

BLENDED **TRANSFORMATIVE** LEARNING

Or 'Things you need to know and be able to do, to change the world positively at individual, the local and system levels!'



Erasmus+

THANK YOU

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BLAST PROJECT

Background

The BLAST partnership is funded by: European Union Erasmus+ KA2 Strategic Partnerships Programme and has been set up to interweave three key concepts and respective sets of practices that have mostly evolved independently from each other in the past decades: Blended Learning (BL), Transformative Learning (TL) and Socio-ecological Transition (SET).

There are four key outputs from this project:

- Communities of Practice Guide..... 8-16
- Competency Framework..... 17-34
- Catalyst Toolkit..... 56-78
- T4T Curriculum..... 78-98

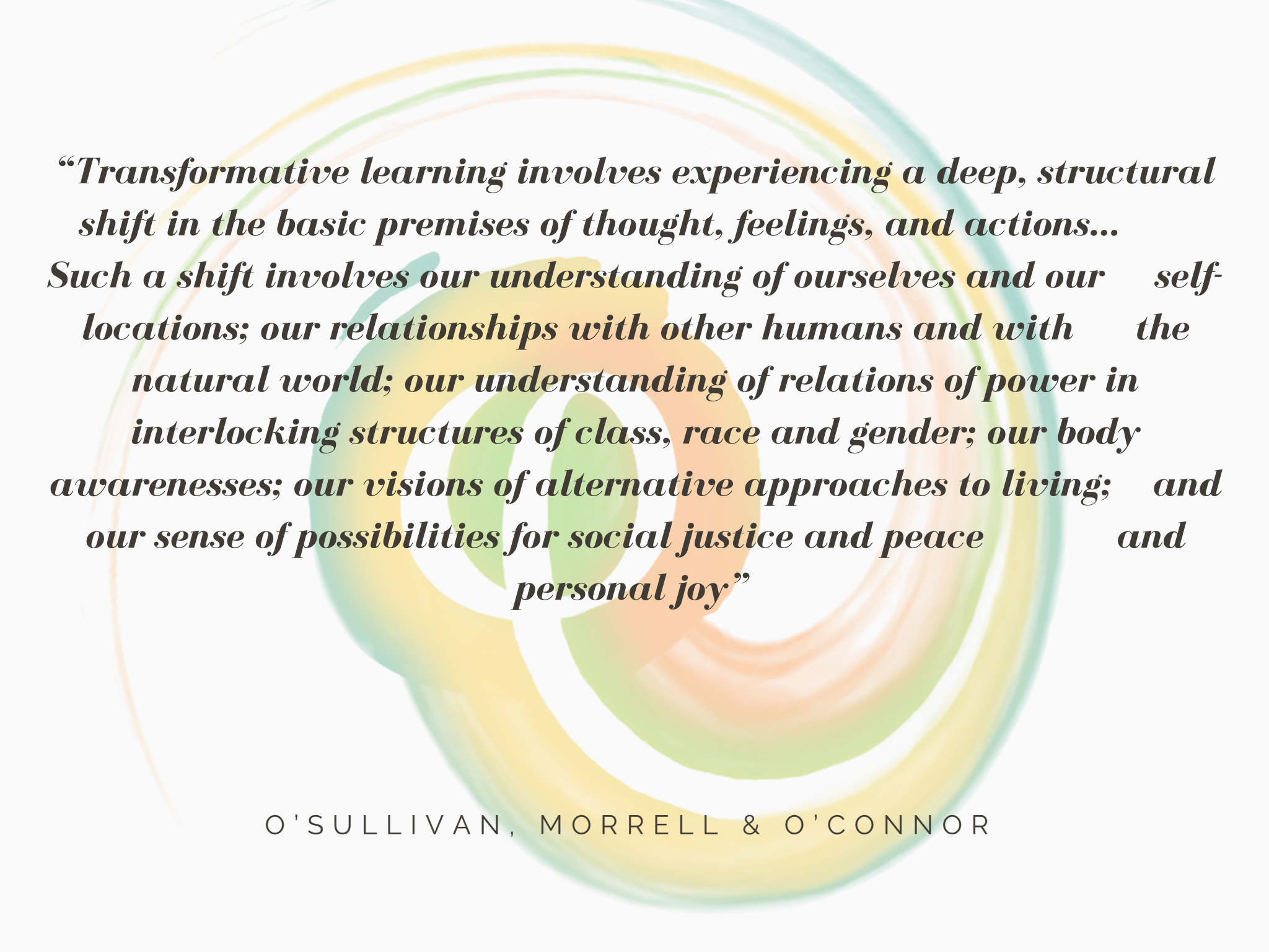
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- ECOLISE | Lead
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“Transformative learning involves experiencing a deep, structural shift in the basic premises of thought, feelings, and actions... Such a shift involves our understanding of ourselves and our self-locations; our relationships with other humans and with the natural world; our understanding of relations of power in interlocking structures of class, race and gender; our body awarenesses; our visions of alternative approaches to living; and our sense of possibilities for social justice and peace and personal joy”

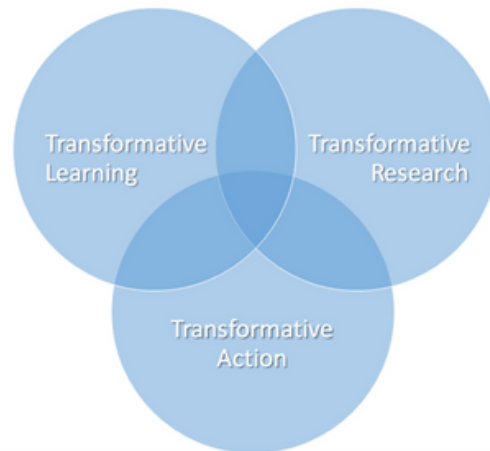
O'SULLIVAN, MORRELL & O'CONNOR

What Is Transformative Education?

Transformative education (*educere: leading out*)

= transformative learning + transformative research + transformative action at individual, organisational, community and societal levels

“Transformative learning involves experiencing a deep, structural shift in the basic premises of thought, feelings, and actions. It is a shift of consciousness that dramatically and irreversibly alters our way of being in the world. Such a shift involves our understanding of ourselves and our self-locations; our relationships with other humans and with the natural world ...” (O’Sullivan, 2003)



“Transformative research supports transformation processes in practical terms through the development of solutions and technical as well as social innovations, including economic and social diffusion processes and the possibility of their acceleration, and demands, at least in part, a systemic perspective and inter- and cross- disciplinary methods, including Stakeholder participation.” (WBGU, 2011)

Transformative action: see Buckminster Fuller’s trim tab metaphor, Donella Meadows leverage points, Otto Scharmer’s acupuncture points, Gerald Midgley’s systemic interventions, Scott Sherman’s components of transformative action ... See also system innovation, systemic change, transition, integrative / integral / regenerative development...

[MORE ON WIKI](#)



What Is Blended Learning?

Blended learning is considered a combination of traditional f2f modes of instruction with online modes of learning (OL), drawing on technology-mediated instruction, where all participants in the learning process are separated by distance some of the time. Skrypnyk et al, 2015, p. 62

Blended Mobility

BM

20 participants from different countries register for a blended workshop. They come to know each other first in preparatory online meetings, and then each travel to a single venue for immersive interactive experiences. Once home, they meet again online after this in-person workshop for exchanges on how they apply their learning in their respective places.

Blended Community of Practice

CoP

A group or network of practitioners who meet regularly online and in-person, often according to an agreed schedule, sharing knowledge, problems, solutions, information and news about a specific issue that they care about. In doing so, they extend group learning through ongoing reciprocal interactions that generate tangible outputs, increases the potential to change behaviour and mindsets and thereby generate shifts within systems.

Blended Course

BC

Following a course or learning pathway over time that moves through different levels or themes in learning, with some elements online and some element in-person. For example: site visits in different countries, pooling insights from across countries or a course that is taught partially online and partially in person, for example over a series of long weekends at relevant venues.



[MORE ON WIKI](#)

The BLAST project recognises a new understanding of BL as an emerging set of systemic change practices for accelerating socio-ecological transitions that includes and transforms the traditional understanding of BL.



Photo by Andras Vas on Unsplash

This increasingly widely understood concept of blended learning is the focus used within this framework, although a new and broader concept of blended learning is also explored in the BLAST Overview Document.

[Transformative Ecologies of Learning](#)

What Is Socio-Ecological Transition?

Socio-ecological transition is the process through which society as a whole, and therefore its communities, structures and individuals move from the current unsustainable state to a socially and ecologically sustainable state.



Photo by Evie S. on Unsplash

Transition therefore represents an outcome, as well as a process, that puts in place the elements and relationships at the macro and micro levels that are essential for generating and maintaining resilient communities, ecologies and socio-economic systems. Together, these elements embody a form of dynamic, responsive stability in their system as a whole, as well as the key sub-systems that make up the whole. Socio-ecological transition embodies key characteristics of sustainability such as more equitable systems, social justice and inclusion (within and between generations), and circular net zero carbon and waste economic systems. Socio-ecological transition is fundamentally a process of transformative learning, at an individual and collective level, that is focused on learning how to individually and collectively transform ourselves to generate a regeneratively sustainable culture from the household and local level to the level of society as a whole.

For the BLAST partnership, this is where the discourses and practices of active and planetary citizenship, social and environmental activism and TL need to flow together.

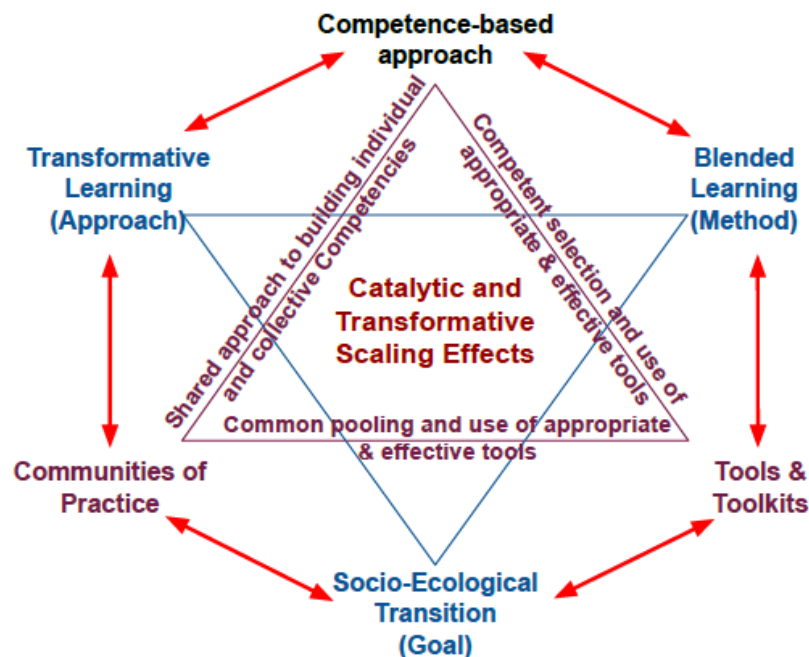
The understanding of an activist transformative stance being fundamental for, rather than an optional add-on to (adult) learning, helps us with this task:

“Collaborative purposeful transformation of the world is the core of human nature and the principled grounding for learning and development.”



BLAST Outputs and Approach

The diagram below indicates the key relationships between transformative learning, blended learning and socio-ecological transition that the BLAST project aims to catalyse. It also illustrates the beneficial relationships between critical areas of activity that support the catalysing and scaling of transformative change, which have been developed by the complementary BLAST outputs, so that our **Competence Framework** can be understood within the context of **Communities of Practice**, which also identify, develop and use a shared **Toolkit** for use in different situations. Additionally during our **T4T** we have explored the key competencies educators and communities need to build to support the transition.



The Overview Document "Transformative Ecologies of Learning" provides a more detailed explanation of these relationships and their value.

[LEARN MORE](#)

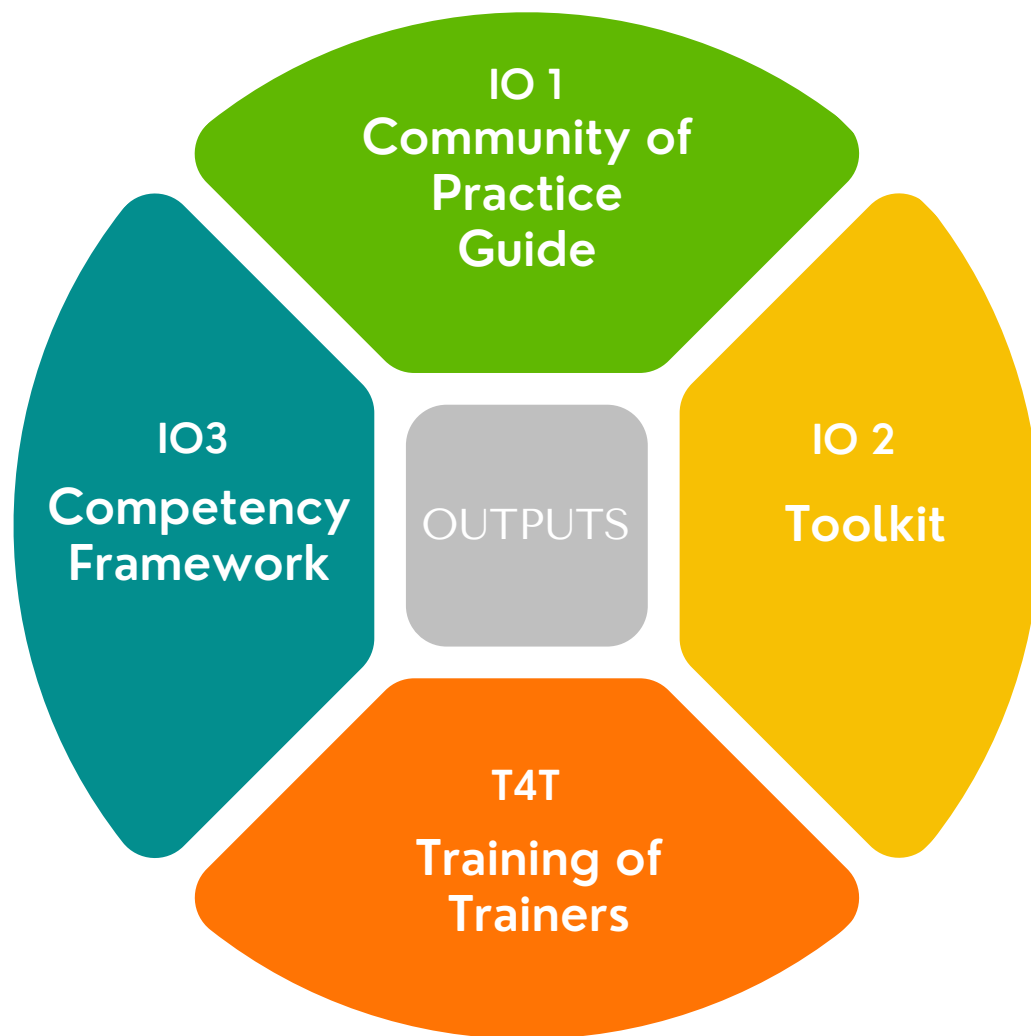
For online readers: clicking "learn more" will link you to the Communities for Future Wiki for a more detailed description or to the source of information provided.

For readers of a print version: you will be linked to the Wiki via the bar codes.



PROJECT'S OUTPUTS

**BLENDED
TRANSFORMATIVE
LEARNING**



<https://www.hostingtransformation.eu/blast/>

Community of Practice

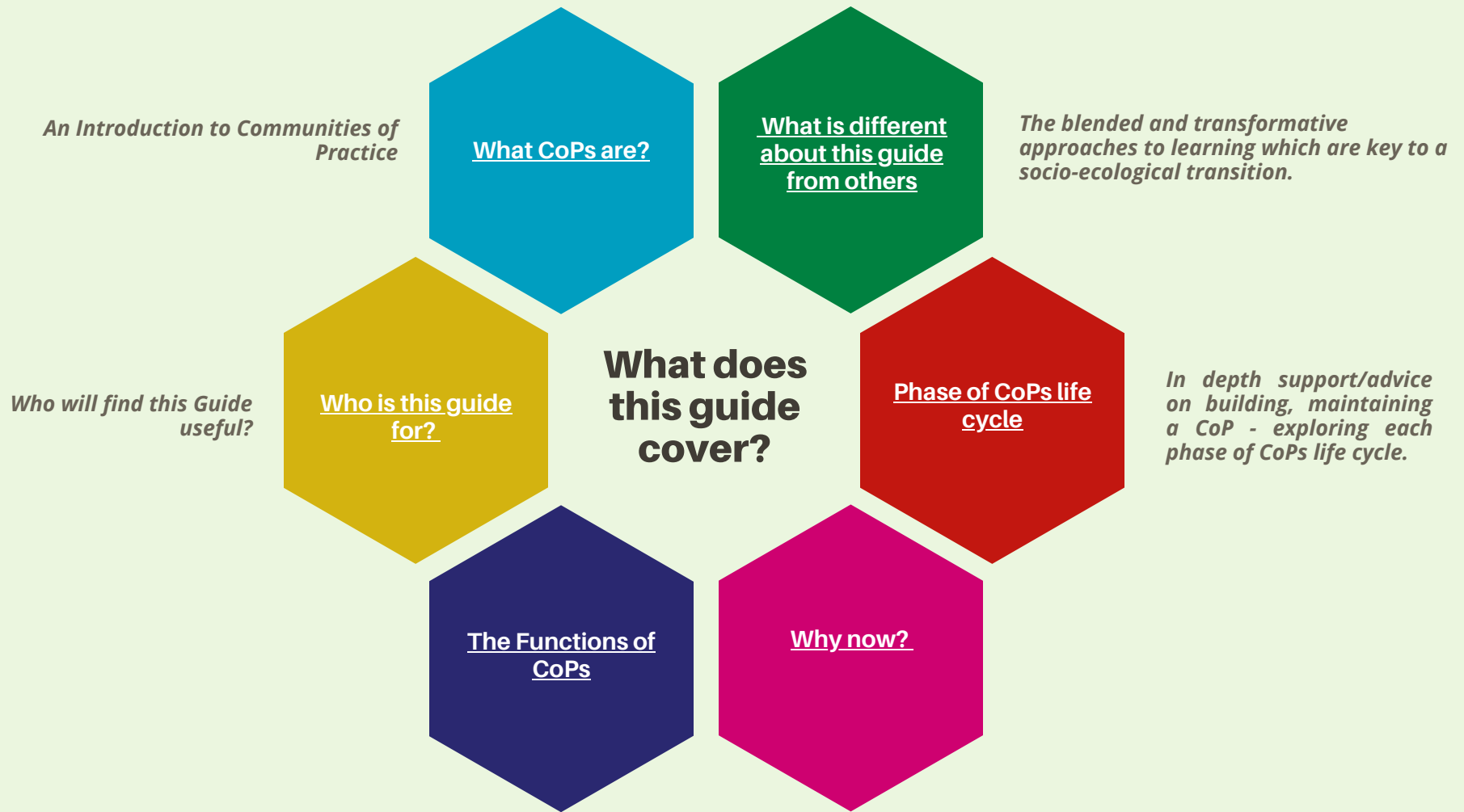
GUIDE



“CoPs enable people doing related work or facing similar challenges to share their knowledge and solutions and as a result achieve the greatest good for the greatest number.”

WHEATLEY & FRIEZE

Community of Practice Guide



This CoP guide specifically addresses:

- how to create blended learning environments that combine virtual and face to face interaction;
- how to build equitable, diverse and inclusive CoPs
- how to support transformative learning to take place

Special attention will be given to the running of a CoP including following key patterns:

- Enrolling participants
- Facilitation of meetings
- Documenting
- Working with diversity
- Curating shared knowledge
- Empowering self-organisation
- Building capacity and widening participation
- Attracting resources for joint funded activities
- Stimulating reflective monitoring and evaluation
- Interweaving people, teams, organisations, networks

An Introduction to Communities of Practice

THE CONCEPT

Communities of Practice (CoP) was first introduced as a concept by Jean Lave and Etienne Wenger (1991), who referred to a group of people sharing knowledge, problems, solutions, information and news about a specific issue, and who extend group learning through reciprocal interaction (Wenger et al., 2002). Originally CoP participants were from the same business, organisation or academic departments who would meet regularly face to face. Nowadays CoPs are taking shape both within organisations and between organisations as well as within and across disciplines and sectors.

CORE DIMENSIONS

A community of practice defines itself along three dimensions, that mutually influence each other and should be kept in balance.

Domain

This is the area of shared interest, topic or issue that the community cares about. The domain needs to be negotiated with the stakeholders of the CoP and evolves along the context and community.

Community

This is a group of people who build personal relationships and learn together through discussions, activities and regular interactions. Enough common ground and diversity makes for richer learning, more interesting relationships and increased creativity. Community members can take on different roles to maintain and nurture the CoP, all communities change in structure as they grow. In a community of practice, the focus extends beyond the needs of the group. There is an intentional commitment to advance the field of practice, and to share those discoveries with a wider audience. A CoP makes their resources and knowledge available to anyone, especially to those doing related work.

Practice

This is the body of knowledge, methods, stories and tools being developed. The practice covers frameworks, and documentation of ideas, experiences, lessons learned. Successful practice building goes hand in hand with community building. These three elements form together an ideal knowledge structure as a social structure which can take over the responsibility for stewarding a specific domain of learning and expertise.



Who is this guide for?

This guide has been designed to make it easier for facilitators, trainers, community catalysts and adult educators working in civil society organisations and networks, to build and maintain well-functioning peer learning communities and to nurture them with ease and joy.

Beyond tangible outputs like innovative tools, methods, products, improved processes, a CoP has the potential to widen perspectives, change behavior and mindsets on an individual and collective level and can thus be considered as system shifting. In socio-ecological transition movements - such as permaculture, transition networks and eco-villages - CoPs have the potential to become systems and spaces that have real power and influence. Pioneering efforts that have hovered at the periphery can become the norm and practices developed by courageous communities can become accepted standard. When people have environments in which they can learn and explore with ease and curiosity, they no longer hesitate about adopting new approaches and methods.



Learning communities and communities of practice are sometimes considered as if they were different entities. However, Wenger (1998) generally follows this principle:

For individuals . . . learning is an issue of engaging in and contributing to the practices of their communities. For communities . . . learning is an issue of refining their practice and ensuring new generations of members.

The difference between learning and practice communities could be a matter of emphasising some processes over others or some interpretations. For us, this is not so much a question of whether a community of practice can become a learning community, but what sort of learning the particular community of practice fosters. The nature of the learning practice will determine whether the learning is predominantly transformative or reproductive.

LEARNING
COMMUNITIES

Why now?

THE CLIMATE

The scale of change required to respond effectively to the climate and nature emergency is nothing short of revolutionary. We need super effective action, and in order for that to happen, we need super effective learning. CoPs create a context within which we can become super effective action-learners, and where we can share and learn that practice with others.

NATURE EMERGENCY

"Communities of practice are of vital importance because through them, people grow the necessary capabilities and structures that enable a new system to emerge—not as a social movement taking over institutions by force, but by growing into a System of Influence and thus becoming the new mainstream, making old structures obsolete." George Pór

SOCIAL INJUSTICE

CoPs are subject to the same historial, cultural and social influences around how power and rank between organisations, groups and group members are distributed and upheld. To not replicate oppressive systems, CoPs need to build this intention into visioning, value setting and ongoing practice. In fact, CoPs can be one of the ways that these systems are dismantled - as spaces of recognising our interconnectivity and how our liberation is wrapped up in each other.

TECHNOLOGICAL ADVANCEMENTS

" #Blacklivesmatter #Metoo

Once individuals link together they become something different. . . . Relationships change us, reveal us, evoke more from us. Only when we join with others do our gifts become visible, even to ourselves." Margaret Wheatley and Myron Kellner-Rogers

COVID 19

The global pandemic has led to a surge of skills and engagement with the online sphere and many people who can are now 'working online' for jobs that were previously in an office. Many people are more familiar with apps like zoom and google docs and feel more confident to go further and connect with people in new ways. With these new skills and experiences, opportunities have opened up to connect new people into virtual or blended communities of practice, especially where geography was previously felt to be a barrier. However, Covid 19 has also highlighted the disparity between those who have access to reliable technology and support and training to use it - and those who do not. Accessibility is a key consideration in deciding whether and how to shape any CoP with an online element.

The fundamental nature of work is changing. Organisations have to become more networked, not just with information technology, but in how workers create, use, and share knowledge. Continuous learning is a critical part of working in a creative economy. We will have to create new work and learning models to help us deal with the transition in the next phase in human civilization where influence and respect replace command and control.

CoPs are part of a range of complementary approaches for driving system transitions, including community-led initiatives, action research projects, social innovation/future labs, action networks/cross-sector partnerships, and sustainability-oriented ecologies of learning. CoPs offer a peer-based, decentralized, self-organized space that support transformative learning through social interactions.

The Functions of CoPs

Communities of Practice are multi-functional entities which can be designed and adapted to suit the context, the community and areas of interest of the community. The functions of a CoP may be any one or more of the following:



Connect people who might not otherwise have the opportunity to interact, either as frequently or at all.



Provide a shared context for people to communicate and share information, and in a way that builds understanding and insight.



Enable dialogue between people who come together to explore new possibilities, and create new, mutually beneficial opportunities.



Stimulate learning by serving as a vehicle for authentic communication, mentoring, coaching, and self-reflection.



Capture and share existing knowledge to help people improve their practice and a process to collect and evaluate best practices.



Introduce collaborative processes to groups and organisations to encourage the free flow of ideas and exchange of information.



Provide a space for experimentation that can be self-organised and decentralised.



Help people organise around purposeful actions that deliver tangible results.



Generate new knowledge to help people transform their practice to accommodate changes in needs and technologies.



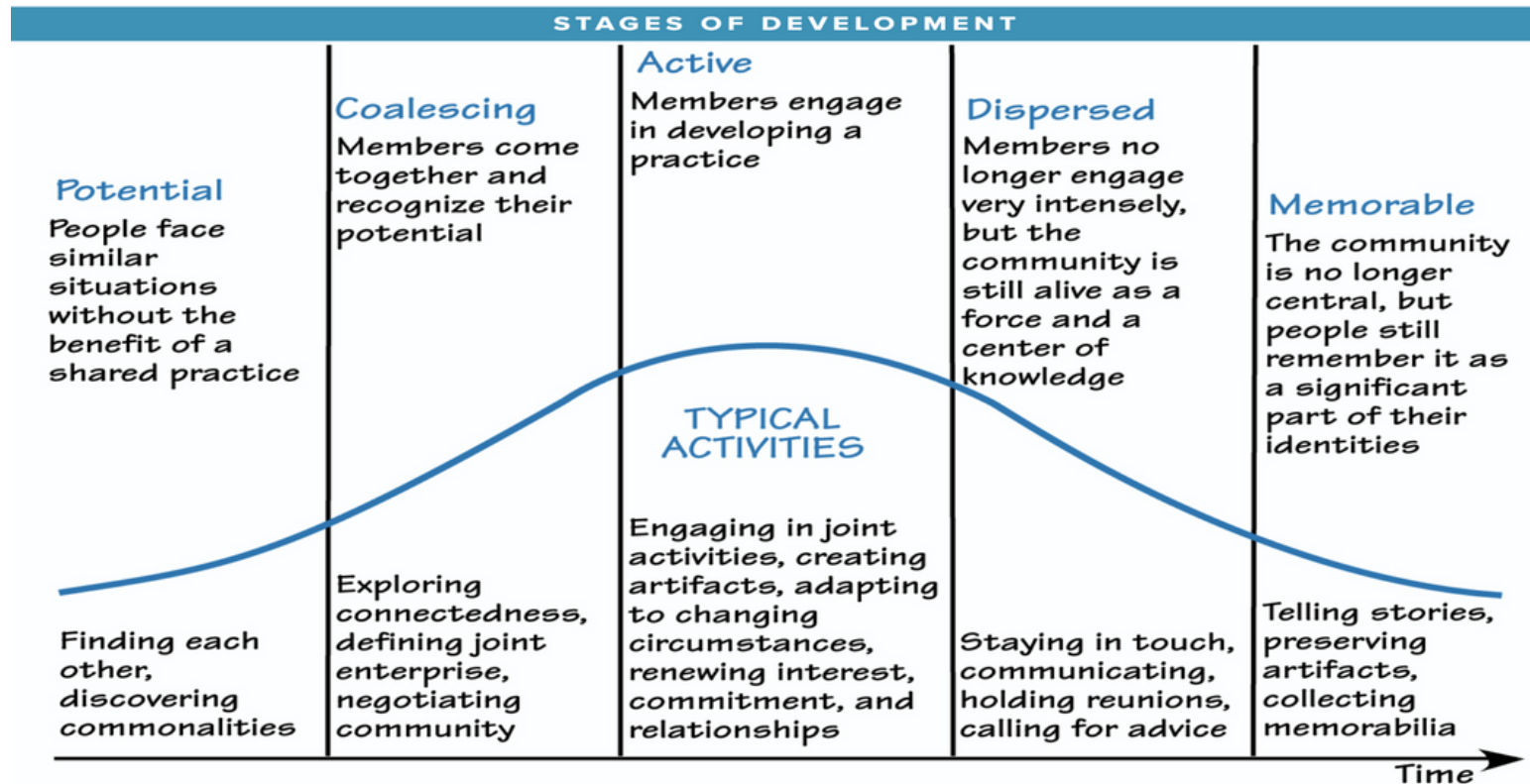
Break down silos and create shared value.

“You know you are in a community of practice when it changes your practice.” Harold Jarche

The Life Cycle

Communities of practice develop through various stages and each stage has a different set of activities and interactions through which they will develop.

Often CoPs begin with a loose network of people who recognise common interests around a key issue. They may gradually establish the value of sharing knowledge and develop relationships and sufficient trust. When they become fully active, they clarify the CoP's focus, role and boundaries. The community must maintain its relevance and its voice, keep the tone and focus lively and engaging, and keep itself on the cutting edge in order to survive. They will naturally transform or die. Sometimes communities split into new communities or they merge with other communities. Sometimes they lose relevance or achieve their original purpose and come to an end.



Communities of practice move through various stages of development characterized by different levels of interaction among the members and different kinds of activities.

Source: Wenger, McDermott, and Snyder, 2002, p 69

Blended and Transformative CoPs for Socio-Ecological Transition

Blended approaches to CoPs are important for supporting learning around because they:

01

Improve accessibility to learning by reducing the cost of engaging, allowing 'anytime learning', removing the need for the learner to find learning support that is close by.

02

Reduce carbon emissions from people travelling to an on-site event.

03

Facilitate a longer term approach to capacity building, which provides participants with more opportunities to put the learning into practice in their own context;

04

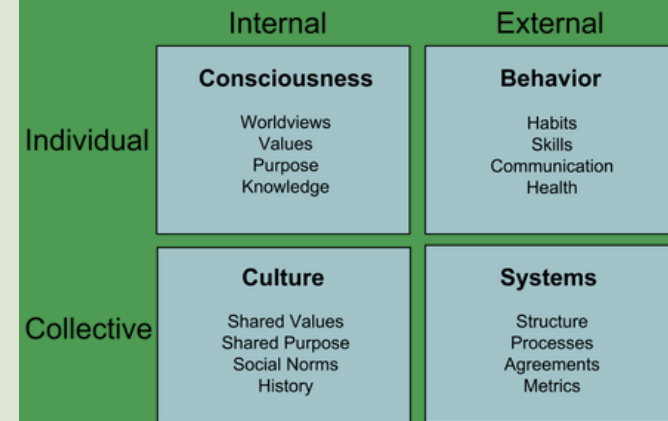
Facilitate informal learning through conversation, meet-ups, chats where a learning goal has not been pre-defined.

05

Allow learning and support to take place in real time e.g. you can reach out to others when you need support with an active issue;

Transformative learning in the context of socio-ecological transition is particularly focussed on an approach that generates transformative outcomes in the inner; outer; individual and collective realms.

See Wilber's Four Quadrants below:



Visit also the [Website](#) from the Integral Institute for more information.



ADDITIONAL
LEARNING

The concept of 'blending' comes from Blended learning which is typically defined as any form of learning which combines both in-person/on-site and online elements.

Critical to the definition is "online learning, with some element of student control," otherwise, blended learning is no different from a facilitator beaming online curriculum to participants through an electronic whiteboard.

Blended CoPs

Another important aspect of blended learning is "an integrated learning experience" This means that the online and face-to-face components work together to deliver an integrated course.

CoPs for the Socio-Ecological Transition

Blended and Transformative CoPs for the Socio-ecological Transition

Equity, Diversity & Inclusion in CoPs

Socio-ecological transition embodies key characteristics of sustainability such as more equitable systems and social justice (including racial equity, gender justice, disability justice, food justice, land justice and queer and trans liberation) (within and between generations), circular economies and agroecological farming.

Transformative CoP

Transformative learning in the context of socio-ecological transition is particularly focussed on an approach that generates transformative outcomes in the inner; outer; individual and collective realms. The transformative potential of a CoP is to become a system that has real power and influence.

A major critique of grassroots environmental movements is their tendency to decouple their concerns, goals and activities around climate change and sustainability from issues around social justice. This leads to solutions being identified which risk perpetuating social injustice, where the needs of only some groups are met, i.e. 'saving the climate for who? / who enjoys the benefits?' It can also lead to the group itself being more likely to perpetuate inequality, exclusion or oppressive practices by not including an explicit reflection and critical analysis of how power manifests within its culture and structure. [Read more](#)



MORE ON WIKI

Definitions of Key Terms

Terms around this theme are highly contested as each term is understood, used and actioned in different ways depending on the way it is being interpreted.

EQUITY

Equality giving everyone what they need to be successful. Equality is treating everyone the same. Equality aims to promote fairness, but it can only work if everyone starts from the same place and needs the same help.

INCLUSION

Inclusion is commonly defined as the extent to which everyone at work, regardless of their background, identity or circumstance, feels valued, accepted and supported to succeed at work. When practicing 'inclusion', it is important to be aware that those people representing 'difference' are not pressured nor forced to assimilate into a dominant culture or system that marginalises them in order to be 'included'.

DIVERSITY

Diversity refers to demographic differences of a group – often at the team or organisational level. The term 'diversity' is contested as it can individuate experience, conceal inequalities and neutralise histories of antagonism and struggle. To overcome these risks, critics encourage an exploration of questions such as: how does 'diversity' work in any given context, what counts as diversity, who does 'diversity' work, and who is seen to 'embody diversity'? In other words, rather than trying to ask 'what is diversity?' ask 'how is it being (or not) integrated into organisations' (Ahmed, 2006)?

JUSTICE

Dismantling barriers to resources and opportunities in society so that all individuals and communities can live a full and dignified life.

"Intersectionality is the interconnected nature of social categorisations such as race, class, and gender, regarded as creating overlapping and interdependent systems of discrimination or disadvantage".

Oxford Dictionary

ACCOUNTABILITY

Dismantling barriers to resources and opportunities in society so that all individuals and communities can live a full and dignified life.

Developing a CoP - Phase by Phase

This guide will follow the model below which sets out the various stages of developing a CoP into which we will incorporate considerations for creating a blended CoP focused on transformative learning.

CELEBRATE

Review the CoP, evaluate member experience and celebrate achievements. Check it is still relevant and useful and transform or archive as needed.

CULTIVATE

Engage members in collaborative learning and knowledge sharing activities, group projects, and networking events that meet individual, group, and organisational goals while creating an increasing cycle of participation and contribution.

OBSERVE

Through a process of exploration and inquiry, identify the audience, purpose, goals, and vision for the community.

DESIGN

Define the activities, technologies, group processes, and roles that will support the community's goals.

PROTOTYPE

Pilot the community with a select group of key stakeholders to gain commitment, test assumptions, refine the strategy, and establish a success story.

LAUNCH

Roll out the community to a broader audience over a period of time in ways that engage newcomers and deliver immediate benefits.



CoPs by Phase

PHASE 1:

Observe and Inquire



Audience:

Who is this community for?

Who are the community's important stakeholders?

Domain:

Given the intended audience, what are the key issues and the nature of the learning, knowledge, and tasks that the community will steward?

Purpose, Goals, and Outcomes:

Given the audience and domain, what is this community's primary purpose?

What are the benefits to the stakeholders? What specific needs will the community be organised to meet?

1.1 Observation of needs and gaps in support

Key to developing a healthy Community of Practice is to spend some time carrying out a needs assessment through informal discussions, formal interviews, surveys, and/or focus groups.

1.2 Identifying your members and clarifying boundaries

Some CoPs will have very clear and potentially rigid boundaries about who can, and can't be part of the CoP. A CoP focussed on midwifery is unlikely to accept brain surgeons, unless part of their learning is focussed in this area.

1.3 Embedding a CoP into an Organisation

George Por proposes that CoPs can be a forward thinking mechanism to foster innovation if they get the quality of attention and support that they need from the organisation(s) that gives rise to them. Measures to support that quality of attention include:

- Person-centric technical support
- Systems for knowledge harvesting, flow and weaving (such as personal and shared knowledge blogs)
- Training of learning facilitators, community hosts, cybrarians, and knowledge brokers
- A strategic framework for alignment with such functions as Research and Development (R&D), strategic management, knowledge and innovation management, and HR that supports the CoP's work

1.4 Developing a purpose, vision and values

Deciding on common values can form part of the process of defining purpose and creating a container for groups to share, learn and collaborate within a CoP. Key to deciding on values or ethics in a CoP is being clear about what they mean to the group and how they connect to any vision, purpose or strategy and how they will inform decisions.

In many communities of practice decisions need to be taken, conditions need to be put in place, strategic conversations need to be had. Not all members see value in being involved in these processes. Whether you call them leaders, co-ordinators, or stewards, someone needs to do it - and it is as well to recognize them for the role they play.

Personal work of understanding Power and Privilege

The way in which **identity and power** intersect is complex, particularly within group settings. There are a multitude of factors at play in how power and identity interact (political, economic, historical, cultural and contextual - including roles and organisational setting).

Furthermore, the ways in which identities intersect within an individual gives rise to complex layers of both **privilege and oppression** - even within the same individual, let alone a group. Some groups are privileged on the basis of their identity - such as their gender, ethnicity, race, class, ability - with access to power, accumulation of assets, safety, comfort, self-determination and anonymity etc whilst others are excluded from or have to work harder for the same resources and systematically experience unequal treatment, discrimination, and structural and institutional barriers. Much of this will remain unconscious - particularly to those experiencing privileges - which they may perceive as 'entitlements' or the result of one's own hard work.

Conversations around identity and power are often highly emotive given what is at stake, especially if people with less privilege feel their experiences are not being validated nor heard or actively denied; that speaking up further disadvantages or alienates them; or that they are being blamed for another's experience. Victim blaming and defensiveness are a common occurrence when power and privilege and systemic oppression are pointed to.

People with more privilege may perceive that their worldview is in question, and without the tools to integrate these new perspectives, may feel uncomfortable and even panicked, shutting down the conversation and generating greater pain. Because of these complexities, the conversation is often avoided altogether.

Not addressing the issue is itself a practice of entrenched privilege and dominance that preserves the status quo, because - for those with more privilege - not engaging in such topics is a choice, as they may justify that it does not relate to them, or that they cannot change anything or that it is too hard or not a priority. This choice itself exemplifies privilege (as for those with less privilege, their everyday lived realities do not afford this choice) and it serves to allow those with more privilege to avoid feeling discomfort or working through strong emotions such as defensiveness, shame, guilt or apathy, which in turn lead to avoidance or inaction.

However, self-reflection and communication are key to understanding power and how it shapes us and the groups we form. Thus engaging with this inquiry from early on in a group process can be deeply liberating, encouraging and connecting for all involved and lead to healthier, more authentic interactions, and more impactful groups.

LEARN MORE

Social inequality not only permeates through social and economic structures, it also gets internalised into our individual and collective consciousness.

When group members have a **deeper understanding** of their own relationship with power and how that relates to how social systems are upheld or dismantled, they can bring their values in line with their behaviour, **dismantling those biases and prejudices** that they have internalised through their socialisation.

They can **build common language and communication** channels to more deeply express and understand theirs and others' experiences.

They can **build trust** and mutually supportive contexts. And they can build greater resilience to work through challenges and conflicts as they inevitably arise.

They can **become true partners** in addressing social inequity.

SOCIAL
INEQUALITY



Phase 1. Considerations for Transformative CoPs

Having a defined audience or 'community' is one of the three core elements of a CoP along with the domain and the process. This defined audience consists of the main group of people who will make key decisions and shape the direction, process and culture of the CoP - in other words the DNA of the community.

WHO SETS THE DNA OF THE COP?

If the 'DNA' is set by a founding group, and if that founding group doesn't represent diversity of people, experiences and perspectives, then it can be more challenging to shift this at a later stage. The needs and desires of diverse groups need to be part of building the community in the early stages.

CONSIDERING LANGUAGE

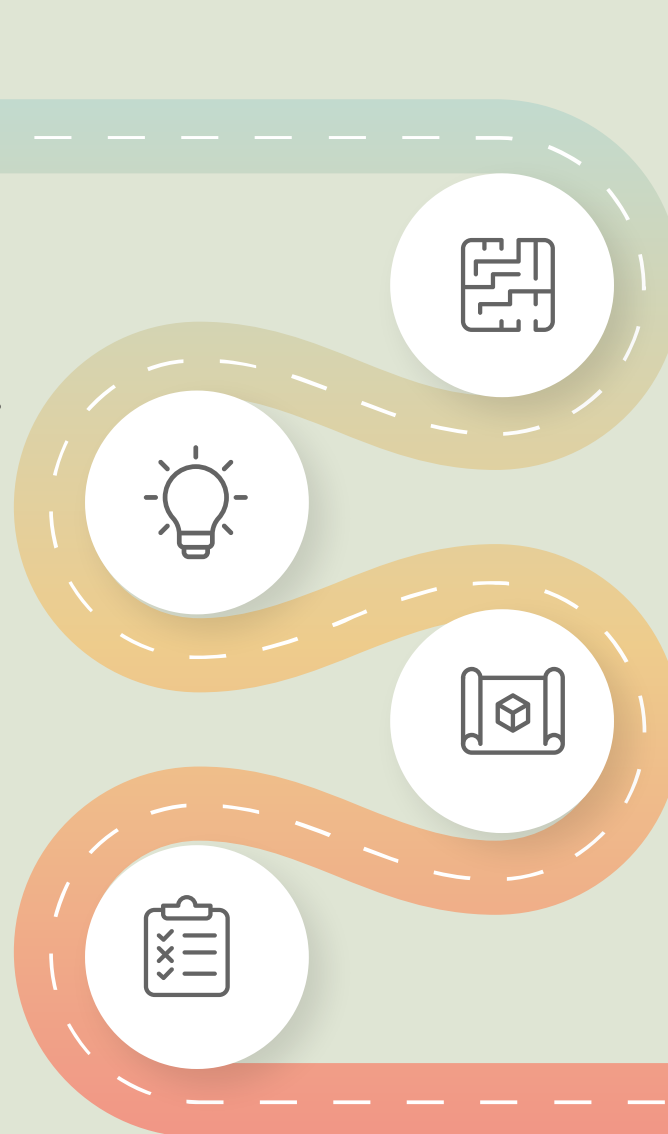
When we come together to dialogue, it is important that we are able to express ourselves in the language that most fully conveys the depth and nuance of our hopes and ideas, our frustrations and questions. And it is important that we feel respected as speakers.

A DIFFERENT BACKGROUND TO JOIN.

Different individual perspectives can be a source of creativity, growth, better understanding, community care and innovation when we learn to communicate with others in ways that connect us rather than separate us.

USING INDICATORS AND MONITORING AUDIENCE

Another option is to set protocols or collectively agree intentions about representation of different identities or backgrounds in any decision making/core/sub-groups. Then gather data and monitor who is part of the group (anonymous) to encourage transparency and reflection on desired versus actual audience.



Phase 1. Considerations for Blended Learning

Ethical impacts are likely to fall into five areas:

01

Environmental impact

02

Safeguarding and privacy

03

Lack of accessibility to individuals

04

The wider ethical impact of individual companies behind technology products used

05

Unintended negative consequences through disrupting the ecosystems and behaviours of the members of the CoP

"We cannot have a society in which, if two people wish to communicate, the only way that can happen is if it's financed by a third person who wishes to manipulate them."

Jaron Lanier

CoPs by Phase

PHASE 2:

Design

Activities:

What kinds of activities will generate energy and support the emergence of community presence? What will the community's rhythm be?

Learning & knowledge sharing:

What are the learning goals of the community, and how can collaborative learning be supported? What are the external resources (people, publications, reports, etc.) that will support the community during its initial development? How will members share these resources and gain access to them?

Collaboration: How will community members collaborate with each other to achieve shared goals?

Communication & interactions:

What kinds of interactions (with each other and with the content of the community) will generate energy, care and engagement? How will members communicate on an ongoing basis to accomplish the community's primary purpose?

Roles and Social Structures:

How will community roles be defined (individuals, groups, group leaders, community administrators, etc.) and who will take them on?

2.1 CoP Activities and Timing

Formal activities.

Agreeing regular ways in which the CoP will meet or engage with each other (e.g. meetings, check-ins, events) gives everyone a sense of the 'fixed' or formal practices of the CoP and a sense of the potential time commitment, effort and opportunities within the CoP for collaborating and sharing.

Informal and self-organised activities

There also needs to be an informal nature to the CoP which can arise and not be limited by the formal aspects. For this reason it is essential that a CoP has a communication system that allows members to talk to each other, independently of a central organiser.

Rhythm

Vibrant communities of practice also have a rhythm. When that rhythm is strong the community has a sense of aliveness. Consider what the community's "rhythm" will be.

2.2 Defining Tasks, Roles, Governance and Decision Making

Tasks & Roles

In order to encourage a sense of ownership within the community it is important to identify the roles within a CoP, so that members can put themselves forwards for tasks.

Distributing leadership throughout the community

Wenger advises that CoPs - even when arising spontaneously - require some form of leadership through those with recognized expertise.



“The very characteristics that make communities of practice a good fit for stewarding knowledge—autonomy, practitioner-orientation, informality, crossing boundaries—are also characteristics that make them a challenge for traditional hierarchical organizations.” Etienne Wenger

Sociocracy

Sociocracy 3.0 is a framework comprising a selection of principles based patterns - definitions, guidelines and flexible processes - that have proven helpful when collaborating to achieve shared objectives and can be used and adapted as needed by the community.

Sociocracy is an effective way of organising connections and is a mode of governance that allows for a group of people working together to behave like a living organism and self-organise. Often called dynamic governance, it is a highly structured method of governance that can be applied in a CoP.

Self-organisation: Self-organising CoP chooses how best to accomplish their work, rather than being directed by others from outside the system.

Circles: Authority in sociocracy is decentralised into circles with each circle having its own defined aim and making decisions by consent. Everything that needs attention in a CoP can be taken care of by a group of people called a 'circle'. The community maintains a structure for decision-making consisting of semiautonomous circles.

Participatory decision-making: Decisions in Sociocracy are made using consent decision-making, rather than consensus or majority voting. Decisions by consent are participatory and designed to remove all of the circle members' objections one by one so that, at the end, there are no objections. No decision can be taken while a participant makes a reasonable and argued objection; however, an objection commits its maker to actively look for a solution, along with the entire circle. Community members ask themselves if it is 'good enough for now, and safe enough to try'. If not, then there is an objection, which leads to a search for an acceptable adaptation of the original proposal to gain consent.

There are many different types of decision making: consensus, consent, delegation, majority voting. Link your decision making approach with the context and nature of the decision. It is important in collectives for decision making to be conscious, open and agreed upon. If decision making is made in an ad hoc way, with little attention to process, it risks future conflict.

Ensuring that all voices are heard in decisions that affect everyone, even if not everyone is directly involved in making the decision, will give extra energy and potential to the work, and create a stronger foundation for the community.

Sociocracy or Dynamic Governance allows a CoP to manage itself as an organic whole.

- [Sociocracy30](#)
- [Sociocracy info](#)
- [Sociocracy for all](#)

See also the reference side-by-side [comparison](#) between Holacracy vs Consensus vs Sociocracy.



FINDMORE
ONLINE

Phase 2. Considerations for Transformative CoPs

Key to healthy and transformative group spaces is realising that everyone is different, has their own views and perspectives, lived experiences and their own triggers. We need to expect and prepare to give and receive feedback about our actions or behaviours and have processes to support us to work through any conflict that arises.

THE SOURCE OF THE CONFLICT

At source, our conflicts may be due to how we deal with our diversity, the way we understand or communicate those differences, and how they affect us. We sometimes forget just how different people are: we come from different backgrounds, and have different experiences and needs. Conflict may also come from how we deal with differences in our power or rank, in both our groups and in life.

CONFLICT CAN BE USEFUL

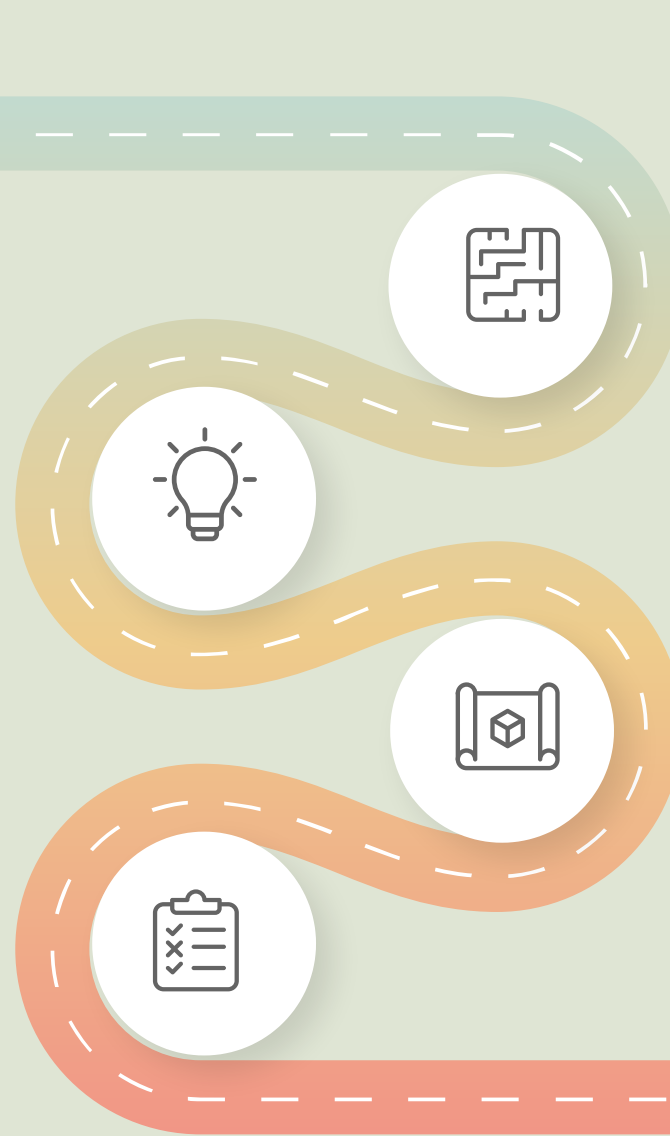
It can challenge our outdated or limited view of ways of working or expand our understanding of the world. It can be creative and help us to develop and adapt to new ways of working, or achieve change to something better.

WHAT IS CONFLICT?

Conflict is usually defined as two or more people having a serious disagreement or argument, typically a protracted one. It can feel difficult to be involved in a conflict, and difficult to see conflict happening. Emotions can be triggered that may interfere with our ability to understand each other, or respond appropriately.

CONFLICT CAN FEEL DIFFICULT

Indeed, for some, it can be so difficult that it compromises people's ability to cope, creating challenging or sometimes unmanageable stress.



Phase 2. Considerations for Blended Learning

PREPARING THE ONLINE SPACE

Technology can support or hinder your ability to connect with and engage your audience. The more familiar and comfortable you are with it, the easier it will be for you to facilitate and build a community online. However, if you and your team (if you have one) are novices - here are some tips:

01

Keep the technology simple

02

Avoid introducing videos, webcams, screen sharing, and breakout rooms all in the first session.

03

Develop your team and CoP's technological skills over time

04

Technologies that use a lot of bandwidth (like video and webcams) are more likely to crash than enhance your participants' experience.

05

Good online facilitation is much more important than lots of fancy technology applications.

Online interaction builds on face to face processes and has a clear complementary purpose especially in the starting phase of the community. Online interaction offers a low cost opportunity to follow up on face-to-face meetings, maintain regular interaction, and to expand participation and membership. The act of sharing what works well and what doesn't can bring opportunities for growth and innovation in the learning environment and empowering educators to try new things.

Collaboration, Co-creation, Meeting Tools

Collaborative documents editors

Collaborative editors are a solid choice when working with a small team and you know how to set up and lead the exercise you're using. These were the only really easy option for teams with accessibility requirements.

Simple sticky note applications

These products are all pretty easy to use for short sessions. They don't have a lot of extra features that might confuse people, and the interactions are all basically point-n-click. But for any team trying to brainstorm and prioritise ideas at scale, we'd suggest using a different type of tool.

Retrospective and Design Meeting Tools

For development and design teams collaborating on internal projects, these products provide an excellent combination of simple process support, low cost, and no-fuss customisation. For the non-technical folks or those working with people outside your team, collaborative documents or decision support tools are a better choice.

Dedicated Brainstorming and Decision Support Software

These products give you the benefits of having a trained facilitator armed with packets of sticky-notes on staff. If you can afford it, learning to use a dedicated decision support tool can add a level of richness, engagement and effectiveness to your meetings that you can't achieve any other way. That said, tools in this category aren't right for everyone. Loomio is an open-source online tool that incorporates consent decision making to make it easy for CoPs to make decisions.

Chat/messaging apps

Chat functions are also a great tool for facilitating regular communication in communities of practice. These apps offer teams across the globe the ability to communicate in real-time, removing some collaboration boundaries. CoP members can pose questions and receive answers immediately, without the delay of sending and receiving emails.

Social System Mapping

Social System Mapping is a tool that is useful to understand and engage with the invisible dynamics of human networks and systems, and could be a powerful way to map connections and relationships between members of the CoP.

Knowledge Commons

There are several types of knowledge management software which are free and open source. KIWI lets you access free knowledge – even offline. This is particularly useful where internet access is not available or is too expensive. Content such as (scraped) websites can be converted to .zim files which can be stored and shared, then loaded into the Kiwix software for offline reading.

Documents Editors:

- [Nuclino](#)
- [Cryptpad](#)
- [Etherpad](#)
- [Notion.so](#)

Simple sticky note applications

- [IdeaFlip](#)
- [Lino.it](#)
- [Jamboard](#)

Retrospective & Design Meeting Tools

- [IdeaBoardz](#)
- [Retrium](#)

Dedicated Brainstorming & Decision

- [Miro](#)
- [Mural](#)
- [PowerNoodle](#)
- [Meeting-Sphere](#)
- [Loomio](#)

Chat/messaging apps

- [Signal](#)
- [Telegram](#)
- [Skype](#)

Social System Mapping

- [sumApp](#)
- [Kumu](#)

Knowledge Commons

- [Freeplane](#)
- [OpenKM](#)
- [Wikipedia](#) - [MediaWiki](#) | [DocuWiki](#) | [TikiWiki](#)
- [Kiwix](#)

An [extensive list](#) of tools for virtual teams to help you work better remotely.



FIND MORE
ONLINE

LEARN MORE

CoPs by Phase

PHASE 3:

Prototype



-
- A background image showing hands interacting with a tablet displaying various colorful circular icons (lightbulb, gear, pencil, etc.).
- How will care of the community be organised and shared between members?
 - What short-term pilot goals will help establish the community as a viable and valuable entity?
 - What community-oriented technologies will be used to support the pilot community's social structures and core activities?
 - What sort of branding, images and metaphors can help project its purpose and values?
 - What is the tone of interactions and activities that facilitators want to model?
 - How will community identity be formed and shared?
 - How will success be measured and communicated to the broader stakeholder groups?

3.1 Designing your pilot

The community will need to be 'fed' with content and a few events and activities will need to be facilitated which are designed to short-term value added goals (learning, encouraging collaboration etc). Decide which assumptions and activities to test during the pilot and which indicators to track during the pilot. Decide who will be responsible for tracking the indicators that you set and how long the pilot will go on for. Who will be responsible for looking at the data and deciding what changes to make? During this phase a group can test the technology that has been chosen to support specific activities.

- Does it work the way we intended it to?
- Are there any needs that we have not considered accommodating for?
- What level of support do people need to use it?
- What type of questions are asked and how can the answers be built into the onboarding process?

3.2 Selecting who will be part of the pilot

Who is involved in testing assumptions, activities and technologies is a critical consideration. If the testing group all have similar levels of understanding of the background to the CoP, similar backgrounds (e.g. professions), similar physical needs, and social and cultural backgrounds then they are unlikely to pick up how different needs and values can be integrated into the CoP design.

3.3 Making changes to the CoP

Taking all of the data gathered, you can now refine the strategy and the processes. It is worthwhile reporting findings back to the test group, and to other key stakeholders to check that they are in agreement with the proposed changes. This also starts to create a healthy culture of observing, listening, being open to change and being adaptable to feedback.

Pilot the community with a select group of key stakeholders to gain commitment, test assumptions, refine the strategy, and establish a success story.

Phase 3. Considerations for Transformative CoPs

Many issues which arise in your CoP can be identified and learnt from during your pilot phase so it is really important not to skip this phase.

CRITICAL AWARENESS

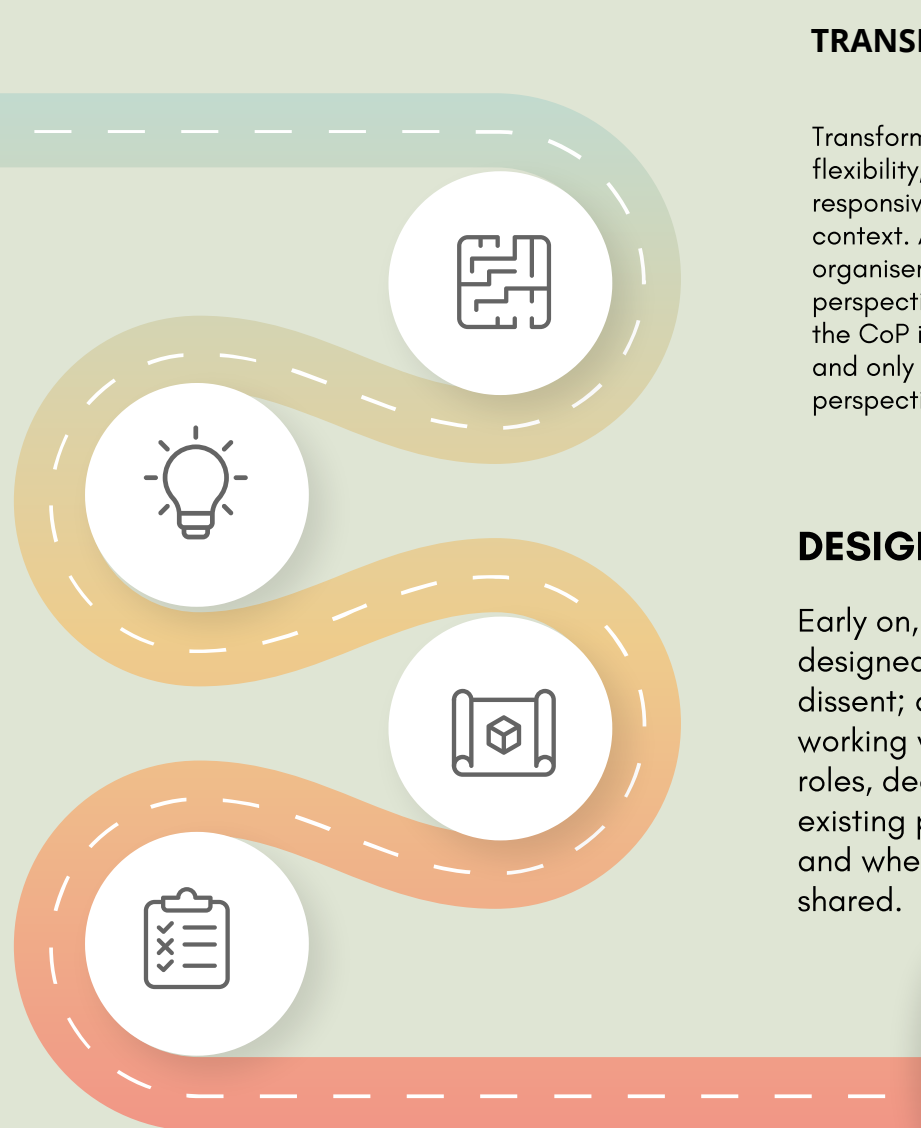
A critical awareness is that as organisers, we can have a limited perspective and need to make sure that the CoP is only meeting limited needs, and only built to accommodate perspectives similar to ours.

TRANSFORMATIVE PRACTICE

Transformative practice encourages flexibility, adaptability and responsiveness to needs and to the context. A critical awareness is that as organisers, we can have a limited perspective and need to make sure that the CoP is only meeting limited needs, and only built to accommodate perspectives similar to ours.

DESIGN

Early on, processes need to be designed for: dealing with healthy dissent; creating feedback channels; working with conflict; and clarifying roles, decision making, analysis of the existing power dynamics and how and where power will be held and shared.



Phase 3. Considerations for Blended Learning

One of the most useful aspects to incorporating a digital aspect to your CoP is that the feedback loop is incredibly fast. You can very quickly know how many and in what ways your first CoP members are using the digital learning environment that you have designed in the previous phase.

01

Where the prototype is working you need not make changes for the Launch phase.

02

Where there are areas which have seen little engagement from the first CoP members you may need to make changes.

03

Look at any analytics data you get from any of the tools you've used, in order to find out the engagement levels.

04

Find out what is working and what could be improved at this stage by asking a sample of the CoP prototype members about their experiences.

05

Check back to the safeguarding measures and consequence scanning actions that you put into place in the previous phase.

Where there is no analytics data then observational methods will work equally well, such as how many members are interacting in any asynchronous discussion spaces, contributing to shared documents or attendance to group calls.

CoPs by Phase

PHASE 4:

Launch



- Why should someone join the community? What are the benefits?
- How do new members learn about the community? What are the community's **norms for behaviour**? How do new members **become** oriented to the community environment?
- Based on insights from the pilot, what kinds of community activities will generate energy and engagement and support the emergence of community "presence" (activities, communication, interaction, learning, knowledge sharing, collaboration)? What will the community's "rhythm" be?
- Based on insights from the pilot, how will roles and community social structures be defined and supported over time? How will success be measured?
- How will the community be sustained over time, how will the finances work?

4.1 Promoting the CoP

- **Develop a 'charter' for your CoP**

Benefits might include : opportunities to share knowledge, experience and learning with others in their field; extending their networks; and getting support, advice and feedback.

- **Inviting people**

Look for members beyond 'the usual suspects', including those with different perspectives, those who are under-represented in the initial group that has formed and those who have a passion for the domain of interest.

4.2 Onboarding

Onboarding is the process of ensuring new members have the knowledge, skills, and awareness to become committed, effective members of the CoP. A good onboarding process welcomes new members and then orientates them to the CoP.

4.3 Facilitating Meetings

Encouraging and supporting the rotation of facilitation ensures a broader spectrum of skills and expertise are shared and allows for a variation in leadership styles and values to be expressed.

Many CoPs never grow beyond a network of colleagues because they fail to attract enough participants.

Oppression is compounded by technology

If you end up tracking participation, you will likely see dynamics of oppression play out. Marginalized groups and those with oppressed identities often tend to participate less frequently. This can become compounded by technology in three ways:

- Oppression hammers people's confidence. As a result, folks' confidence in navigating a novel online space may be challenging. The risk of shaming and exposing ignorance may be much higher.
- People with less resources have less access to high end tech and a dedicated space to work from. Instead of working in front of a large computer with a headset, they might be perched on an outside stoop on their phone as traffic and neighbors pass by, making tasks like adding to wikis or monitoring slack very hard.
- People in money-poor areas have largely been abandoned by internet providers. That means people may have inferior internet access. Without high-end high-speed internet, people's connection may be spotty at best. We're both in poor small-town/rural areas, for example, and have faced the daunting challenge of trying to get stable connections. None of these issues can be fully alleviated without a change in systems bigger than us. So if you're annoyed about it, do join social justice movements for change.

As a facilitator, you have the power to make this situation worse or better:

- Don't always pick the quickest response.
- Make sure all people — no matter their tech — can participate fully.
- Set people up for success.
- Think carefully about who can access the technology...
- Offer the space to support people.
- Connect the content to people's current lived experiences
- Help make the underlying systems better.
- Have people sign petitions asking internet agencies to extend to rural communities;
- Encourage people to participate in upcoming online climate strikes to support a healthy environment;
- Invite the group to support social movements.

Extract adapted from Leading Groups Online by Jeanne Rewa and Daniel Hunter, 2021

LEARN MORE

There are great resources on the Training for Change site including:

Leading Groups Online
a down-and-dirty guide to leading online courses, meetings, trainings, and events during the coronavirus pandemic.

Facilitating hybrid groups online.

Facilitating zoom meetings.



FACILITATION
TOOLS

Phase 4. Considerations for Transformative CoPs

Having a defined audience or 'community' is one of the three core elements of a CoP along with the domain and the process. This defined audience consists of the main group of people who will make key decisions and shape the direction, process and culture of the CoP - in other words the DNA of the community.

NAMES

When opening the space it can be helpful to ask people to share which pronouns they would like used, or to add them to their screen name.

LANGUAGE BARRIERS

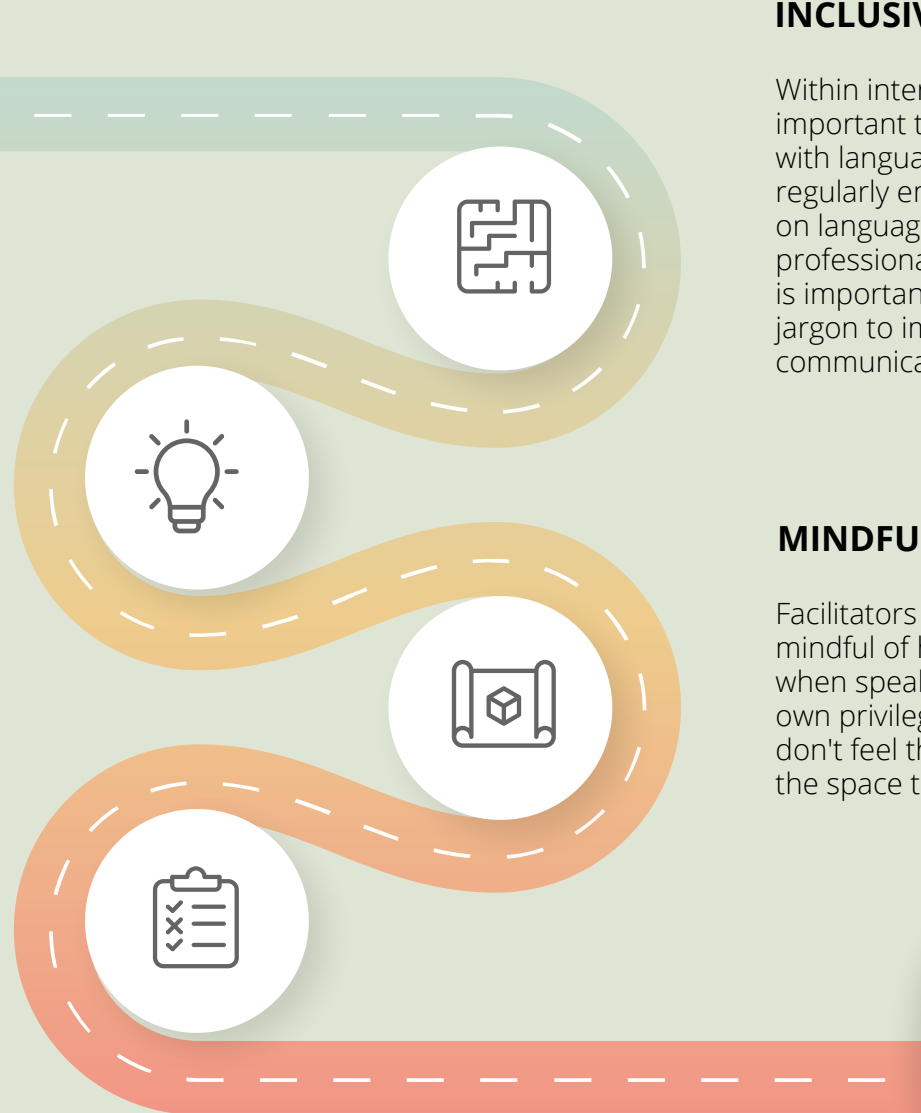
Planning budget for interpretation and translation (e.g. for disseminating results and running workshops) is essential to overcome language barriers. The circulation of detailed written minutes for comments helps those with less distinct verbal skills to catch up with the outcomes of activities.

INCLUSIVE LANGUAGE

Within international communities, it is important to be aware of and deal with language barriers and to regularly employ tools that do not rely on language proficiency. Within professionally-mixed communities, it is important to prevent the use of jargon to impede effective communication.

MINDFULNESS

Facilitators should ask people to be mindful of how much space people take when speaking, and to understand their own privilege to make sure those who don't feel they can easily speak up have the space to do so.



Phase 4. Considerations for Blended Learning

The launch phase of the CoP allows you to implement all that was learnt in the prototype to hopefully improve the tech design of the CoP.

01

Gather insights from the members and ethical consequences and implement changes as a result of them.

02

Be prepared to constantly iterate the tech and the ways you are facilitating it where necessary.

03

You all need clarity and connection more than anything else at this stage.

04

Be prepared to invest time post-launch to iron out any teething problems.

05

The wider ethical impact of individual companies behind technology products used.

The Scottish Council for Voluntary Organisations [Digital Tools](#) pages are a fantastic place to look for tried and tested digital tools for social good, organised by function, in the case that you need to try something new.



CoPs by Phase

PHASE 5:

Cultivate

- What are the emerging benefits of the community for members, subgroups, the community as a whole, the community's sponsors, and other key stakeholders?
- What are the ongoing community processes and practices that are contributing to the liveliness and dynamism of the community and are keeping members engaged?
- What are the emerging roles that one could play within the community?
- How do members create their own community identity and presence?
- What are the most important elements of community culture that are emerging that should be recognised and represented in the online environment, as well as in formal policies and procedures?
- What are the emerging technical needs of the community environment to support the evolving purpose, processes, and community culture?
- To what extent is the community serving its intended audience and accomplishing its stated purpose and goals?
- How is the community addressing societal issues and needs local to the CoP or the CoP community members?

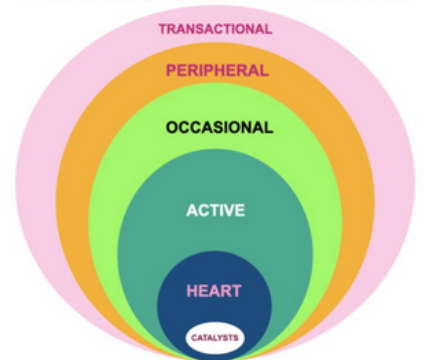
5.1 Levels of engagement

Creating social connections that support and nurture participation in the CoP requires intentional actions to build and nurture relationships. Community is about people and their connections to one another. Fostering a strong community can increase collaboration, accelerate problem solving, and lead to greater care, growth, understanding and innovation.

It is helpful to provide opportunities in the community for members to play new roles, experiment with new community activities, and examine new technology features - this will help them shift between levels of engagement.

- **Catalyst and Heart** – The core circle forms the heart of the community that will organise, document, on-board new members and cultivate the community.
- **Active** – These members work closely with the core team to nurture the learning and help shape the definition and direction of the CoP.
- **Occasional** – These members participate when specific topics of interest are addressed or when they have something to contribute.
- **Peripheral** – These members feel a connection to the community but engage on a very limited basis.
- **Transactional** – These members are the least connected to the community and may connect only to access CoP resources or to provide a specific service to the CoP.

Levels of Participation in a Community of Practice



5.2 Creating healthy group dynamics

Communities of practice are formed by groups and, therefore, an understanding of and ability to support healthy group dynamics is critical for a CoP to thrive. Online environments are more impersonal than face-to-face meetings, so welcoming each participant by their full name, either verbally or via chat, and finding more out about people - where they are calling in from, what their pronouns are, how their day is going, what is keeping them busy, acknowledging world events that might be impacting on people, checking in on people's family and so forth can remind us of our wholeness and help build connection, care and compassion for others as we navigate the challenges and celebrate the joys of life.



Centering Connection

A common challenge after a blended CoP has begun to mature is how can even more connection between the members sharing their learning be created. An answer to this is the Human Connection Framework from Deepr and Catalyst.

There are many tools that comprise it, but a good place to start is the researched five conditions for human connection online:

- **Presence** - So that people are engaged and attentive: So much of how we interact is automatic, but automatic behaviours don't foster connection. Maintaining people's attention when there's an opportunity for connection is essential. One way is to explore ways to keep interactions fresh and new.
- **Equality** - So that people experience minimal power imbalance: Building and acknowledging equality creates an even footing for connection. That might mean using inclusive language or weaving reciprocity into the ways we interact with people who use our web tools. In order to achieve this, we must also acknowledge differences between us.
- **Accountability** - So that people feel invested in our relationship: Connection is a two-way street. We should design our services so that there is much to gain for people in taking care of the relationship between us - we can do that by using real names and photos online, or building in two-way feedback into our processes.
- **Autonomy** - So that people have agency and choice: We must engage people to think, decide and act for themselves in terms of 'what' we do together and 'how' we do it. A way to achieve this is to hand over responsibility of an aspect of the service to members of your community.
- **Whole self** - So that people can be safe in fully expressing who they are: The more we're able to bring our vulnerable whole selves to digital interactions (as both provider and receiver), the more likely we are to build trust, then connection, then relational wellbeing.

LEARN MORE

These ideas come mostly from Time to Think by Nancy Klein – as well as from a host of organisations that practice mindfulness as part of their culture. Care needs to be taken to choose approaches that fit the group & context.

Appreciation, celebration, laughter:

We are prone to focus on the negative. Negatives can release stress hormones in our bodies which cloud our thinking and affect our decision making. Building in moments for connection can get lost in our time/resource scarce & action biased cultures.

Connection, trust building and the whole person:

We often attend meetings only showing part of ourselves, hiding other parts, or feeling that some parts of us are accepted and others not. Working towards people being able to show up as their whole selves.

Legitimise and share feelings:

Allow people to share whatever is true for them without their feelings needing to be justified.

Assumption checking:

We all make assumptions and base our decisions on them. Checking in on our assumptions can help us avoid misunderstandings and make better collective decisions.

Acceptance, challenging perfectionism & unwillingness to make or own mistakes:

It is easy to judge ourselves against high standards and to find it difficult to own our flaws, faults, mistakes and set-backs



MINDFUL
MEETINGS

Phase 5. Considerations for Transformative CoPs

One important concept to become aware of and apply to one's CoP is that of mainstreams and margins.

The mainstream, though not necessarily the majority, is the part of the group that sets the tone, communication-style and way of working. It is usually done unconsciously. The margins might express other behaviours, but if it doesn't become the new norm of the group, they remain in the periphery.

Every group, team and organisation marginalises certain behaviours or characteristics. Sometimes it's more obvious what or who is pushed to the edges, and at other times you will need to observe closely to become aware of it. or the whole group to thrive, these dynamics need to be discussed and negotiated. Importantly, change is generally instigated by the margins, who usually have more awareness of the power dynamics within the group. Diagram X presents some of the ways to spot whether people are in the mainstream or margins.

MAINSTREAM

- talking on behalf of the group, e.g. "of course we all think...", "everyone knows that..."
- not noticing that other people have different experiences, beliefs or expressions on their faces
- staying in their comfort zone and/or requiring 'safety' in the group before engaging
- reacting to 'margins' feedback or naming dynamics as personal attacks
- not taking what is said on board
- engaged with life of group
- sense of freedom as they set the group's norms

MARGINS

- talking together on the edge of meetings and events
- speaking up but not being taken seriously or emulated
- having a clearer sense of the group dynamics at play
- occasionally seeking 'revenge'
- disengagement with the life of the group and not taking action
- taking on roles that are undervalued or not seen
- saying things others say are deemed irrelevant or off-topic
- leaving part of their identity 'at the door'
- sense of freedom as the group does not depend on them

Phase 5. Considerations for Blended Learning

Screen time and overload. Your audience is likely to be busy and wanting less screen time!

01

Be mindful of the participant's cognitive surplus and attention economy.

02

Figure out the right balance between normally occurring participation inequality and collaborative overload.

03

Attention economy is about managing individuals' attention as a limited resource on a daily basis.

04

Remember the rule of thumb related to participation in an internet community.

05

90% of users are lurkers who never contribute, 9% of users contribute a little, and 1% of users account for almost all the action.

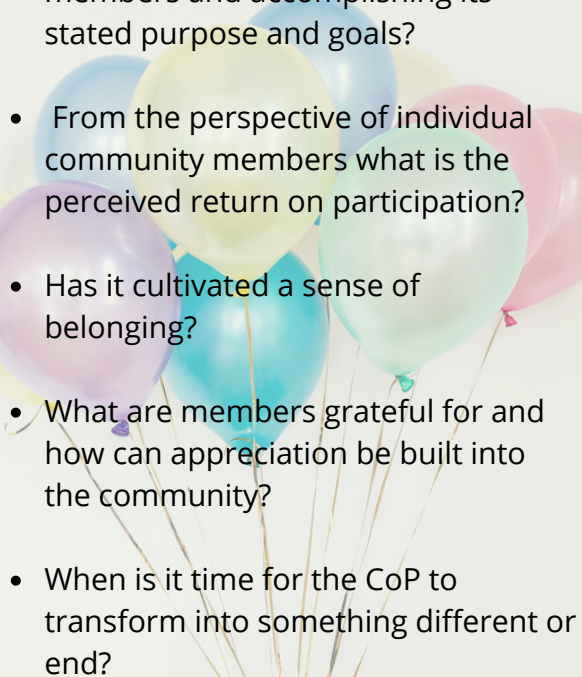
When a collaborator spends so much time engaging with colleagues and responding to their requests that they have little time for their own work we talk about collaborative overload.

CoPs by Phase

PHASE 6:

Reflect, Celebrate & Transform



- 
- To what extent is the CoP serving its members and accomplishing its stated purpose and goals?
 - From the perspective of individual community members what is the perceived return on participation?
 - Has it cultivated a sense of belonging?
 - What are members grateful for and how can appreciation be built into the community?
 - When is it time for the CoP to transform into something different or end?

6.1 Reflection, evaluation and learning

CoPs are living systems which grow and evolve in different ways. They grow organically - through different people connecting with each other, sparking ideas and conversations - and also clashing or conflicting with each other. They grow strategically through being shaped, influenced, expanded and limited by the core team. They also get transformed by external factors such as changes to the financial and time resources that are made available (by the hosts, and the participants); advancements in technology; and through shifts in discourse and the social, political, environmental and economic context.

6.2 Appreciation /cultivating care

Building appreciation and gratitude into our CoPs helps to shift our culture of individualisation and disconnectedness and instead remind ourselves of our interconnectedness, our common struggles and our wholeness. Research shows that we are much more likely to pay attention to the things that go wrong or feedback that we perceive to be negative when we balance this by sharing a greater degree of feedback and acknowledgement of things that we are grateful for and appreciate.

6.3 Closing a Community of Practice

Every CoP has its own life cycle, establishing and maintaining one is difficult but recognising when you're done and moving on can be even more difficult. There could be many different reasons to close, merge or diversify into several other CoPs. It may be that the interests or priorities of the members have changed, or the focus of the CoP is no longer relevant. It might be that funding has been lost, or key individuals have moved on. Alternatively, the CoP may have grown too large and it might make more sense for smaller CoPs to form.

Cultivate and assess the knowledge and “products” created by the community to inform new strategies, goals, activities, roles, technologies, and business models for the future.

What to evaluate?

One approach is to explore what is supporting and what is hindering members to:

- Participate as much as they want to
- Feel connected and identified with the CoP
- Share (resources, learning, skills, experience)
- Learn from each other
- Challenge/critique (views expressed, materials shared (or not) and the CoP set up itself)
- Collaborate and co-create
- Take on, rotate and fulfil roles to support the CoP
- Promote the CoP to others

CoPs which aim to foster transformation need to go further in their inquiry and consider whether the CoP is unintentionally replicating aspects of business as usual which need to be shifted to move to transition to a more sustainable and just future. The following areas of inquiry will help the CoP to gain insight into where and how this is happening and open space for debate on how these dynamics can be shifted:

- Leadership: Is leadership diverse with the presence of marginalised subgroups in highly visible leadership positions?
- Spaces: Are there specific caucuses or independent organisations of marginalised subgroups within the CoP?
- Discourse: Do discourses in the CoP validate the experiences and perspectives of those from marginalised identities?
- Decision-making mechanism: Are key decisions made through discussion or deliberation? Are they relatively accessible? Who takes part in decision-making? Are there spaces for marginalised groups to self-organise?
- Are there regular opportunities for criticism and dissent of CoP decisions by marginalised groups (and others)?
- Group agreements: What happens when participants do not act accordingly to preordained rules - are they ejected or is there space to work through dissent?
- Are the values and principles of engagement of the CoP publicly known and discussed?
- Harm reduction: What happens when harm takes place? Are there accountability tools, processes and procedures for raising concern and addressing them?

LEARN MORE

Some tools to support review/evaluation processes include:

- [Appreciative interviews](#)
- [TRIZ](#) (stopping counter productive activities and behaviours to make space for innovation)
- [Generative Relationships](#)
- [What, So what, Now What](#)
- The SCALE 3D tool

Community of Practice Maturity Model
Self-Assessment Checklist



USEFUL TOOLS

Toolkit

LEARNING PATHWAYS AND TOOLS



*“In theory there is no difference between theory
and practice.
In practice there is.”*

MARCIA CONNER

*What is the Hosting
Transformation Toolkit?*

**Introduction to our
Toolkit**

**Why yet another
toolkit?**

*What is different about
this toolkit from others*

*Who will find this Toolbox
useful?*

Target Group

**What is this
toolkit
about?**

Search methods

*Learning
pathways/methodologies,
the long distance tools.*

**How to use this
Toolkit**

**Who is behind the
Toolkit**

*By whom and how the
toolbkit is developed*

Toolkit

A toolkit of shared tools and methods has been established by the BLAST project, to be used in conjunction with the Community of Practice Guide and the Competency Framework.

A toolkit of shared tools and methods has been established by the BLAST project, to be used in conjunction with this guide. In the context of the socio-ecological transition we focus on transformative communities of practice in blended learning environment

What is the Hosting Transformation Toolkit?

The hosting transformation toolkit is a growing collection of tools that help to make the socio-ecological transition more likely and joyful.

Our toolkit consists of

Basic Tools

Quickly grasp what is helpful to know about things we do quite often in our facilitation practice

Methods

Get all the important info about a specific method in one place, so you can use it right away.

Pathways

Design the curriculum of your course along the phases of a multiple times tested learning methodology.

Articles

Dive deep into one of the questions we ask ourselves as facilitator over and over again.

Its development is funded by a range of Erasmus+ projects, the BLAST project is one of them with its focus on blended transformative learning. In the frame of this project the toolbox has undergone some significant transformation itself in terms of look and feel and usability. Other foci of the tools so far are innovation, empowerment and more online transformative learning tools. People skills and climate coaching tools are in the lineup.

Why yet another toolkit?

This toolkit is only one of many. If you take the time to meander through the vast collection of tools in the Toolkit you will be rewarded with multiple inspirations. A lot of the toolboxes are well designed and some have (at this moment) a lot more entries than this one. But as a facilitator or host, you might not be in need of inspiration right now. A well described method that suits your specific needs is all you ask for. In that case start here for two reasons.

We go for quality over quantity. Each method is well described by an experienced facilitator. Most of them include a detailed step by step guide, many have downloadable materials. We could not find another toolbox that describes each tool in such detail.

Our filtering options are simply the best. With convenient sliders and categories you can easily narrow down your search to your needs. This is already a big time saver now but will play out its full potential when we have hundreds of entries in the near future.

Examples from our Toolkit:

- [Backcasting](#)
- [Carousel](#)
- [Dare to Ask](#)
- [Dyade](#)
- [Life Wheel](#)
- [Metaphoric Cards](#)
- [Sensing Journeys](#)
- [System map](#)
- [Upside Down Technique](#)



USEFUL TOOLS



Who will find this Toolbox useful?

The tools are especially useful for hosts, teachers, team leaders with at least some facilitation experience. But even as a newbie you can find tools to start with.

And if you have a totally different background and wonder how these strange people manage to do strange things like “holding the space” and why it is a good idea to hire them, you're most welcome to look around, too.

By whom and how the toolbox is developed?

The toolkit is developed by the Hosting Transformation Community of Practice. Even though the toolbox is growing fast, it will never be any close to complete. We orchestrate our efforts in design sprints and on a Miro Board, but the final selection of tools that are entered is made by the authors. We are deliberately encouraging cherry picking. All authors are experienced facilitators and they only enter methods they are passionate about and they have used multiple times.

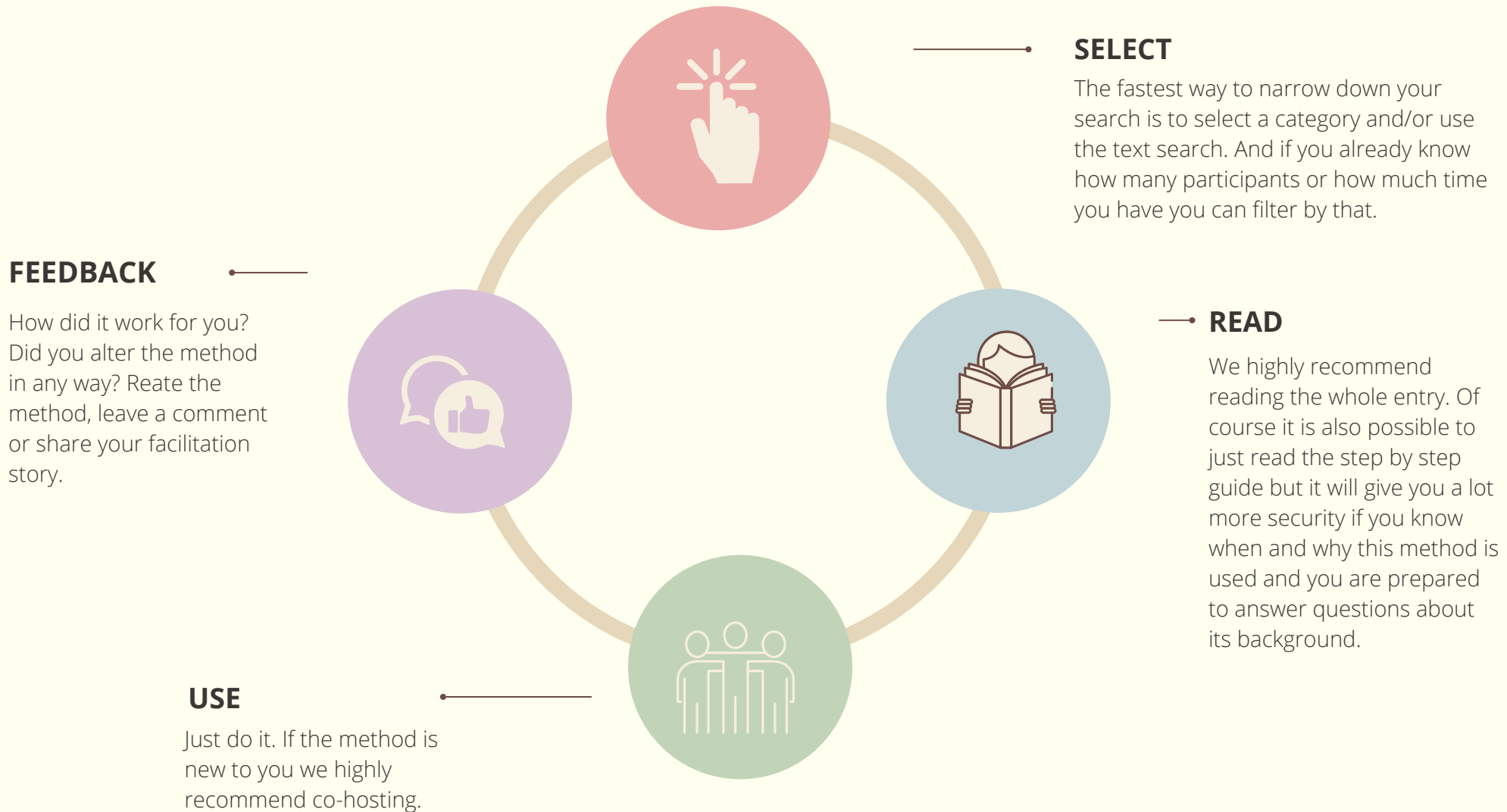
But we are also interested in your needs. If you miss a specific method, put its name on the wish-list. And if you feel qualified to write about it yourself, please go ahead and contact us. We will support you with an expensive template that will guide you through the process, personal SEO coaching, and qualified feedback. It is a perfect way to become part of our great community of practitioners.



LEARN MORE

How to use this toolkit?

Generally it is quite straightforward: Select - read - use - feedback.

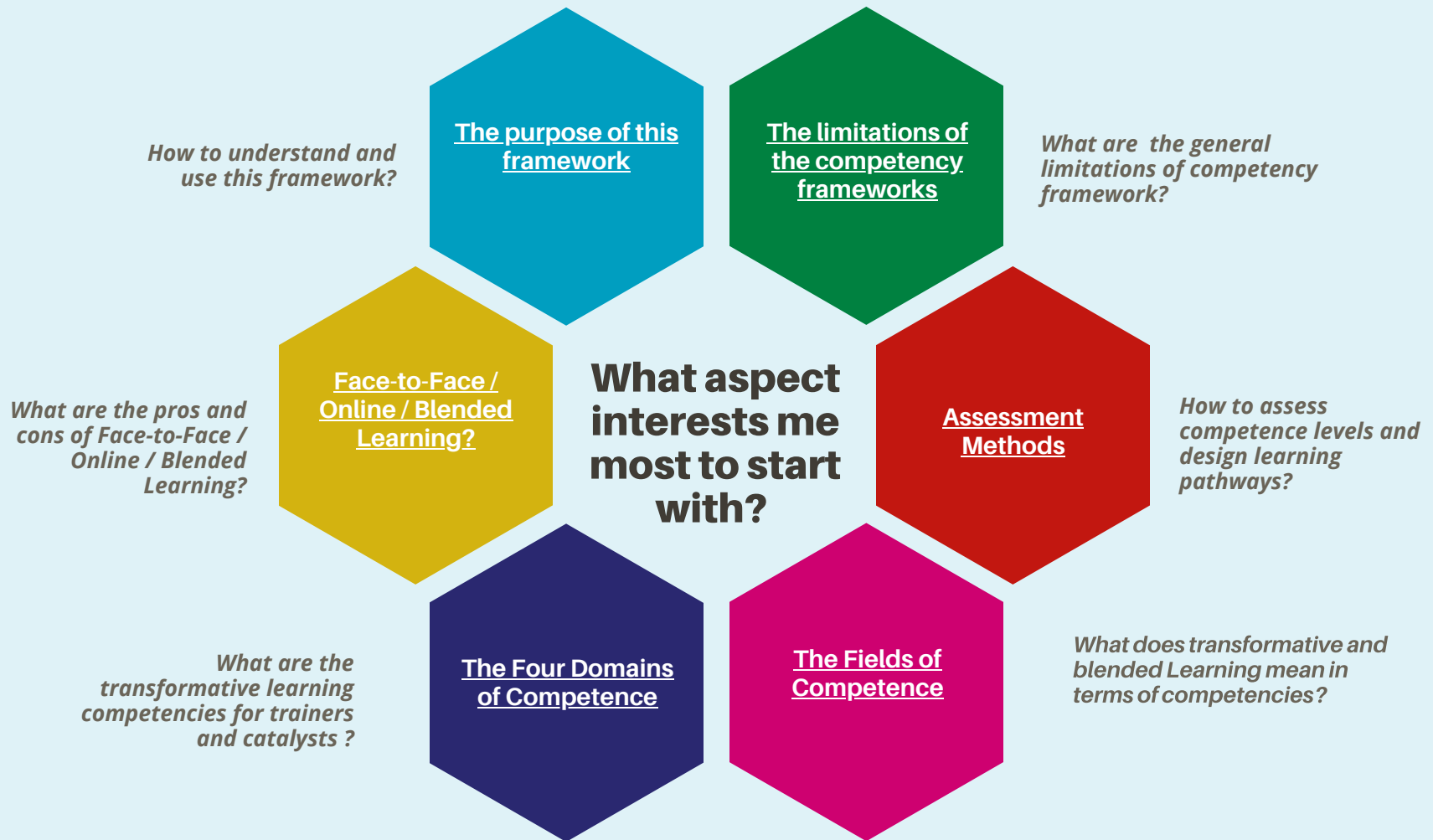


Competency Framework

*FOR BLENDED TRANSFORMATIVE
LEARNING
AND THE SOCIO-ECOLOGICAL
TRANSITION*

"In important transformations of our personal lives and organizational practices, we must learn new forms of activity which are not there yet. They are literally learned as they are being created. There is no competent teacher. Standard learning theories have little to offer if one wants to understand these processes."

YRJÖ ENGSTRÖ



Competency Framework

The framework provides a structure for understanding the sets of competencies that are needed for:

- trainers and catalysts, and teams they are part of
- participants in learning and action, from the individual to the community, including teams (e.g. employees) and groups (e.g. community groups),

The Competency Framework organises these in relation to the following areas:

- Transformative learning competencies
- Blended learning competencies
- Socio-ecological competencies

and realms:

- Intrapersonal (Being) Realm
- Interpersonal (Relating) Realm
- Cognitive (Knowing) Realm
- Action (Doing) Realm

How to understand and use this framework?

The purpose of this framework

The purpose of the framework is to catalyse, scale and accelerate socio-ecological transition. It aims to achieve this by identifying and enriching the beneficial relationships between **three fields of BLAST competence** that are distinct but interconnected. These three fields of competence are:

- **Transformative learning**
- **Blended learning**
- **Socio-ecological transition**

The intention is to understand and explore ways to relate each of the three fields of competence to each other, as well as to identify ways to put them into action and develop them, which in turn will accelerate and deepen our capacities to live the socio-ecological transition. The general goal is to develop a usable framework from which individuals, teams, collectives and communities can put in place and develop the ecology of collective competencies that they need to bring about blended transformative learning for socio-ecological transition. Therefore, we intend to develop, refine, and improve this Framework over time, in both its content and its presentation, in order to improve its usability and impact.

Why Competencies?

Competencies, as a framework of thought, originated in the 1970's as a way to move beyond narrower concepts of skills and knowledge. Hence, competency thinking emerged from the recognition that every job requires a specific set of competencies to do it well.

Importantly, this approach focuses on what a person can learn, rather than what they can do - so has become useful and popular in the training sector. Specific behavioral indicators as well as self-knowledge, motivation, and desire and willingness to demonstrate effective performance in a role can all be understood as types of competencies. Competency-based learning focuses on outcomes as well as the learners' real-world performance, whether that is within a work context for a specific job, or in a role as a trainer or facilitator of community-based activity or learning.

This approach is therefore seen as potentially being of significant value for considering what people need to learn to enhance their capacity to positively live and impact socio-ecological transition, whether they are active as individuals, as part of in a work team, or as trainers or community catalysts.

Whom is this framework for?

This guide is particularly for Trainers and Community Catalysts that are aiming to help initiate, catalyse or strengthen transition processes in communities, within organisations or networks, or at a system level – especially where they will be using both transformative learning methodologies and blended learning methods. This includes adult educators, facilitators, coaches and similar professionals, as well as change-makers, activists and civically engaged citizens interested in transformative adult learning opportunities. The framework is also intended to be useful for other stakeholders, such as funders and policy makers who are seeking to support those that more directly catalyse, expand or accelerate transition processes.

The framework is presented in a format that distinguishes the competences needed for:

- Participants in Learning & Action
- Trainers & Catalysts
- Hosting - Organisations, Venues and Networks

USEFUL
INFORMATION

Why competencies?

This framework identifies the competencies that enable the catalytic effects of blended transformative learning to occur, to generate the kind of learning that is required for activating the social-ecological transition. This is often learning of a kind that:

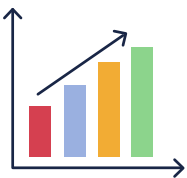
- Involves trying out and creating new practices that are not yet part of any consolidated body of knowledge or accepted professional practice.
- Is learning for an uncertain future (Ron Barnett),
- Is both collaborative and holistic in its approach, with both personal and social dimensions
- Is about shifting paradigms which underlay disruptive system innovations
- Happens often in a context of fuzzy boundaries with contested meaning making
- Involves instantaneous global digital communication.

Whilst identifying these characteristics for the kind of learning we are seeking to catalyse, we also should not be naive or assume that all paradigms shifts, such as shifts toward a 'populist paradigm', are going to have constructive or useful outcomes in the context of socio-ecological transition.

Competence frameworks can be extremely helpful for developing a deeper understanding of both the content that needs learning and appropriate ways in which this can be delivered. In particular, competence frameworks add to the traditional dimensions of knowledge and skills essential dimensions of attitudes, motivations and inclinations that have such a fundamental impact on both the experience and outcomes of learning, and on the application and ripple effects that arise from that learning.

However, competence frameworks are often developed with a stable predictable world in mind. They are not usually developed with our Volatile, Unpredictable, Complex, Ambiguous (VUCA) world in mind, that is characteristic for communities and cultures undergoing societal transitions.

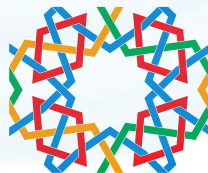
VUCA



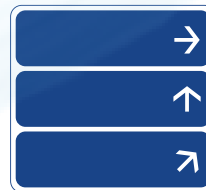
Volatility



Uncertainty



Complexity



Ambiguity

The competencies and learning approaches that are helpful and productive for surfing the waves of complexity, coping with wicked problems, and creating systemic interventions in multi-stakeholder networks with fuzzy and shifting boundaries, differ substantially from traditional classroom learning of existing formal knowledge that can be conveyed repeatedly by a well-trained teacher.

Therefore, in particular the framework emphasises the inner and social competencies that are essential for meaningful transition learning and action.

Again, to avoid naive assumptions, awareness is also needed that individual and social responses to a VUCA world can manifest competences that seek to engage with the VUCA world in highly reactionary ways e.g. social media skills that are used to promote climate change denial narratives. Therefore a framework for socio-ecological transition competences needs to be explicit about the difference between 'reactive or reactionary' competences and 'responsive' competences, with a clear focus on responsive ones.

COMPETENCIES
VUCA

In addition to these types of awareness, this framework aims to:

Rectify the historical rejection of 'inner' realm from sustainability education in terms of acknowledging the importance of people's mindsets, worldviews, beliefs, values and emotions - for example, this supports the shift from learning about sustainability, to learning that actively generates sustainability.

Recognise the stress inducing aspect of learning around socio-ecological sustainability i.e. waking up to the inherent connection between our culture's devastating environmental impacts and ongoing issues of huge inequalities social justice, human rights and active citizenship

Work with the uncertainty of any individual's responsibility and role in supporting transition.

Recognise the importance of sustainability learning involving and encouraging a cultivation of hope: hope that balances facing up to and realising our part in difficult realities with holding on to a sense of promise (the world as a place of vitality, generosity, striving to flourish) and potential for change - that power structures are not immovable, set in stone and that collectives can affect change.

Address the pressing need to overcome deficits in a) pro-environmental behaviour and b) behaviours relating to social change i.e. closing the gap between vision and values, and action.

Address the vital need to link personal action with collective action, including the need to emphasise the socio-political dimensions of collective action, if we want truly 'transformative learning.

The limitations of competency frameworks

This competency framework is being developed with a recognition that competency frameworks in general may have a number of limitations, and that this particular competency framework has its own limitations.

Limitations of this particular framework

The framework has not been designed by or alongside educators or facilitators from more diverse backgrounds and this was a restriction of the way the project was designed. As such, this framework has been designed by a collective that is exclusively White, with an over-representation of those who in the UK would be categorised as 'middle-class'.

Whilst its refinement and improvement over two or three rounds of iteration has been designed with the intention of consulting educators or facilitators from diverse backgrounds, the starting point will be likely to remain a limitation. It is recognised that a competency framework for the same purpose would look and function differently if it was designed and written by educators, facilitators and catalysts from a diverse range of backgrounds.

The complexity of the material and goals being addressed in comparison with the available resources and the limitations of the competencies and experience of those developing this framework inevitably means it is imperfect and has limitations.

The intention is that through engagement with and feedback from a much broader and more diverse audience the wisdom of the crowd can become active in helping this framework to become as usable and useful as possible, both in the short and long term, through various iterations, associated tools and spin-off activities.

General limitations of competency framework

- Not used widely
- Not designed with a specific use in mind
- Not useful for the needs of their potential audience
- Not user friendly for their intended purpose
 - e.g. too long/short, not easy to navigate, too long to get to the point
 - e.g. do we want people to be able to self assess? Have we provided a scorecard for that?
 - e.g. are the categories sufficiently well described to be able to self-assess?
- Who they have been designed by and the bias that this might lead to in terms of:
 - what is unconscious/conscious;
 - over/under valued
- Who they have been designed for and the bias that this might lead to
 - Language used and how accessible it is depending on:
 - whether English is your first language or second
 - Language used that is academic/elitist/inaccessible
 - Language that is overly conceptual and insufficiently practical
 - Language used that is jargon/specialist
- Use of sign language or other accessibility considerations not being included
- Only appealing to read-write learners - no examples, case studies/stories, quotes, lacking diagrams and imagery - a lack of visual appeal

USEFUL
INFORMATION

What to use this framework for?

This competency framework is specifically designed to help individuals, teams and organisations to:

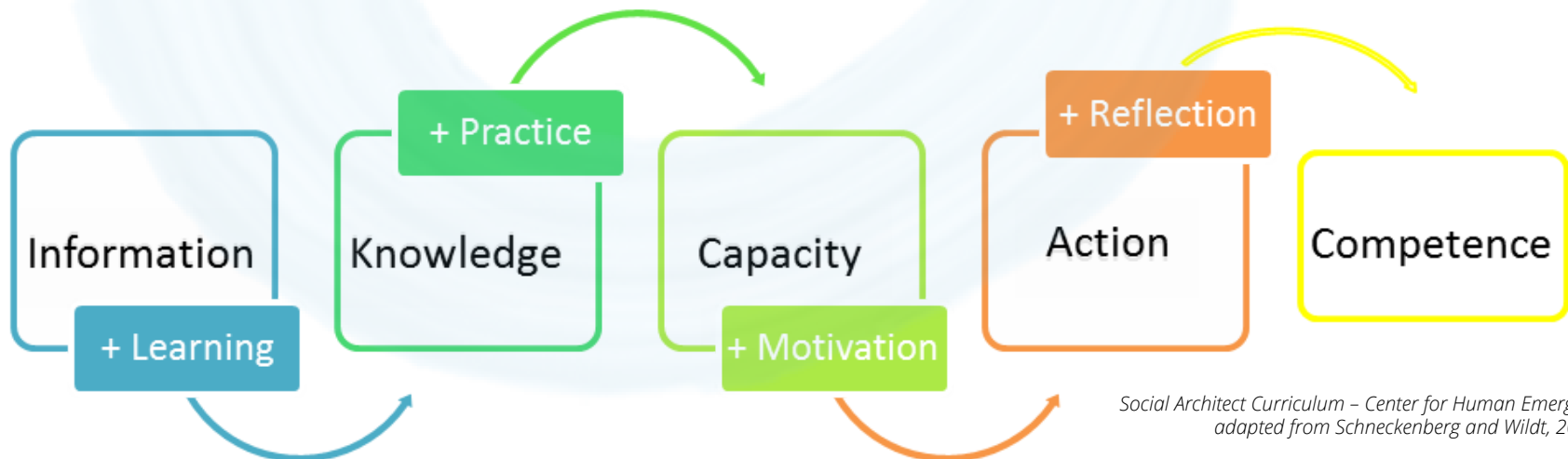
Assess Competencies:

- Self-assess their own levels and qualities of existing competencies
- Assess the levels and qualities of existing competencies amongst learners, activists, groups or communities they are part of or working with

Develop & Enhance Competencies:

- Learning pathways: to raise and refine their competencies over time, individually and collectively by identifying any key gaps and priorities where i) their individual or team competencies or ii) those of their own target audiences, can be developed, enriched or added to in order to help catalyse, expand or deepen socio-ecological transition activity.
- Program development: designing, implementing and refining and resourcing:
 - Training programs for Trainers and Catalysts
 - Change-making action-learning programs for individuals, groups and communities involved in advancing socio-ecological transition activities, which would be expected to be project based / experiential programs.

To develop, raise or refine competence over time requires an inherently transformative process (an action-learning journey), which incorporates a combination of elements, as illustrated below:



Social Architect Curriculum – Center for Human Emergence, D.A.CH – adapted from Schneckenberg and Wildt, 2006)

Competence levels Assessment

Assessment Methods

There are of course a variety of different existing models for assessing competencies. We have selected three of them. However, if trainers and catalysts are familiar with any specific assessment model that appears to them to be appropriate for addressing the complexities of blended, transformative, transition learning it may be best for them to use that assessment model, at least initially, as it will give them a solid foundation in this work. If they need a framework to apply, the following option is offered.

First option: Dreyfus & Dreyfus - Skill acquisition model

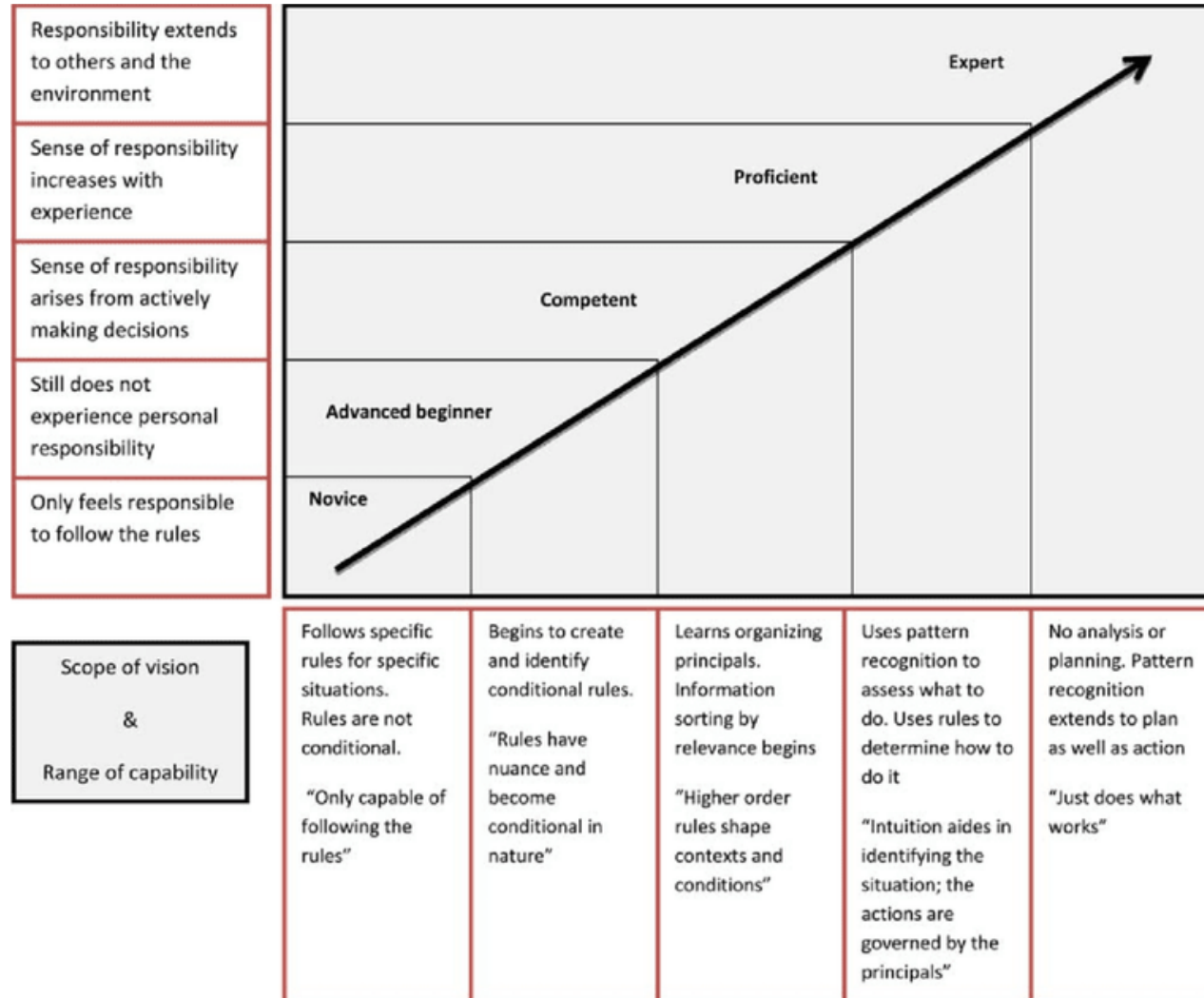
This model gives a more detailed description of what it means to be at different levels and offers criteria on which to rate a learner or rate a trainer (or for them to self assess themselves).

The Dreyfus model is recommended as a relatively simple methodology. As well offering a relatively simple system for assessing individual competence levels, in a general sense, the Dreyfus model can be applied / adapted to address the *collective competences* that exist or are needed across a team, group, community or movement. For example, the scale can be used to map the highest level of competence across a team in each competence area, and the number of people at each competence level.

Stage	Characteristics	Needs	Knowledge Structure	Relevancy Recognition	Context Assessment	Decision-making
Novice	Rigid adherence to taught rules or plans Little situational perception No discretionary judgement	Step by step instructions Supervision First successes	No Context	None	Analytical	Rational
Advanced Beginner	Guidelines for action based on limited attributes or aspects Situational perception still limited All aspects are treated separately and with equal importance	Simple projects A safe environment for failure Lots of repetition	Contextual			
Competent	Sees actions at least partially in terms of longer-term goals Conscious, deliberate planning and execution Creates routines and procedures	Complex but controlled projects Real world exposure	Contextual	Present		
Proficient	Sees situations holistically rather than in terms of aspects Prioritises importance of elements Deviates from normal patterns deliberately Uses maxims for guidance	Unhindered practice and exposure Explore the possibilities	Contextual	Present	Holistic	
Expert	No longer relies on rules, routines or maxims Intuitive grasp of situations based on deep tacit understanding Analytic approaches used only in novel situations Full vision of what is possible with medium	Expand knowledge & experience Push boundaries of field or medium	Contextual	Present	Holistic	Intuitive

Competence levels Assessment

Second option: Scaling & Multiplier Competencies



Assessing Scaling & Multiplier Competencies

Although this option is considered a good model, it does not address the need for scaling and multiplying transformative transition processes and outcomes, which is implicit because of the scale and urgency of the ecological and social issues the framework seeks to address.

The recognition of the need to identify and assess Scaling & Multiplier Competency levels and qualities has been influenced by the 'Introductory to Multiplier' model used by Fein and Molz in the LiFT (Learning for Transition) Course Curriculum, which takes account of how competencies can be spread or *multiplied* once an expert level has been achieved. The model moves from Introductory, to Intermediate, to Advanced, to Expert and finally to Multiplier levels.

However, the limitation of this Fein and Molz model is that Multiplier competencies can themselves be seen as having their own levels from Foundation level to Expert level. For example, simply developing the confidence and the vocabulary to talk about the importance of being engaged in transition activity can be seen as the Foundation level for Multiplier competencies, while the ability to organise, deliver and refine outstanding blended, transformative transition learning programmes would be an Expert level of Multiplier competence.

Therefore, this framework specifically includes Scaling & Multiplier Competencies within the framework so that their fundamental importance is specifically identified and can be addressed within individuals, teams, groups, communities and movements. Hence, learning pathways that develop expertise in Scaling & Multiplier Competencies needs to be addressed directly in learning and action programmes.

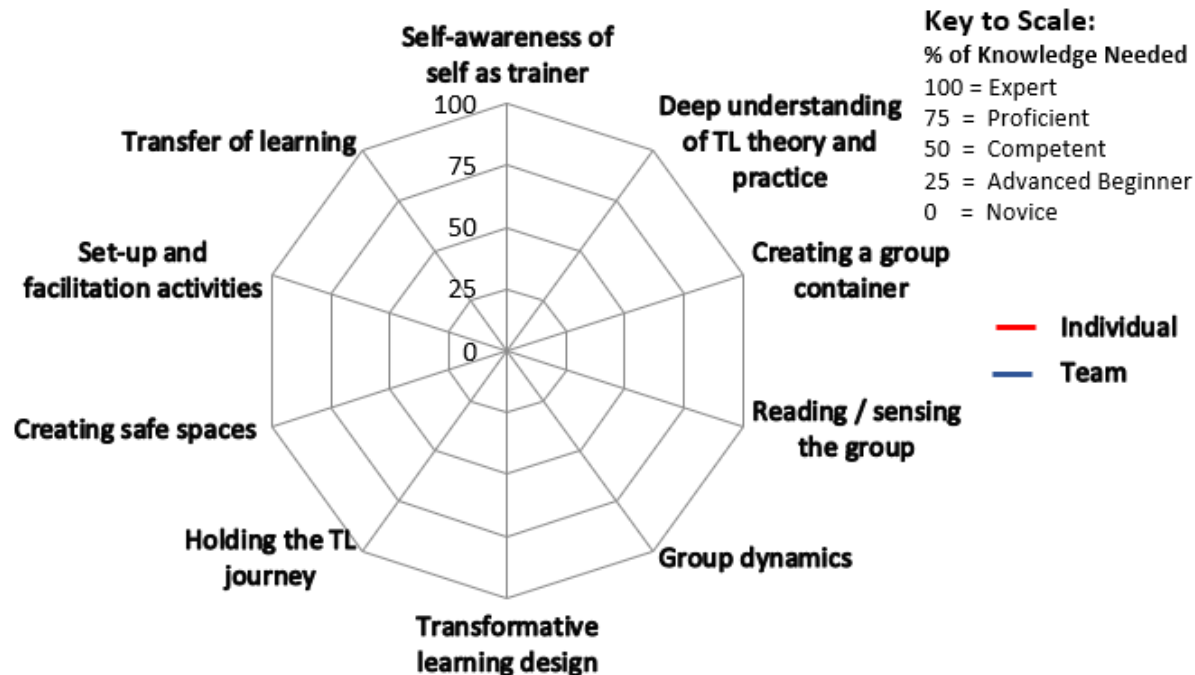
Competence levels Assessment

Third option: Mapping transformative learning competence

The Web chart covers the full set of transformative learning, blended learning and transition competencies both for learners (individuals, teams, communities) and for trainers / catalysts (individuals and teams). The chart system can be used to map current levels of competence in grouped competence areas.

Map Your Transformative Learning Competence – Trainers & Catalysts

Assess your individual and team competence in each of these 10 key areas using the 0 (Novice) to 100 (Expert) scale indicated here:



The BLAST Competency Framework covers ways to assess and map competency levels, and provides a full set of competency maps similar to that illustrated here.

Drawing on the BLAST Framework and prior work in the sustainable construction sector, the following offers a way to assess, plan and visualise competencies in a range of transition areas, with the diagram below being specifically focused on one technical sustainability competency area that is generally going to be essential for transition.

Find more in Appendix 1: Assessing and Mapping Transition Competencies in our "Exploration of Transition Competencies."

LEARN MORE

ADDITIONAL
INFORMATION



Developing learning pathways

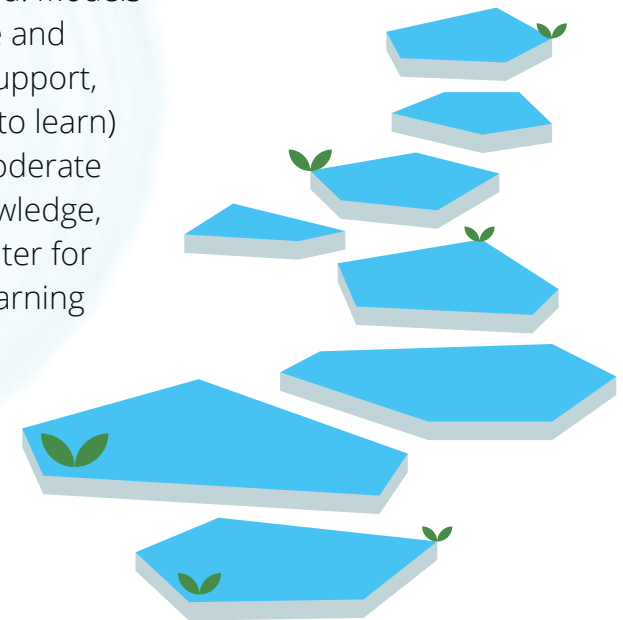
Having carried out a self assessment, peer or management assessment, or some form of 360 degree assessment (where several people assess one individual), decisions need to be made for how to support the learner to develop the competencies that are less well-developed.

A learning pathway is a proposed path of learning (for any knowledge or skill) which takes into account:

- the order/sequence of what to learn and when, which can help to assimilate new information, reduce overwhelm and help shift thinking patterns and behaviours.
- how to address common barriers to learning or applying learning. Learning pathways recognise that learning takes time, persistence and support whilst recognising that learning is not always linear, 'logical' or 'rational' or predictable. Once an assessment has been made, a learning pathway can help indicate what form of learning event/experience (e.g. structured course, coaching, shadowing) is appropriate.

Learning pathways themselves can be designed with assessment frameworks in mind. Models such as Dreyfus and Dreyfus remind educators that competence building takes time and effort as learners move through the levels and often requires the means (i.e. time, support, money), the motive (interest in learning that will encourage them to make the effort to learn) and the opportunity for putting learning into practice. Assessment tools can help moderate educators' expectations about the extent to which one learning activity will shift knowledge, develop skills and affect attitudes and plan for a number of learning activities that cater for the messiness of learning - with people with different starting points, motivations, learning preferences and different contexts.

In the following we present two models for developing learning pathways.



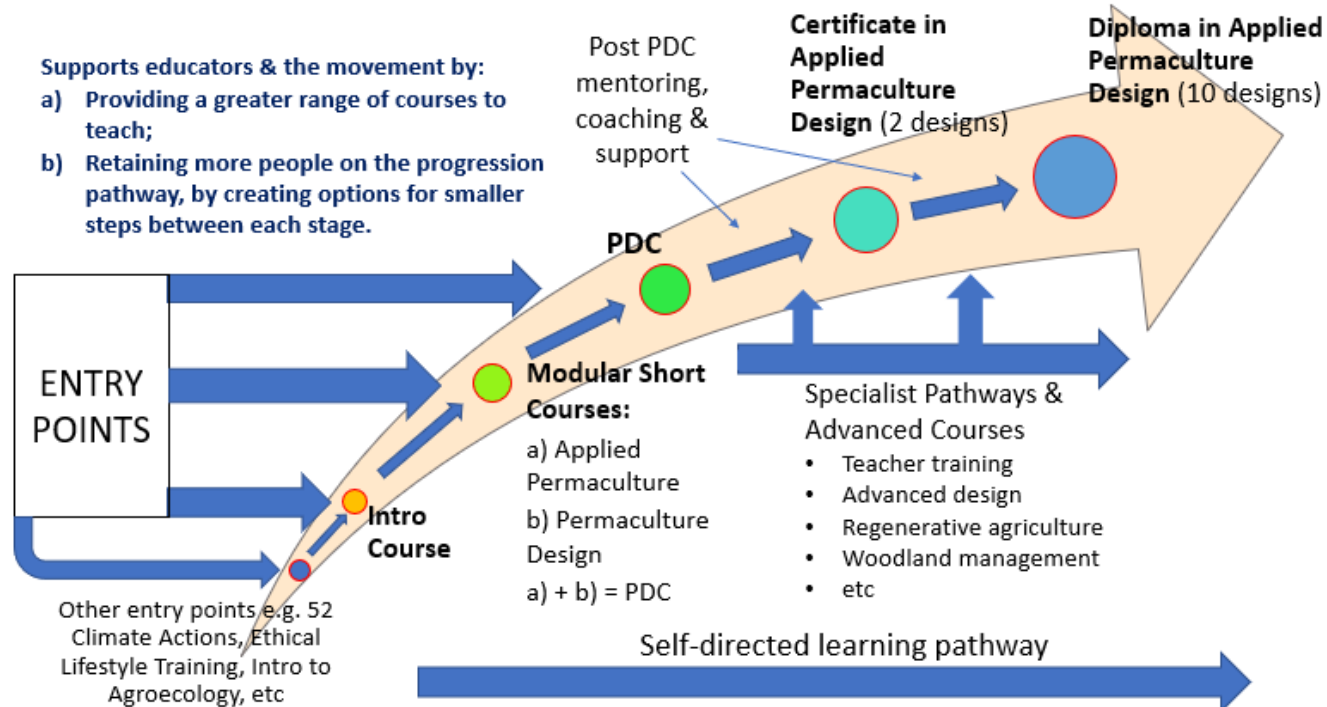
Evolve Permaculture Education Progression Pathway

The diagram below indicates a learning pathway that is being worked on in permaculture education, where new course and programmes are steadily being developed that:

- add new entry points at the introductory level
- help close gaps in the learning journey which are well known as being experienced as a big leap for many learners which prevent or inhibit their progression
- add more choices on branches of the pathway that can be followed.

A characteristic of the pathway is that progression:

- builds the level of action and implemented practice that is linked to the learning
- involves a shift from an emphasis on taught courses toward largely self-directed learning and peer-to-peer support as the pathway progresses.



The Pedagogy, Andragogy, Heutagogy (PAH)

Continuum: Self-Directed and Self-Determined Pathways

The intrinsic qualities and transformative potential of learning pathways are increasingly understood in terms of the type of teaching or learning facilitation that is most evident within the learning journey. In a technical sense this is defined as the Pedagogy, Andragogy, Heutagogy (PAH) continuum - where Pedagogy is teacher-led learning; Andragogy is self-directed learning; and Heutagogy is self-responsible learning.

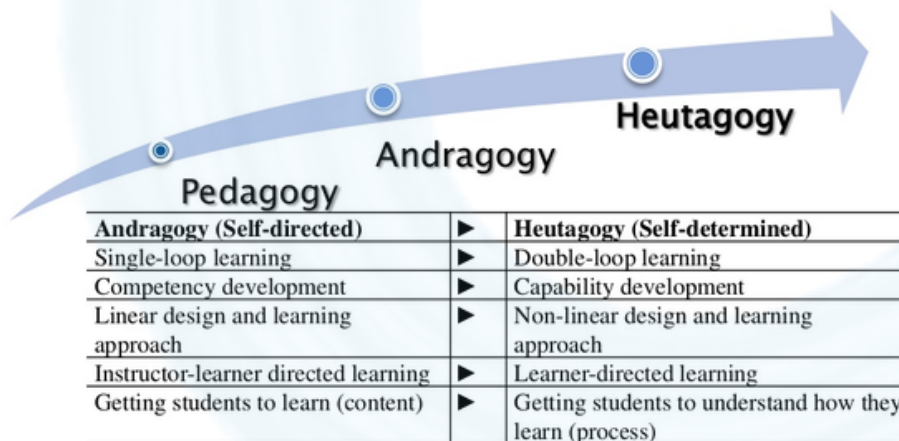
	<u>Pedagogy: Teacher-Led Learning</u>	<u>Andragogy: Self-Directed Learning</u>	<u>Heutagogy: Self-Determined Learning</u>
DEPENDENCE	<ul style="list-style-type: none"> The learner is dependent. The teacher determines what, how, where and when anything is learned 	<ul style="list-style-type: none"> Learners are independent. They strive for autonomy in learning, to arrive at a destination determined by others. They are 'problem solvers' 	<ul style="list-style-type: none"> Learners are 'problem-finders'. They know their destination and become interdependent on those who can help them determine the route
REASONS FOR LEARNING	<ul style="list-style-type: none"> Learners place their trust in the teacher and the efficacy of linear, sequential learning. Learners take little or no responsibility for their learning 	<ul style="list-style-type: none"> Learners seek guidance/mentorship, but aspire to increasing responsibility for the direction of their learning 	<ul style="list-style-type: none"> Learning is not necessarily sequential or linear. Learners accept full responsibility for their learning, welcoming challenge and serendipity
FOCUS ON LEARNING	<ul style="list-style-type: none"> Learning is subject-centred and focussed on prescribed curricula 	<ul style="list-style-type: none"> Learning is goal-driven, focussing on tasks which allow for cross-disciplinary thinking and autonomy 	<ul style="list-style-type: none"> Learners are enquiry driven – they take a long-term view of their learning, seeking further complexity and uncertainty
MOTIVATION FOR LEARNING	<ul style="list-style-type: none"> Motivation derives from external/extrinsic sources, e.g. parents, teachers, sense of competition etc. 	<ul style="list-style-type: none"> Motivation is intrinsic – learners enjoy the boost to self-esteem that comes from successfully completing challenges 	<ul style="list-style-type: none"> Motivation lies in experiencing 'flow' and knowing how to learn. Learners seek out unfamiliar situations and the gaining of 'adaptive competencies'
ROLE OF TEACHER	<ul style="list-style-type: none"> Pedagogue – designs the learning process, suggests and provides materials deemed effective at achieving desired outcomes 	<ul style="list-style-type: none"> Facilitator – sets tasks but encourages diverse routes to solutions. Pursues meta-cognition in learners 	<ul style="list-style-type: none"> Coach – brings together opportunity, context, external relevance and extended complexity. Fosters a culture of collaboration and curiosity

Tabulation created by Jon Andrews

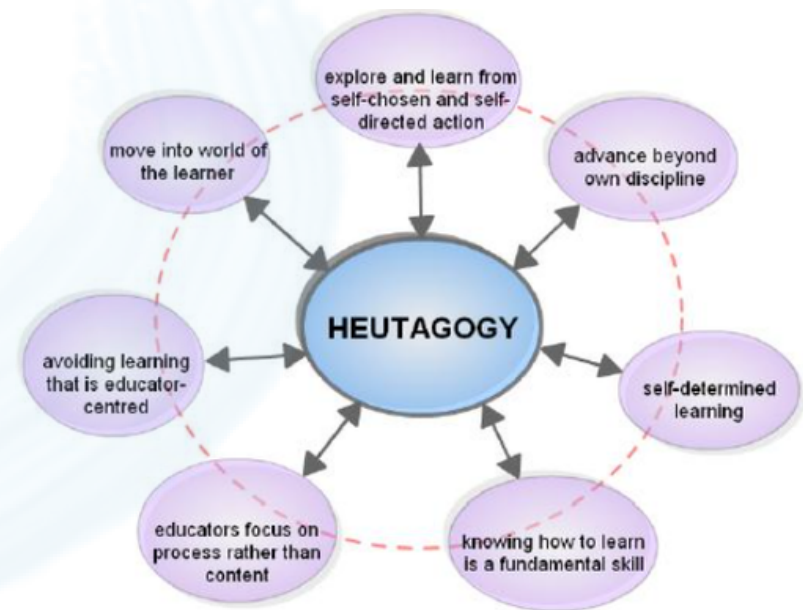
The Pedagogy, Andragogy, Heutagogy

The assumption in transformative learning for the socio-ecological transition is that the underlying character of individual and collective learning experience will be primarily self-directed (Andragogy) and / or self-determined (Heutagogy). Teacher-led learning (Pedagogy) will have its place, particularly at foundation levels and potentially in more technical fields, however the general direction of travel will be that individuals and groups, communities, collectives, networks and movements are defining and creating the regeneratively sustainable and equitable futures that are relevant to their particular context and range of needs - therefore **transformative action-learning journeys for transition are primarily self-directed and self-determined**, both for individual and collective participants in learning, and for the 'trainers', who in this context are much more accurately described as facilitators of, and catalysts, for learning.

A CONTINUUM OF ANDRAGOGY



HEUTAGOGY



PAH Framework for Project-Based Learning for Transition

By considering how a project-based learning (PBL) approach will often contribute to the goals of transformative learning for the socio-ecological transition, it is possible to understand how different styles of learning experience are relevant and appropriate along different stages of individual and collective learning pathways, as indicated below.

Driving Questions

- Pedagogy** – How well can you create the regenerative and equitable future that you envision as being relevant for your context?
- Andragogy** – How can any known visions of regenerative and equitable futures be adapted and modified to your context?
- Heutagogy** – What regenerative and equitable future do you want to create?

Overall Purpose or Goal

- Pedagogy** – To teach basic skills and key skills as a foundation for future projects.
- Andragogy** – To provide some structure so learners can be self-directed.
- Heutagogy** – To establish an environment where learners can determine their own goals, learning paths, processes, and projects as contributions to generating a regenerative and equitable future.

Role of the Educator

- Pedagogy** – To teach, demonstrate, help learners design, plan and do their project correctly.
- Andragogy** – To facilitate, assist learners, mentor.
- Heutagogy** – To coach, mentor, be a sounding board, be a guide very much on the side.

Project Development Process

- Pedagogy** – Use of prescribed kits, templates; step-by-step directions and tutorials.
- Andragogy** – Use of some templates; learners add their own project designs, adaptations and refinements.
- Heutagogy** – Open ended; determined by the learner.

Implemented Projects

- Pedagogy** – A project that looks and acts like the original model.
- Andragogy** – A project that has some attributes of the original model but that includes the learner's original ideas.
- Heutagogy** – A project that is unique to the learner and to the learning community.

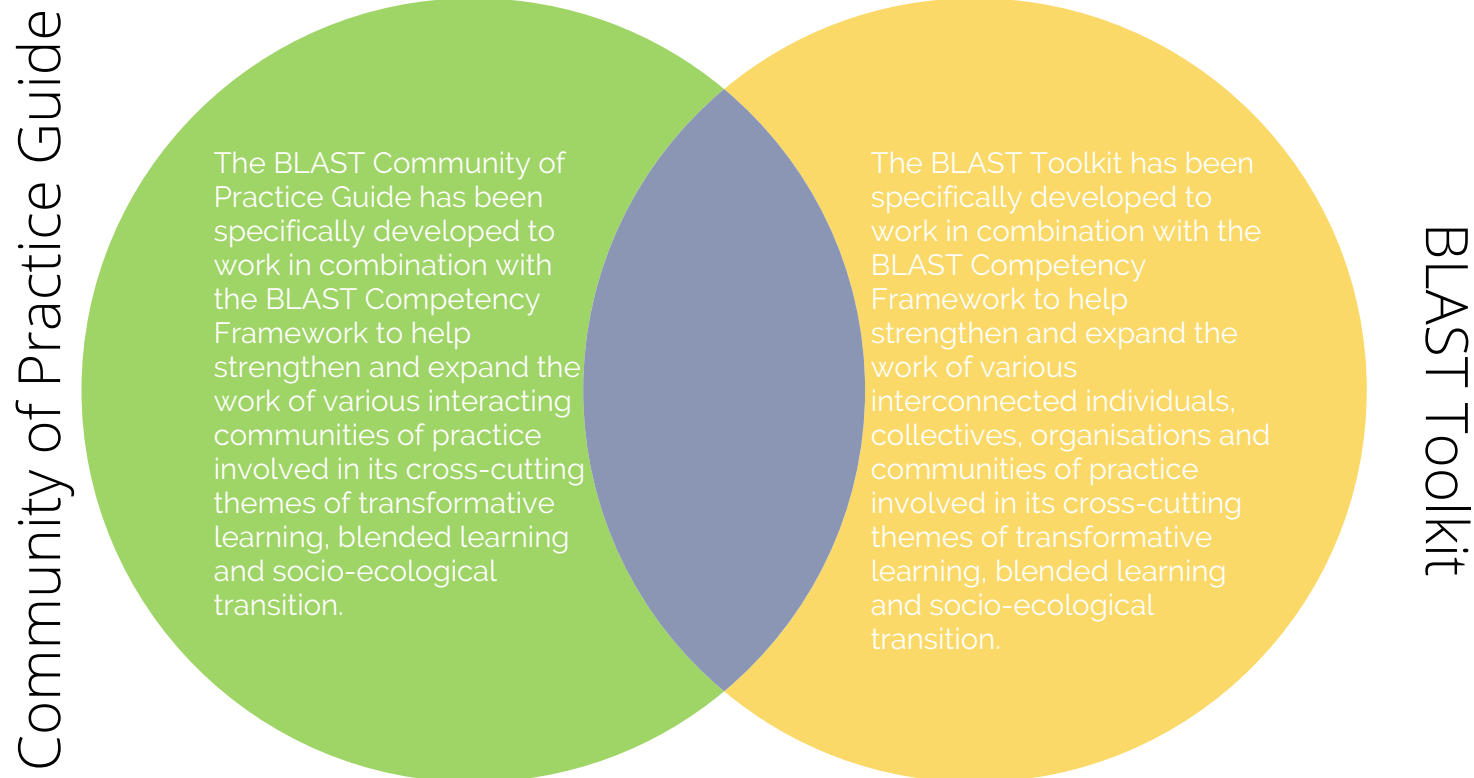
Design and implement transformative learning

Competencies for Communities of Practice

Knowledge, attitudes and skills for working collaboratively across both dispersed and unstructured networks, and organised collectives with common interests in a general field, both to develop the general qualities of practice in that community and to achieve the general objectives of that community where these are identified.

Competence in the selection and use of tools

Competence in the selection and use of tools and methods, including using these in combination, for a variety of contexts, processes and audiences i.e. well-informed and skillful selection and use of tools for mobilising and enhancing all the other competencies, including different types of tools according to the needs of the participants and the specific context e.g. participative methodologies; online tools; etc.



It is important to recognise that in combination with the competencies listed above, specific competencies for catalysing change are needed (not just competencies for facilitating learning). For the goals of the BLAST project, these are particularly needed for engaging, motivating and equipping individuals and collectives to participate in and activate transition, for as long as it takes. For this reason, this framework sets out competencies that are important for the role of **Catalysts**, as well as the role of **Trainers**, with an expectation and encouragement that Trainers and Catalysts will often be working together.

Personal Practitioner Journeys in Transformative Learning

In a co-creative exploration practitioners of transformative blended learning tell from their experiences. We can see patterns of transformative Learning emerge from those conversations.

Interview #1 (30 minutes)

Personal Practitioner Journeys in Transformative Learning interview #1 (30 minutes) with May East of Gaia Education and Steve Charter of IPEN (International Permaculture Education Network) - May and Steve describe their personal journeys, working in the fields of personal and social-ecological transformation. They describe how their experiences, expertise and learning-facilitation roles in these fields have evolved and deepened over time, and their understanding of the patterns that emerge in this transformative learning field and in the personal and collective journeys this involves. [LINK](#)



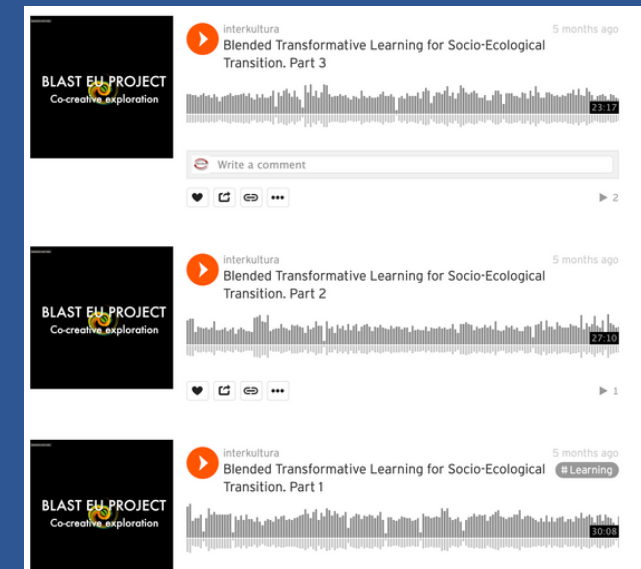
interview #2 (27 minutes)

Personal Practitioner Journeys in Transformative Learning interview #2 (27 minutes) with Paula Haddock (now Paula Sonrisa-Sturmer) of Ulex Network and Mindfulness Trainer and Dr Anna Storck of the Institute for Global Integral Competence - Paula and Anna describe their personal journeys, working in the fields of personal and social transformation. They describe how their experiences, expertise and learning facilitation roles in these fields have evolved and deepened over time, their particular fields of work in transformative learning, and the deep personal and social change that arises from that. [LINK](#)



Interview #3 (23 minutes)

Personal Practitioner Journeys in Transformative Learning with Claudine Villemot-Kienzle of Centre for Human Emergence and Claudian Dobos of Transition Romania - Claudine and Claudian describe their personal journeys, working in the fields of personal transformation and socio-ecological transition. They describe how their experiences and expertise in these fields have evolved and deepened over time, and how they have developed their own particular focus and methods as critical contributions for meaningful inner and outer transformation. [LINK](#)



Questions:

- Can you set the context in which you offer transformative learning?
- Where do you see transformative aspects in your offerings?
- Can you remember one Situation where you felt really challenged and you had to let something go ?

Inspirational & Transformative Resources for BLAST Learning Pathways

The following is a reading and resource list of inspiring and transformative materials that has been compiled from personal recommendations of the BLAST project team. They are recommended from personal experience as being influential for trainers and catalysts that are on a personal or collective learning and development journey, as well as for the individuals, networks, organisations and communities they work with. This is a collection of materials that has had a strong transformative influence on us as individuals, and that we know can be powerfully supportive in deeply transformative processes.

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7. Capra, The Turning Point: Science, Society, and the Rising Culture. *The Turning Point: Science, Society, and the Rising Culture*. Bantam; Reissue, 1984.
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10. Certeau, Michel de. *The Practice of Everyday Life*. University of California Press, 2011.
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13. Fleming, David. *Surviving the Future: Culture, Carnival and Capital in the Aftermath of the Market Economy*. Chelsea Green Publishing, 2016.
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Inspirational & Transformative Resources for BLAST Learning Pathways

16. Gardner, Howard. *Multiple Intelligences: The Theory in Practice*. Basic Books, 2003.
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21. Merchant, Carolyn. *Radical Ecology: The Search for a Livable World*. Routledge, 2005.
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23. Nerburn, Kent. *Neither Wolf nor Dog*. New World Library, 2019.
24. Parker, J. Palmer. *The Courage to Teach: Exploring the Inner Landscape of a Teacher's Life*. Parker vols. Jossey-Bass, 2017.
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26. Rust, Mary-Jayne. *Towards an Ecopsychotherapy*. Confer Books, 2020.
27. Quinn, Daniel. *Beyond Civilization: Humanity's Next Great Adventure*. Broadway Books, 2000.
28. Slade, Samantha. *Going Horizontal: Creating a Non-Hierarchical Organization, One Practice at a Time*. Berrett-Koehler Publishers, 2018.
29. Wilber, Ken. *The Simple Feeling of Being: Embracing Your True Nature*. Shambhala, 2004.
30. Waal, Frans de. *Our Inner Ape: A Leading Primatologist Explains Why We Are Who We Are*. Riverhead Books, 2006.
31. Wahl, Daniel Christian. *Designing Regenerative Cultures*. Triarchy Press Ltd, 2016.
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References particularly relevant to the issues addressed by this Competency Framework could be found on WIKI



MORE ON WIKI



The Four Domains of Competence

This framework's scope is organised in a pattern of four domains in which competencies need to be developed and expressed across the three fields of competence (Transformative learning; Blended learning; and Socio-ecological transition). The character of these four domains is described in more detail on the next pages in each section of the competency framework, so that they can be seen, understood and strengthened in the fields of competence they relate to.

- the Intrapersonal (or Being) domain
- the Interpersonal (or Relating) domain
- the Cognitive (or Knowing) domain
- the Action (or Doing) domain

It is essential for Trainers & Catalysts to understand and communicate to learners and activists that each of these Domains of Competence is interconnected with and effects the other Domains. This is particularly the case where an individual's learning takes place as part of a group or in progressing collective action. For example, the technical knowledge and skill that is required to establish and operate a successful community renewable energy enterprise is only likely to be taken advantage of when the Interpersonal (Relating) realm is well developed within the group, to enable effective collaborative working, good communication, and to develop personal and collective motivation. We also consider General Competencies that combine Intrapersonal, Interpersonal, Cognitive and Action domains.

To be developed in balanced ways these four domains will usually require an understanding of and engagement with the different intelligences, learning styles or modes of learning that most transformative educators will be familiar with.

This variety of intelligences can be expected to be displayed across the diverse audiences that transition learning and action will be engaging with. Therefore to optimise learning across the diverse audiences the trainer or catalyst (individually, or often as part of a team) will need a full complement of competences across the four domains, as each is required in different degrees to engage with and activate the different styles of learning with a reasonable degree of equity across a group.



Trainer Core Competency Framework for Trainers Catalysts

The task of developing a competency framework for blended transformative learning for the socio-ecological transition is a complex one. It is complex both because of the three dimensional nature of this competency framework that incorporates:

- transformative learning;
- blended formats and methods;
- socio-ecological transition,

and also because that complexity has to be made useful, understandable and applicable.

	Intrapersonal Competencies BEING	Interpersonal Competencies RELATING	Cognitive Competencies KNOWING	Action Competencies DOING
Transformative Learning Competencies	TL1: Develop self-awareness of thoughts, emotions, behaviours and intuitions TL2: Be adaptable in the role as trainer or catalyst TL3: Develop clarity in your purpose, values, vision, commitment and motivation to learning	TL4: Create a group container and supportive learning environment TL5: Sense and respond to group dynamics in service of learning TL6: Create safe spaces that can work effectively with discomfort	TL7: Understand transformative learning theory and practice TL8: Know how to select and use tools and methodologies that support transformative learning	TL9: Be able to design, host and / or support a range of non-linear, non-traditional learning experiences and journeys TL10: Anchor learning in experience and practice TL11: Address the needs and potential of trainers themselves
Blended Learning Competencies	BL1: Develop self-awareness in technological learning environments	BL2: Nurture engaging and safe online and offline / in-person environments for participants BL3: Be aware of and responsive to group dynamics in online and offline contexts	BL4: Know how to assess & select technology suitable for the context & audience BL5: Understand what time and skills will be needed to manage learning in a blended context BL6: Know how to design experiential and participatory blended learning	BL7: Design, facilitate & manage blended learning environments and pathways BL8: Facilitate technologically enhanced learning
Socio-Ecological Competencies <small>NOTE: Typically, these competencies will be spread across a team or group ie. it is not expected that any individual would cover all these competencies.</small>	SE1: Recognise multiple identities, intelligences and worldviews SE2: Nurture healthy and constructive mental habits or patterns and demonstrate life affirming dispositions and attitudes	SE3: Engage diverse audiences and sectors SE4: Communicate complexity in accessible ways SE5: Engage participants in building community and working collectively SE6: Respond and adapt to specific bio-cultural and values-based contexts	SE7: Know how to think systemically <ul style="list-style-type: none"> • Know how to Reflect, Check, Test, Monitor and Evaluate Actions and initiatives SE8: Develop critical literacy in sustainability, regeneration & resilience <ul style="list-style-type: none"> • Develop understanding of the importance of Future Thinking, Visioning and Strategic Competencies • Understand the range of competencies needed to bring about socio-ecological transition across communities • Develop literacy in social, economic and political dimensions • Identify biases in thinking • Know how to identify and balance priorities to address multiple dimensions SE9: Know how to select and use tools and methodologies that support socio-ecological transition processes SE10: Know the role of regenerative design in generating socio-ecological transition	SE11: Evolve learning opportunities collectively in response to specific socio-ecological context SE12: Catalyse, facilitate and multiply progressive collective action SE13: Harness existing competencies in all disciplines in service of socio-ecological transition SE14: Be able to design, plan and implement socio-ecological projects and initiatives SE15: Develop experience of regenerative and ethical lifestyles, at individual & collective levels (Walk your talk)
General Competencies <small>that combine</small> <ul style="list-style-type: none"> • INTRAPERSONAL • INTERPERSONAL • ACTION • COGNITIVE DOMAINS 	G1: Be well organised & capable of managing a range of situations G2: Be able to engage in and support relevant Communities of Practice G3: Be able to innovate & be creative when appropriate G4: Be able to demonstrate appropriate pioneer and leadership qualities G5: Develop personal and collective resilience G6: Be able to cost, market and administer learning programmes			



MORE ON WIKI

Core Transformative Learning Competencies

Being

TL1: Develop self-awareness of thoughts, emotions, behaviours and intuitions

TL2: Be adaptable in the role as trainer or catalyst



Relating

TL3: Create a group container and supportive learning environment

TL4: Sense and respond to group dynamics in service of learning

TL5: Create safe spaces that can work effectively with discomfort



Knowing

TL6: Understand transformative learning theory and practice

TL7: Know how to select and use tools and methodologies that support transformative learning



Doing

TL8: Be able to design, host and / or support a range of non-linear, non-traditional learning experiences and journeys

TL9: Anchor learning in experience and practice
TL10: Address the needs and potential of trainers themselves



[MORE ON WIKI](#)

Blended Learning Competencies

Being

BL1: self-awareness in technological learning environments



Relating

BL2: Nurture engaging and safe online and offline / in-person environments for participants

BL3: Be aware of and responsive to group dynamics in online and offline contexts



Knowing

BL4: Know how to assess & select technology suitable for the context & audience

BL5: Understand what time and skills will be needed to manage learning in a blended context

BL6: Know how to design experiential and participatory blended learning



Doing

BL7: Design, facilitate & manage blended learning environments and pathways

BL8: Facilitate technologically enhanced learning



[MORE ON WIKI](#)

Socio-ecological Competencies

Being

SE1: Recognise multiple identities, intelligences and worldviews

SE2: Nurture positive mental habits or patterns

SE3: Demonstrate positive dispositions and attitudes



Relating

SE4: Engage diverse audiences and sectors

SE5: Communicate complexity in accessible ways

SE5: Engage participants in building community and working collectively

SE6: Respond and adapt to specific bio-cultural and values-based contexts



Knowing

SE7: Know how to think systemically

SE8: Develop critical literacy in sustainability, regeneration & resilience

SE9: Know how to select and use tools and methodologies that support socio-ecological transition processes

SE10: Know the role of regenerative design in generating socio-ecological transition



Doing

SE11: Evolve learning opportunities collectively in response to specific context

SE12: Catalyse, facilitate and multiply collective action

SE13: Harness existing competencies in all disciplines

SE14: Be able to design, plan and implement socio-ecological projects

SE15: Develop experience of regenerative and ethical lifestyles



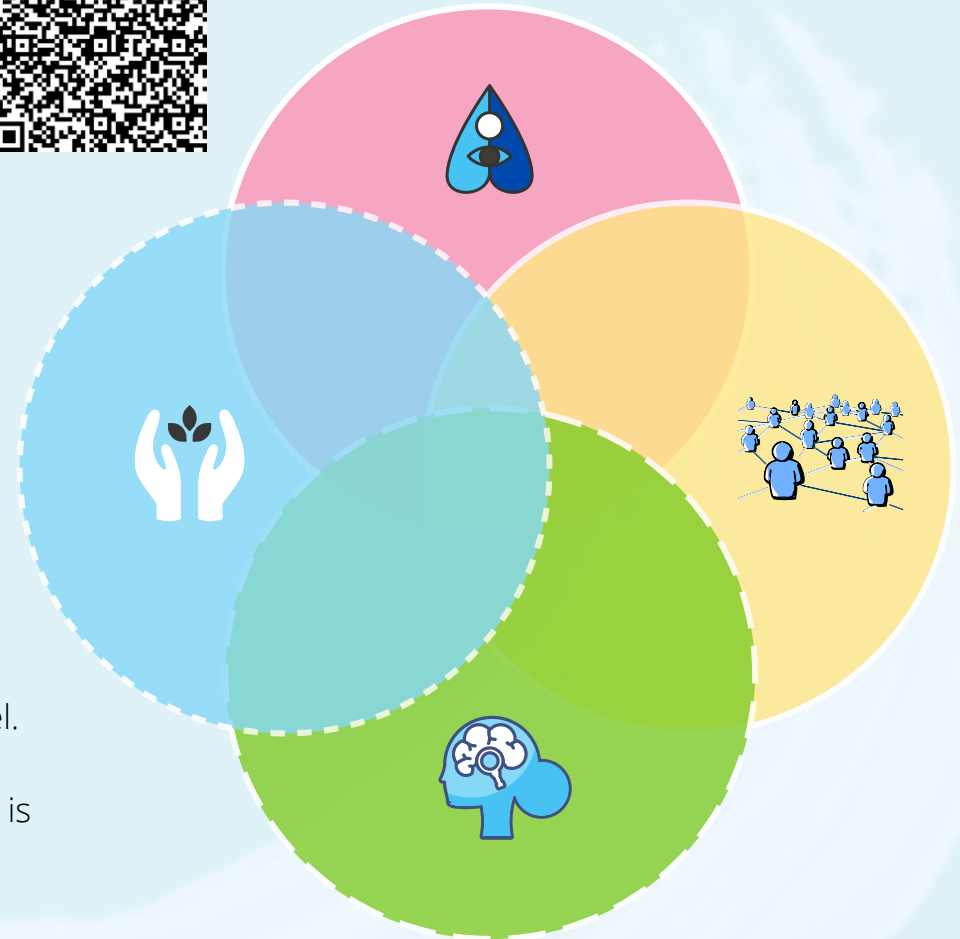
[MORE ON WIKI](#)

General Competencies that combine Being, Relating, Knowing and Doing

- G1: Be well organised & capable of managing a range of situations
- G2: Be able to engage in and support relevant Communities of Practice
- G3: able to innovate & be creative when appropriate
- G4: Be able to demonstrate appropriate pioneer and leadership qualities
- G5: Develop personal and collective resilience
- G6: Be able to cost, market and administer learning programmes



Transition at any level requires an ecology of inter-related competencies to be in place across a sufficient number of people in that community to enable transition. These competencies need to be planned for, maintained and developed over time, at both the individual and collective level. From this perspective, one goal for Trainers and Catalysts for Transition who use blended transformative learning methods is to help a community generate that ecology of inter-related competencies, over an extended period of time.



[MORE ON WIKI](#)

Competencies for Hosting Roles

A range of competencies are needed for hosting individuals and teams that are involved in developing and delivering Blended Transformative Learning programmes.

Importantly, this approach distinguishes the role and competencies of hosts, rather than trainers/catalysts. The hosting role is a key supporting role that enables trainers and catalysts to focus on the learning and engagement process and activities, while the hosts focus on the technical, set-up, venue, logistics and other issues that allow the training and engagement activities to flow smoothly and be productive. Often, particularly at the initial stages of socio-ecological transition initiatives or in situations lacking resources and people power, trainers and catalysts may have to cover the hosting role themselves.



There are a range of competencies which are needed for participants in transformative learning in a blended learning environment, within a context of socio-ecological transition.

It is therefore important for trainers and catalysts to identify these transformative learning competencies and blended learning competencies in learners or enable those learners to access and develop them in order to be able to optimise the benefits arising from their blended transformative learning experiences. In general, the better developed are these competencies amongst the learners, the more they will get out of the learning process facilitated by trainers, and hopefully therefore the more substantial will be the work towards transition - so it's important for trainers, and ideally for learners, to be aware of these learner competencies.



*Thinking in terms of Competencies emerged as a way to move beyond narrower concepts in education of 'skills' and 'knowledge' - and from the recognition that every job or role requires a set of competencies to do it well.
So self-knowledge, motivation, and desire to fulfil a role well
can all be understood as competencies.*

MORE ON WIKI

Face-to-Face Learning, Online and Blended Learning: Advantages

FACE-TO-FACE LEARNING

- Deeper engagement with educators, other learners and learning experience.
- The potential to host the learning experience in environments that enhance learning (e.g. demonstration projects).
- More opportunities for relationships to form during informal time (between trainer and learners and between learners).
- Experiences and interactions with the body
- Experiences and interactions in the space as supporting learning.
- Day-long sessions with unplanned informal meeting opportunities.

ONLINE LEARNING

- Potential / Flexibility to engage: from various locations e.g. home, place of work, while travelling.
- On your own timetable (if course is recorded or online tasks, but not if it is online access to a fixed event).
- Mass access is possible - can enable equity, diversity and inclusion E.g. it can make the learning initiative more affordable (if cost savings are shared with participants); flexible attendance times can support those for whom attending in person would be prohibitive.
- More opportunities to revisit material as and when you need to.
- It can allow access without travel which potentially increases choice and improves ability to choose supplier based on quality rather than proximity.
- Time saving for participants.
- Logistics optimization.

BLENDED LEARNING

- Potential to design learning experiences to use the advantages of both in-person and online learning.
- The program can be carefully designed to decide what learning aims need to be delivered face to face and which can be done online.
- Can increase reach and networking by offering opportunities for in-person and on-line participants at the same time.

Face-to-Face Learning, Online and Blended Learning.

Disadvantages

FACE-TO-FACE LEARNING

- More expensive when there are venue costs.
- Limitations on numbers of participants
- Travel to venue can incur environmental cost (flights, driving).
- Often have to take place over shorter time frame due to cost which can make learning goals unrealistic (less time for putting learning into practice).
- Often happen as one offs so difficult to track learning outcomes or impact on behaviour and beyond.
- High level of logistics.
- Limited access for disabled people.
- Time consuming for participants (Organizing travel, venue..).

ONLINE LEARNING

- Body language and subtle interactions are missed.
- Technology requirements may be too high for some people to run.
- Technical problems can prevent or dilute participation and create stress during the learning process.
- Often requires additional support people to support with technology.
- Easy access can lead to accessing in distracting situations and more susceptible to have attention hijacked from other programmes running on the same machine.
- Reducing barriers to access may lead to more diversity in the group which means the programme needs to be designed and trainer needs to be skilled to support that.
- It can be more challenging to work through conflict online.
- Day-long sessions not recommendable.

BLENDED LEARNING

- Each mode of training requires different skills and competency from trainers and often trainers are only experienced in one mode; assumptions are made about transferability of training skills without sufficient support.
- If a programme has blended option or online only option then it can be difficult to maintain a whole group experience and may also create feelings of marginalisation or isolation.
- Technically demanding as it needs additional equipment in the physical room (notebooks, cameras...) to connect to the online participants. And one trainer for focussing on technical aspects.

T4T

TRAINING OF TRAINERS

“We define learning as the transformative process of taking in information that, when internalised and mixed with what we have experienced, changes what we know and builds on what we can do. It's based on input, process, and reflection. It is what changes us.”

YOGI BERRA

This course will be of interest to you if...

Learning goals

Content and Methodology

Target Group

Who is this course for?

What is this T4T about?

Feedbacks

Future steps

Assessments

T4T

This Training of Trainers is designed to enable you to understand how to learn with others in a Community of Practice and how to make best use of the BLAST Toolkit to support community-based learning for socio-ecological transition.

**Online Training of Trainer 2-day Event
Offered by the BLAST Project**

Date: 20 & 21st November 2021

Learning Objectives of BLAST T4T

The BLAST project included a training of trainers to dive deeper into the competencies, CoP guide and range of tools. The course can be run again and will be offered as an online course from 2022.

This course will be of interest to educators who want to...

- explore the key competencies educators and communities need to build to support the transition to just and regenerative future.
- shift towards blended learning to make your educational offers more accessible and relevant to people's everyday work.
- deepen the transformative nature of learning to bring about deeper shifts in mind-sets, behaviours and cultures.
- be part of a new community of practice (COP) of trainers working on the same goals - and experience how COPs themselves can be a vehicle for bringing about change.

As well as exploring the points above, this course explores the key competencies educators and communities need to build to support this transition. It presents and explores the new communities of practice guidebook - developed by the EU funded BLAST team. The course covers four key competency areas which are key to all transition efforts: interpersonal, intrapersonal, cognitive and action.

Who is the course for?

This course is for those working in adult learning or training environments, or in facilitation of change specifically within environmental, sustainability, climate action and/or transition sectors:

- Trainers & Catalysts - both Individuals and Teams, including mentoring and coaching roles
- Hosting - Organisations, Venues and Networks
- Participants in Learning & Action - both Individuals and Groups (see Appendix)

Your BLAST Pathway CANVAS

COMPETENCIES

From the BLAST Competency Framework table :

a) reflect on your existing competency strengths in transformative learning, blended activity, and sustainability & climate action

On Your Table of Competencies:

- Identify your 3-5 main strengths
- Identify 3-5 competencies you want to develop or strengthen

b) identify and reflect on your balance of strengths in relation to the intrapersonal, interpersonal, cognitive & action domains

List your insights or understandings in relation to:

- intrapersonal domain
- interpersonal domain
- cognitive domain
- action domain

YOUR BTL FOCUS

Your course or programme that is your main focus for delivering BTL

PROGRAMME

A compelling message about why your course or programme is worth paying attention to

PEERS TO WORK WITH

People to work with to develop your competencies & programmes

TARGET CUSTOMERS

List the learners you want to reach

METHODOLOGY

List the key tools or methods that will enhance your work

MOTIVATION

Describe what excites or motivates you in this area

LEARNING PATHWAYS

Your main learning pathway(s) to enhance competencies you want to strengthen

INSPIRATIONS

Ideal partners, mentors or sources of inspiration / deeply transformative examples to learn from

COST

List any fixed or ongoing costs involved in developing this pathway i.e. courses; subscriptions; etc.

INCOME / REVENUE

List sources of income / revenue arising from pursuing this pathway i.e. new ways you can deliver courses - or new ways you can generate revenue e.g. post-course online mentoring

LEARN MORE

Feedback

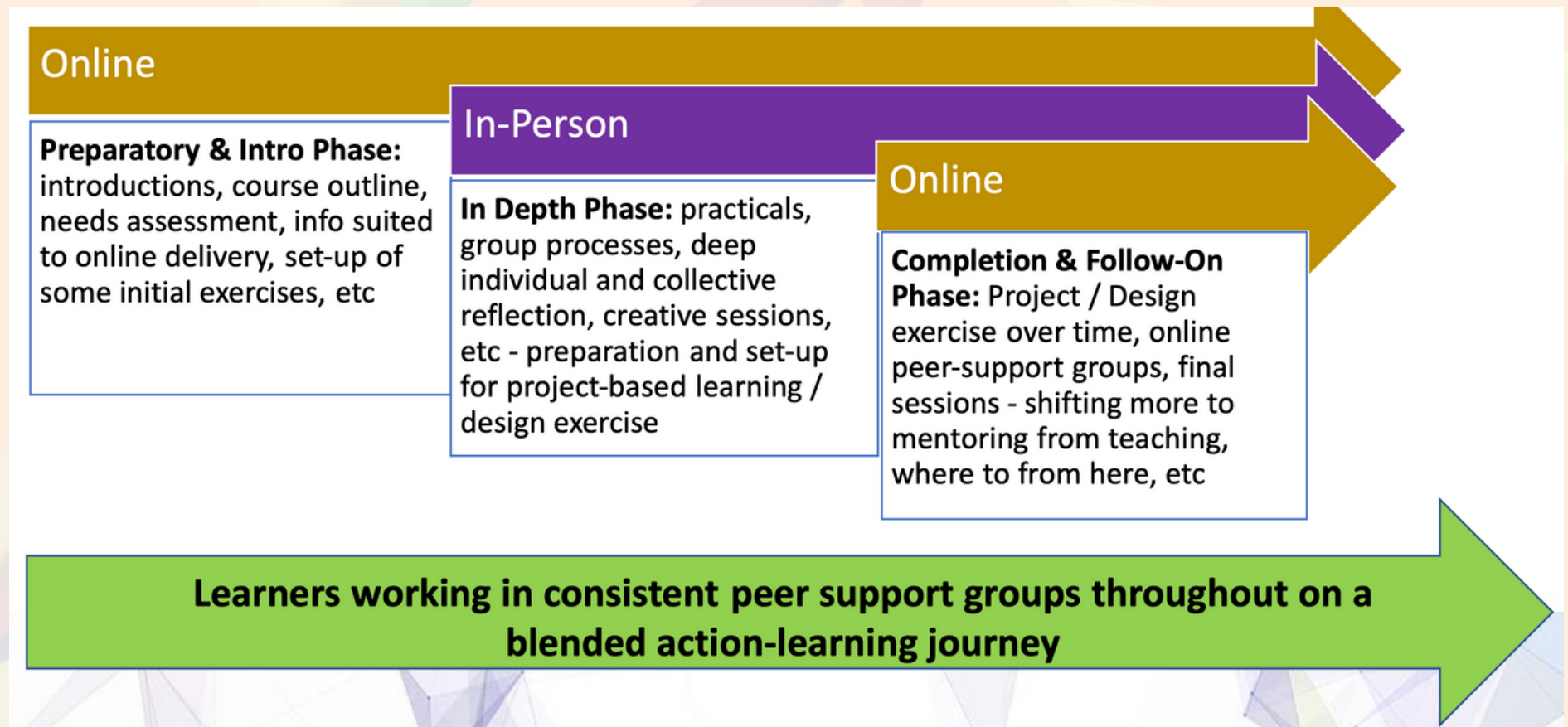
"This course is super useful and inspirational"

"Thank you that I had the chance to participate in the workshop. For me it was a colorful bouquet of people, ideas, methods, tools."



Future steps

The BLAST T4T course is around 16 hours (in November 2021, it was delivered as a full weekend) with some pre-course exercises. The course will be available as a self-directed online course from 2022. Idealised Blended Transformative format will possibly run as a online*in-person pattern e.g. 4 long weekends in-person + fortnightly online sessions between.



Final words from BLASTers ...

In this document, you can see the outputs of BLAST's partnership. What is harder to evaluate is the transformative effect in the partners themselves.

- How much did we learn to work with one another and, by consequence, did we become better educators and facilitators?
- How much did our organisations change based on the learnings and experiences of the dynamics developed during the project?

Challenging one another beyond the initial scope of BLAST, partners strove to implement the 3d evaluation framework and developed a JEDI guide (Justice, Equity, Diversity & Inclusion) for reframing their own ways of working. And of course, adapted on how to explore blended transformative learning through a global pandemic.

It is clear that the learning journey is not over. All outputs are living documents that will continue to receive feedback and improve; the toolkit will be continuously curated; the Community of Practice of blended transformative educators already has monthly meetings planned; further projects and ideas are being developed - such as the Community Climate Coaches vocation development.



The background of the image is a soft-focus photograph of tall, thin grasses with delicate, feathery pink seed heads. The lighting is bright and diffused, creating a dreamy, ethereal atmosphere. The colors are primarily shades of pink, purple, and white, with some green visible at the base of the grass.

*"Never doubt that a small group of thoughtful,
committed citizens can change the world;
indeed, it's the only thing that ever has."*

MARGARET MEAD