COMMUNITY OF PRACTICE CO-CREATION TOOLKIT v.2

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THE ACT CONSORTIUM

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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.

The draft consists of the toolkit's 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 a virtual meeting 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 and them further. Co- creation in this toolkit thrives on an equal contribution from the members 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.

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).
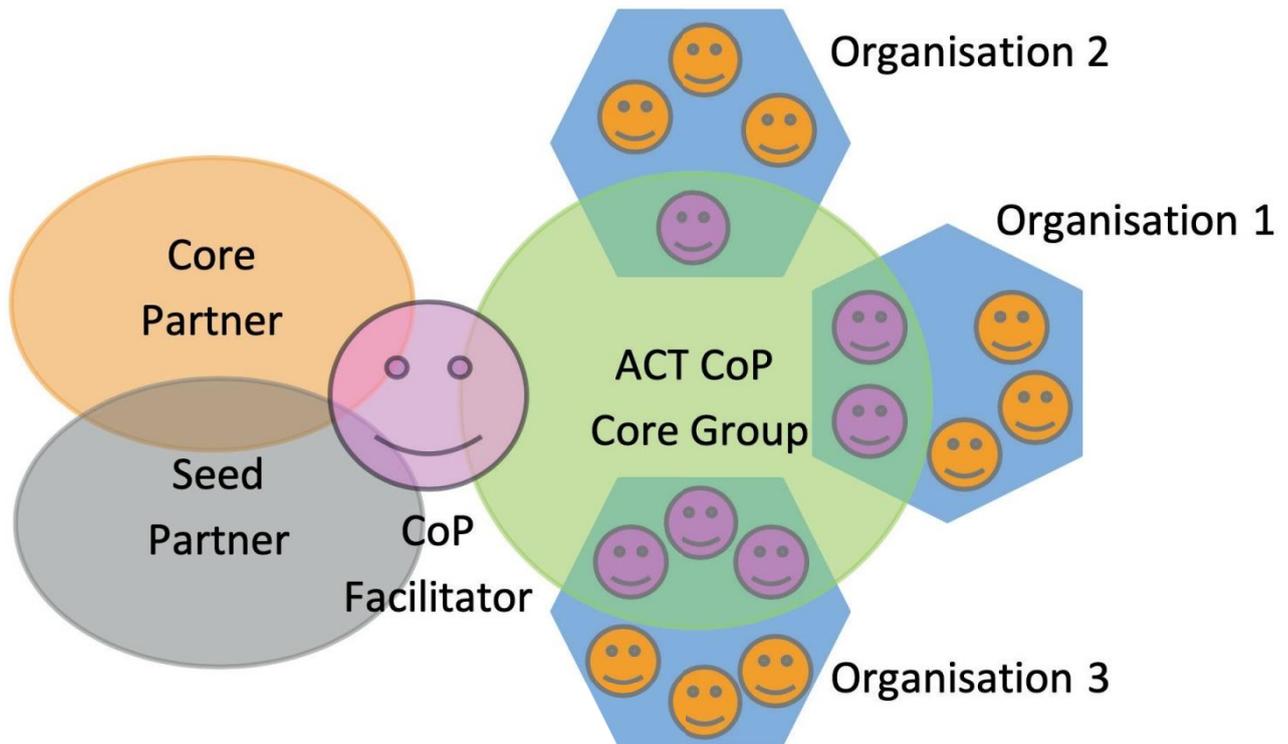

Figure 1. ACT CoP Core Facilitation

WHAT IS THE TOOLKIT'S GUIDING FRAMEWORK?

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

1. CoPs success factors (various literature)
2. CoPs lifecycle phases (McDermott 2000);
3. CoPs' 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.
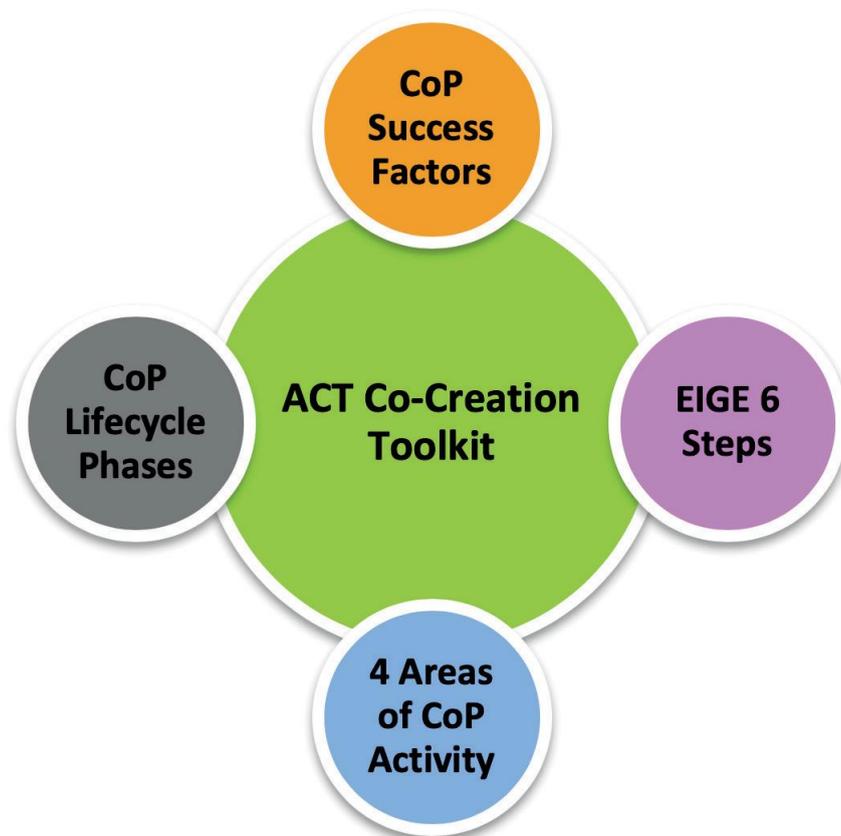
Figure 2. Theoretical Framework Supporting the Toolkit

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 to 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.

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[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.

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[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.

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[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 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 foster 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 a more active participation of the CoP members, as they notice and experience the benefits of using best practices. Retna and Ng (2011) discuss that CoPs consist of different domains of knowledge. The success of a CoP is based on the fact that those domains are dynamic and strategic which means that they exchange 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 regularly or in case of virtual CoPs (Fontainha and Gannon-Leary, 2008). In this case communication (e.g. online meetings) can be facilitated by those communication tools.

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 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.

She furthermore explains the importance of building a sense of belonging in the members of the community. As explained before those aspects ultimately lead to a higher commitment of the CoP members as well as a deepened identification of them with their CoP. Those aspects are also part of Fontainha and Gannon-Leary's (2008) argumentation. Besides common values and a shared understanding, they argue that trust between the CoP members is also an important aspect for a CoP being successful. They also 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. They 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 as well as 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 stepping over their boundaries, CoP members get access to other people working on the same problem and experts. Contact with people outside the CoP and in other networks have the same effects as mentioned above: Not only 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 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, experience, 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 the leader (e.g. CEO of a company) is committed to the CoP as well. This can inspire the 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, too. Similar to the arguments of Retna and Ng, Akhavan, Marzieh and Mirjafari (2015) recognise the importance of leadership support. They argue that a supportive leadership leads to optimised interactions. This shows 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 already (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).
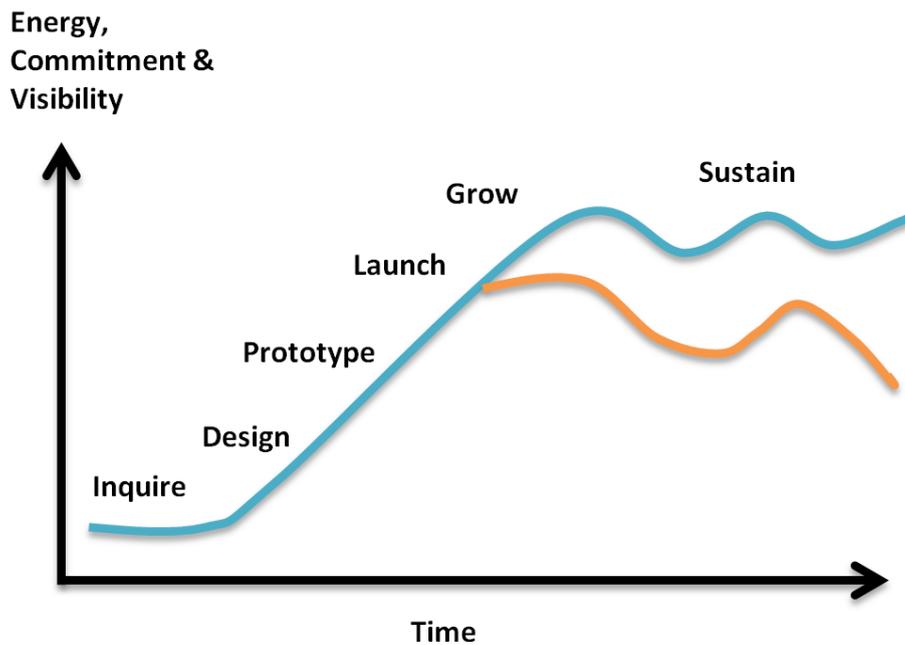

Figure 4. CoP Lifecycle Phases. Adapted from Cambridge et al., 2005.

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.
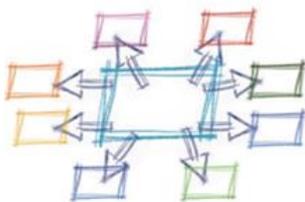
The purpose of learning and developing a shared practice, based on an existing body of knowledge underscores this area of activity. The community helps to evolve the practice as a collective product, which becomes integral to members' work and is reflective of their perspectives. It is important to balance 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.
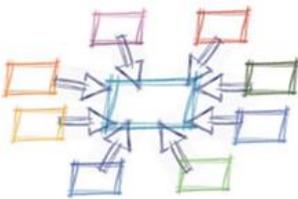
Creating Knowledge in the Domain

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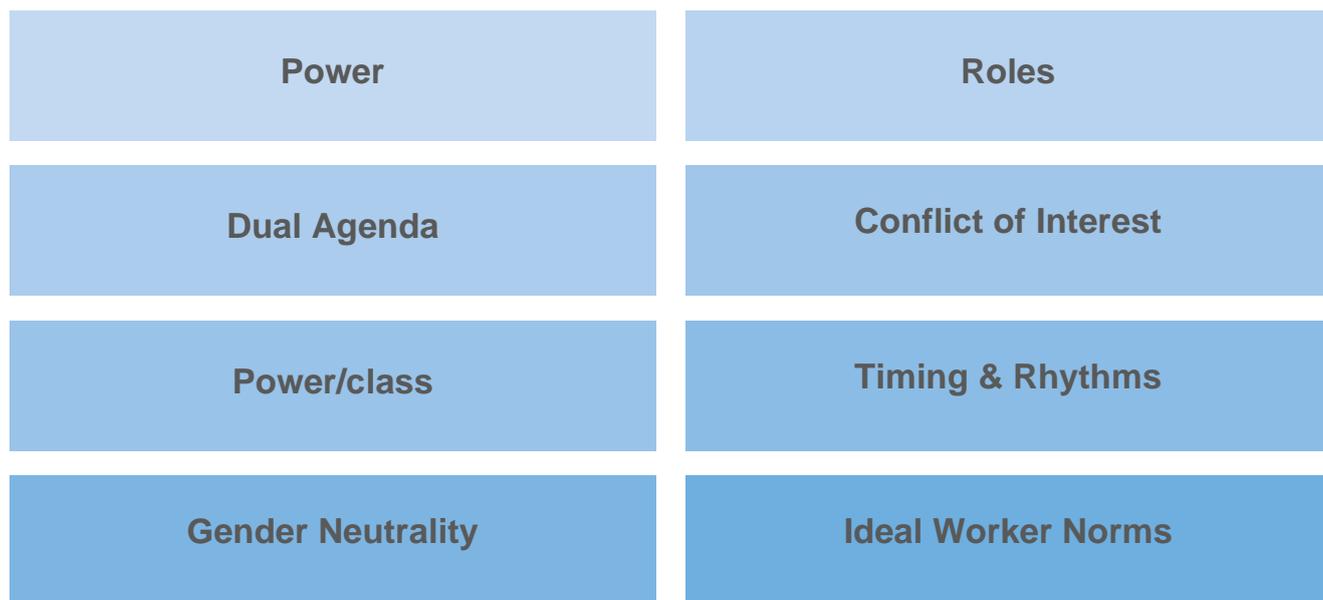
Figure 5. Acker's eight contradictions in GE projects.

#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

What: Participatory methods include various activities and tools which all have the same goal: to facilitate that everyone can take over an active and influential part in decision-making, planning and implementation. They aim at making sure that everyone can share his or her opinion, which is really being heard and to influence the outcome or future activities in their organisation. Most important to keep in mind is actively involving people in decision-making that do not belong to the actual circle of decision-makers of an organisation. Depending on the context this could mean involving average citizens in e.g., policy processes or co-workers in a project. Participatory methods are valuable because they take into account the worth of knowledge and experience exchange which is one aim of this toolkit: promoting knowledge and experience exchange between CoP members and across CoPs by facilitating their communication, participation and exchange.[5]

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 at the end.

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.

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.

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[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

QUICK GUIDE PARTICIPATORY METHODS	GROUP SIZE	FACE-TO-FACE / ONLINE	PAGE
1-2-4-ALL	Unlimited	Face-to-face / Online	34
ARGUMENT MAPPING	Unlimited	Face-to-face / Online	39
BRAINSTORMING	3-6 per group	Face-to-face / Online	48
CRITICAL UNCERTAINTIES (THEORY OF CHANGE)	4 groups with 4-6 people each	Face-to-face / Online	55
DAKI (DROP ADD KEEP IMPROVE)	Unlimited	Face-to-face / Online	60
FISH BOWL	Unlimited	Face-to-face / Online	65
FIVE-MINUTE FAVOUR	Unlimited	Face-to-face / Online	68
FOCUS GROUPS	Up to 12 per Focus Group	Face-to-face / Online	70
FOUR QUADRANTS	Up to 30	Face-to-face / Online	73
FUTURE WORKSHOP	5-20	Face-to-face / Online	76
HEART HAND MIND	5-15	Face-to-face / Online	80
HOW NOW WOW	1-30	Face-to-face / Online	84
INTERVIEWS	5-8 key informants	Face-to-face / Online	88
LIGHTNING DECISION JAM	Small to medium sized groups	Face-to-face / Online	91
MATURE YOUR IDEAS	3-6 per group	Face-to-face / Online	96
MENTORING CIRCLES	6-8 people per mentoring circle	Face-to-face / Online	99
NINE WHYS	Unlimited	Face-to-face / Online	102
PERSONAS	8-30	Face-to-face/Online	106
PLAN OF CHANGE (THEORY OF CHANGE)	8-25	Face-to-face	109
SMART CRITERIA / GOALS	1-8	Face-to-face / Online	114
STINKY FISH	Up to 30	Face-to-face / Online	119
SWOT AND PESTEL	8-12 people	Face-to-face / Online	122
W3: WHAT, SO WHAT, NOW WHAT	Unlimited number of groups, 5-7 people per group	Face-to-face / Online	127
WHAT I NEED FROM YOU	3-7 groups. The size of the groups is not limited	Face-to-face / Online	131
THE WORLD CAFÉ	Large groups (12 people or more)	Face-to-face / Online	134

NEW

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

ADAPTABLE ONLINE

There are different applications that can be used for online meetings (also multiple use at the same time) that 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/

Things to consider

- In advance, detailed emails to all participants will have to be sent about how to access, download, and navigate the platforms. If you are using multiple applications at the same time, make sure you make this 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 planned.

- It is best to conduct any method online if 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 get 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 are likely to be very limited, **special attention needs to be paid** to activities aimed 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.
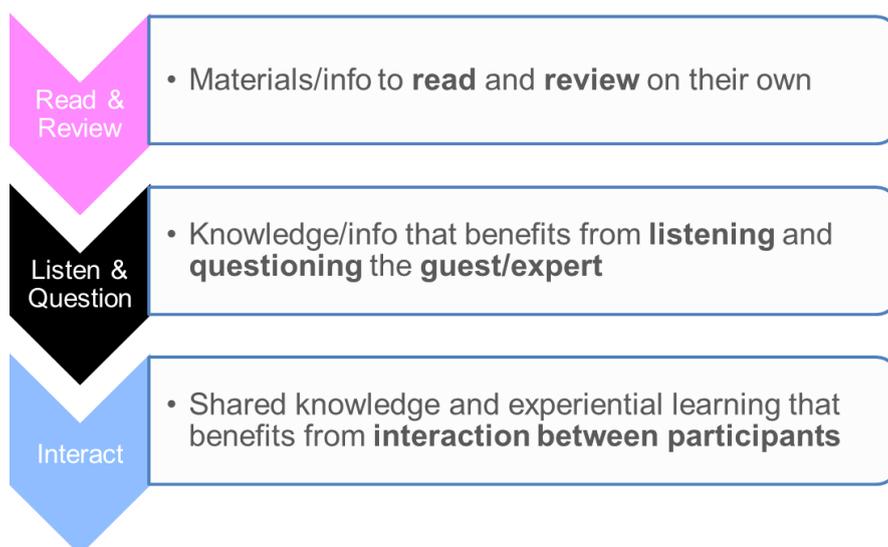
Consider inviting **virtual cameo appearances** by GE experts/special guests.

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]:

Read & Review
• Materials/info to **read** and **review** on their own

Listen & Question
• Knowledge/info that benefits from **listening** and **questioning** the **guest/expert**

Interact
• Shared knowledge and experiential learning that benefits from **interaction between participants**

Synchronous (S - during) & Asynchronous (A - before or after) participation[78]

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
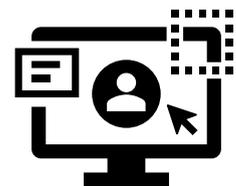
Consider your group size[9]

- **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/

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