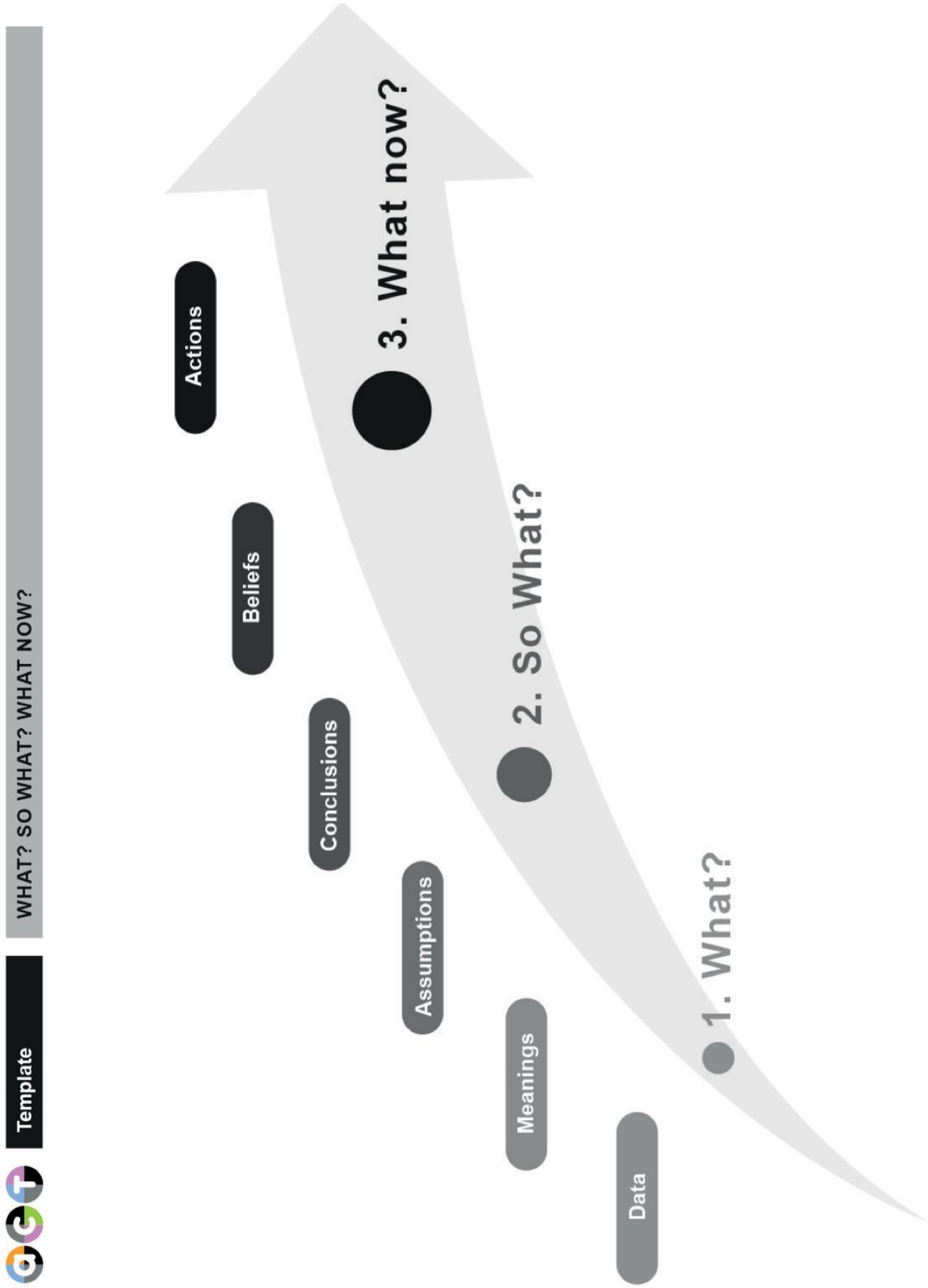
Additional ideas/ information

- 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.
- It helps to set time limits for the different steps of the activity in order to avoid getting lost in one step.

ADAPTABLE ONLINE

The W3 activity can be adapted online and used for virtual meetings. The process doesn't need to be adapted but some things should be taken into account: When deciding on a web-based application it is important to make sure it allows to divide participants in smaller groups (breakout-rooms). This takes time that should be considered when planning the activity. It is also important to set a time limit for the group work and to have a timer to stop the time. It might also help to share the visualisation beforehand with the participants. To not lose too much time on explaining the process of the activity, this can also be done before the meeting. Web-based applications that provide breakout-rooms you could use are for example Vispa, Whereby, GoToMeeting, BigBlueButton or Zoom

Visualisation:[41]



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

ADAPTABLE ONLINE

METHOD	WHAT I NEED FROM YOU
Area of CoP Activity:	Building Relationships Learning and Developing Practice
CoP Lifecycle Phase:	Inquire Design Prototype
CoP Success Factor:	Community Interaction Mutual Culture, Values, Belonging Sharing Best Practice Supporting Tools and Resources Leadership
EIGE Step:	Step 2: Analysing and assessing the state-of-play in the institution Step 4: Implementing a GEP
Group Size:	Unlimited number of groups; 3-7 people per group
Difficulty Level:	
Time Needed:	
Facilitator Preparation:	
Participant Preparation:	
Description:	This activity aims to help people working in different contexts to get quickly 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.
More Information:	www.liberatingstructures.com/24-what-i-need-from-you-winfy

WHAT I NEED FROM YOU[42]

Short description

This activity aims to help people working in different contexts to get quickly 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.

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 and working successfully and productive toward an objective is being facilitated. So if the work in an organisation/ project lacks efficiency this activity could help by identifying, communicating and addressing the needs of people involved.

How to

A: Brief description

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

B: Detailed step-by-step guide

- 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.
- The participants should be divided in 3 to 7 groups. The size of the groups 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 group. The needs and responses are recorded on paper. Each person is part of a group and everyone has the chance to participate.

Process of the activity:

- The activity starts by repeating the goal or challenge that is being addressed (this could be a specific task, the job in general etc.) in this session so that everyone understands the context in the same way. For example: What is it that the participating individuals need to fulfil a specific task, to solve a specific problem or to work efficiently in general?
- 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 groups are being positioned within the room.
- One idea is that the groups 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 need from you [to successfully fulfil this task] is XYZ".
- Each group selects the two most important needs. A selected spokesperson represents the group. The spokespersons come together in the centre 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 was not clear enough).
- Each of the spokesperson reiterates the requests that were 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).

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

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 has not been communicated clear enough
- - important point to remind the participants.

This activity can also be used in virtual meetings. To be able to divide the group in subgroups the web-based application you’re using should have a feature to do that like for example Zoom, Vispa, GoToMeeting, BigBlueButton, or Samepage. It could also be helpful to have a virtual whiteboard or a shared working document, so it would be good to choose an application that provides both or to combine two applications like Miro with Zoom for example. It is also important to communicate clearly how much time participants have for each step of the activity and it can be helpful to explain the activity beforehand to save time in the actual meeting.

ADAPTABLE ONLINE

METHOD	THE WORLD CAFÉ
Area of CoP Activity:	Learning and Developing Practice Creating Knowledge
	ADAPTABLE ONLINE
CoP Lifecycle Phase:	Design Launch Grow
CoP Success Factor:	Community Interaction Knowledge Production and Access to Knowledge
EIGE Step:	Step 4: Implementing a GEP
Group Size:	Large groups (12 people or more)
Difficulty Level:	♕♕♕
Time Needed:	🕙🕙🕙
Facilitator Preparation:	🕮🕮🕮
Participant Preparation:	✎✎✎
Description:	The World Café aims to facilitate collaborative dialogue and knowledge and idea sharing in a creative way through conversation by creating a café ambiance of small groups sitting around tables. After a specified time, the participants move to a new table, apart from the table host, 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.
More Information:	Slocum, N. 2003. Participatory Methods Toolkit: A Practitioner's Manual. http://archive.unu.edu/hq/library/Collection/PDF_files/CRIS/PMT.pdf. www.theworldcafe.com

THE WORLD CAFÉ

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).

When to use

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:

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

How to

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 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 synthesise 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.[43]

The World Café activity can – with good planning and preparation – be adapted to use in an online meeting. This activity is quite time intensive it might be a good idea to split this up into two sessions: The first session for the group work and the second session for the sharing of insights, discoveries, and ideas that the groups has developed.
Instead of having different tables for the groups, when conducting a meeting online, breakout rooms are needed. To always move one person from one room to another takes time and the groups as well as the regrouping should be planned beforehand, so it is important to know how many people will join the meeting. It is also helpful to assign the groups names or labels (e.g. colours) to avoid confusion. Additionally, the ambassadors and host can put a post-it on their shirts so that everyone knows who is who. Instead of using a big poster or tablecloths in an online meeting, virtual whiteboards (e.g. via Miro, Mural, Vispa or GoToMeeting) can be used. If that's not possible, then the host of a group can be the person writing down the inputs from the ambassadors and then sharing this with the group. As a meeting space Zoom, GoToMeeting, Zoho Meeting Whereby, Braincert, Samepage or BigBlueButton can be used.

ADAPTABLE ONLINE

[43] Adapted 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.

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 schematisation.

The use of infographics can benefit Communities of Practice by helping them to present its activities and outcomes in a quick, 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 visualisations 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.

Tips to prepare good infographics

The first step to create an infographic is to identify what the main purpose and the core message to spread are: 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 ep-By-Step-Guide][44]" 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. Prioritise clarity, do not include too much information and leave white spaces; if the infographic is hard to visualise 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.

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

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 visualisation 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 visualise 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 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.

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 synthesise 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 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[45].

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

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 emphasised.

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 to be harmonic or to emphasise 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[46].
- **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 image 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[47].

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

[47] 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/

© Image by Gorka Ipinazar Santamaria (Shutterstock). 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.
- 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 on 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, synthesise 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, wallpaper 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 and pictures of the workshop will be taken to elaborate a summary report.
- Request for due informed consent of participants to use image 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[48].
- **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[49].

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.
- **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.

[48] https://www.gimp.org/

[49] https://pixlr.com/

STORYBOARDS

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.

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).

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.[50]

Additional ideas / information

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

ADAPTABLE ONLINE

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

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.

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[51]. 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[52]:

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[53].

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 keywords. The page allows to filter by tags, by upload user or by upload date.

Resources

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

Toolkit

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[51] 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.

[52] 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.

[53] https://www.genderportal.eu/groups

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 diagnosis (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.

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