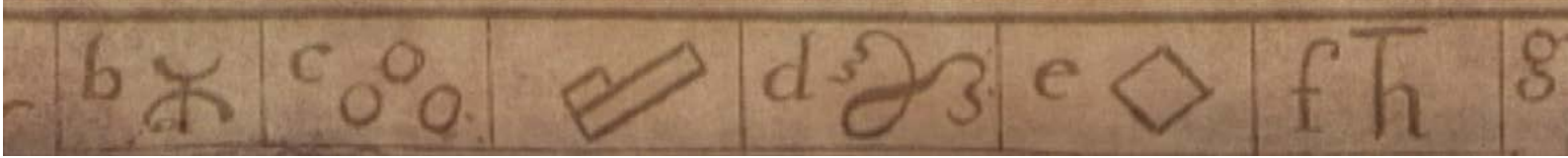
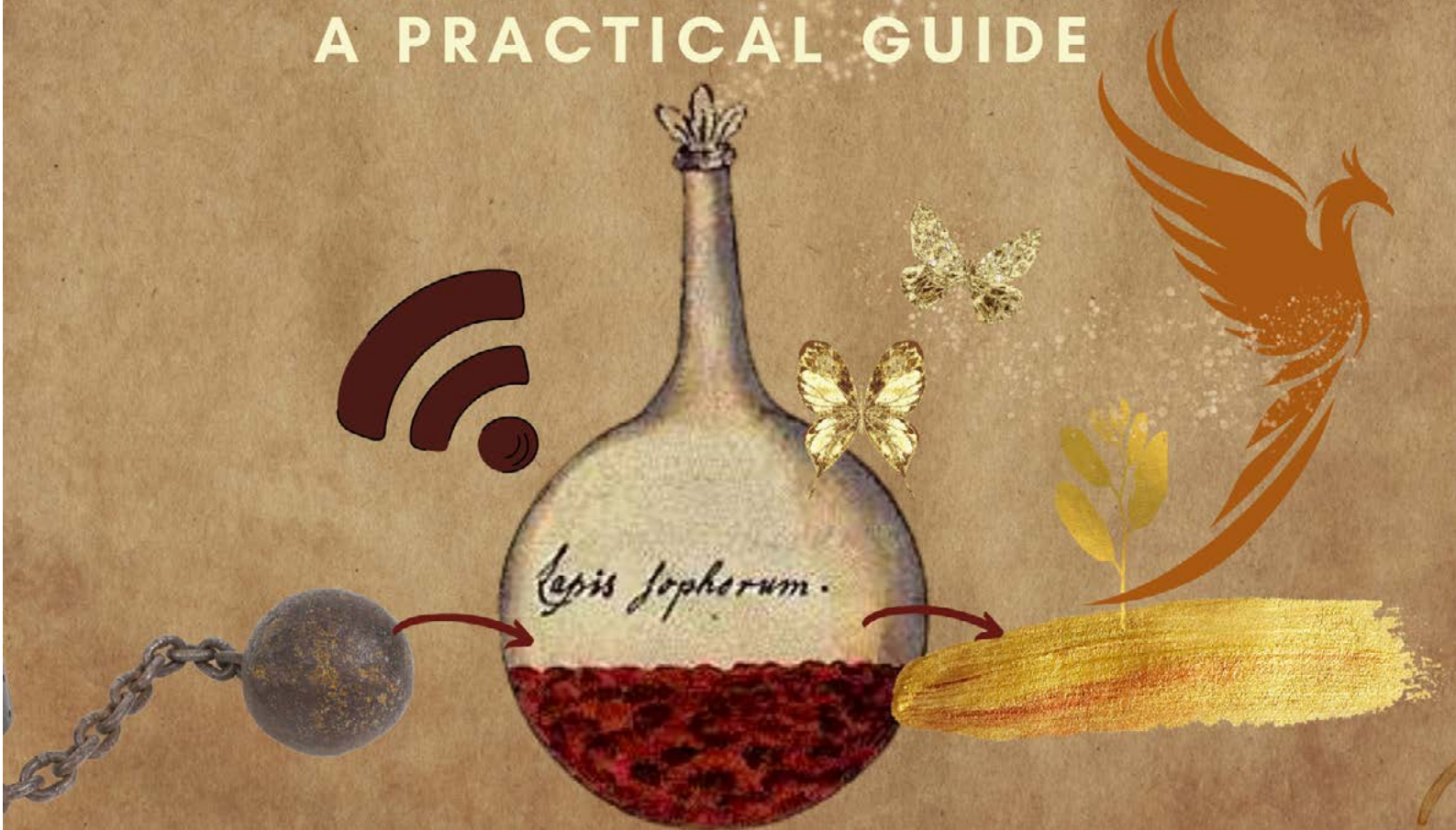


# Online Alchemy

HOW TO BOOST  
TRANSFORMATIVE LEARNING ONLINE

**A PRACTICAL GUIDE**





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Co-funded by the  
Erasmus+ Programme  
of the European Union

### Erasmus+

This book evolved out of the Strategic Partnership “Online Transformative Learning”. The development and the printing of this book was made possible by the generosity of the Erasmus+ Programme, but this is not an official EU publication.

The European Commission's support for the production of this publication does not constitute an endorsement of the contents, which reflect the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.



Online Alchemy

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# Ingredients for Successful Transformative Learning - online and offline

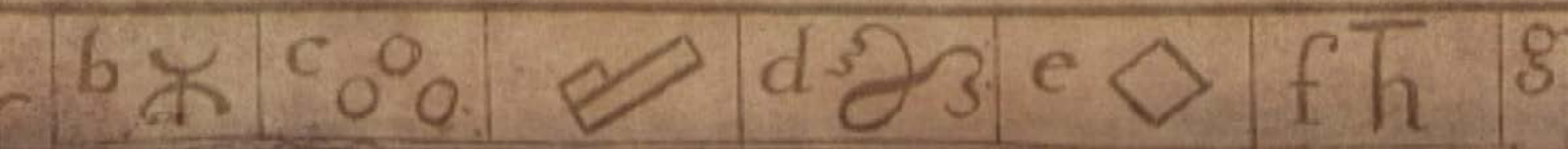
Even though alchemy has the power to turn lead into gold and to perform other outstanding refinement processes, the choice of basic ingredients is of paramount importance. In this series entitled “Alchemy of Transformation - how to boost transformative learning online and offline”, we share our insights from 65 online experiments and interviews and 10 exchange sessions among practitioners carried out in our European research project “Online Transformative Learning”. The insights presented here have also benefited from our long-term experience of impactful offline transformation processes.

## The project and partners

“Online Transformative Learning” (OnTL) was an exploratory project to chart the limitations of and opportunities for transformative learning in an online setting, covering formal, informal, and non-formal adult education, conducted from September 2020 to December 2021 - a period of highly accelerated digital communication development due to the COVID-19 pandemic. A full report on the process and findings is available [here](#).

ONLINE ALCHEMY-  
HOW TO BOOST TRANSFORMATIVE LEARNING

# Online Advantages in Transformative Learning





# Transformative Learning - Online Advantages

Authors: Annika Piirimets and Jasenka Gojsic

Surprisingly much from the offline environment can be carried out online with similar functions and effects. And then there are aspects that are *better* online. What are those digital advantages in the field of transformative learning for an educator? And could it be that some exigencies of the online environment are transformative in themselves?



# 1. Increased possibilities for connection

Although evident and self-explanatory, the online potential of connecting people cannot be overstated. Getting together with others is the fertile soil of our growth. With ease, in pyjama pants and a double click, we can transcend the limitations of geography and connect in ways that cross other, less tangible boundaries:

...those inherent in our hierarchically organized societies and working lives (disciplines, sectors, rank)

...those that are culturally determined (lifestyle, modes of expression, lines drawn between the formal and the informal)

...those between ,work' and ,life' (eg our personal space can become visible)

Furthermore, new opportunities open to form interpersonal relations for instance through access to a wider range of mentors, coaches, therapists.

These advantages become available not only to our participants/students, but also to us, their facilitators or educators.



PAY  
AS YOU  
WISH

## 2. Cost

If we take hardware and software as given, the cost of bringing people together online is usually low. This allows for more flexibility regarding the number of sessions, duration of the program, or length of the gatherings - in short, better conditions for learning.

Also, it is mind tickling to think about what could be done with the unused physical facilities. The size of a school building no longer needs to limit the number of students enrolled: they can attend the premises in shorter shifts and parts of the learning can take place online. A community could use public school facilities in ways that could financially benefit other sectors.



## 3. Inclusion

Not having to take geography into account already makes a world of difference for supporting inclusion, but it doesn't stop there. Other thresholds for participation are also lowered, for example for those who have disabilities, illnesses, or are stuck in quarantine.

And here is a riddle for the digital age: Who is invisible, but is still potentially feeling more included in an online group, than someone who is visible? Answer: a participant with their camera turned off, a person who risks being discriminated against, judged, or excluded based on physical appearance.

Another question is, what happens to the feeling of inclusion, self image, and team building now that we for the first time can observe ourselves from 'outside' as a member of a group, when seeing ourselves in gallery view?

Moreover, the forbidding institutional power of buildings is reduced since buildings can be made available for other purposes - inclusive instead of excluding, respectful of other users' needs, where people from different organisations benefit from one another, in short: where people build a sharing culture and make buildings living entities.





## 4. Integration time

With or without a lower cost, online operations provide immense opportunities for the duration of a course/program. In our efficiency-seeking and pressed-for-time lives, we cannot escape the fact that some things do take time. Relationships require time. Trust may take time. Integration of learning and new behaviour benefits from time. The brain's neuroplasticity needs repetition and many iterations of experiences to make things stick.

Online follow-ups and sessions for integrating new understanding and skills regularly and over a longer period of time is a vastly superior strategy for learning, compared to a once or twice-off workshop face to face.



# 5. Variation

Another aspect where the online realm has an edge is variation. At little or no extra cost, participants can be offered a variety of experiences and indeed choices to suit their lifestyles and preferred learning modes.

When planning for the program design and structure, there is a large smorgasbord of choices:

- Individual work with asynchronous/self-study learning platforms (e.g. MOOCs, videos)
- Synchronous webinars, events, and conferences
- Peer coaching, learning buddy systems
- Individual or group coaching by the facilitator

They can be further extended by combination with offline elements, either simultaneously (hybrid) or in separate events (blended learning).

As for materials, some verbal items can be made available as a choice of text, audio, or video. When using written and physical materials for an exercise, there is sometimes the option to distribute them in advance; but there is also the option to invite and enable participants to locate suitable materials in their own environment, making the exercise more personally relevant and the experience of the group more diverse.

The possibility of locating course materials in their 'home' environment (whether literally at home, or in the participant's own workspace) is just one example of the opportunities that online learning offers to bridge the gap between learning and doing. For instance, a workplace program can bring in aspects of the workplace and an environmental program can bring in aspects of each participants' actual environment, whether in the community or at home.

Variation is also about flexibility.



## 6. Flexibility

Some things are more inconvenient and outrightly disturbing offline, such as participants physically moving around. Online there is more physical flexibility for generating comfort, and in connection with the actual work and learning. Attending a meeting on platforms such as Zoom, you can sit or stand, walk and talk (even outside), stretch and move around in the (presumed) comfort of your own home or workspace. It is recommended that such behaviour is agreed upon within the group, and that a message is left in the chat if someone leaves the group.

Synchronous group work has advantages online. You can enable flexible choice of group rooms, as well as have participants move freely between breakout rooms, or between breakout rooms and the plenary, without the disruption this would entrain at a physical event.



## 7. Safety and boundaries

The possibility of being anonymous or distant from other participants potentially reduces fear. A sense of reduced interpersonal risk and increased safety may lead participants to dare more: ask more questions, have instructions repeated; and it removes some of the barriers to engaging in significant inner work, such as having more intimate exchanges with each other. Also, it can be easier to respect one's own boundaries when the online environment offers less peer pressure, and for example opt out of activities and exercises.





## 8. Facilitation and communication

The obvious inconvenience online is the loss of touch, smell and seeing 360 degrees in 3D. A couple of the senses are helped, though. Providing that the technology is adequate, it can be easier to hear each other online, especially with headphones. Video often allows us to see each others' faces better in gallery view and speaker view than in a lecture hall or classroom. This makes a big difference for the deaf or hard of hearing who read lips.

Facilitators also benefit from a better overview of people's faces and their reactions when they fit into one online conference screen. Reactions can also take the shape of non verbal communication like comments in a chat, emojis like hearts or fireworks and confetti, or physical hand gestures shown on screen like thumbs up or applause. People are not as instantly expressive offline.



## 9. Fertile soil for your own transformation?

The online environment may entail increased self knowledge, or self development of the educator. Having to take the role of a learner when adapting to online teaching/facilitation may result in some personal insights, and perhaps more empathy for students/participants.

A hypothesis is that the time and effort invested in learning to become a good online facilitator/teacher, in turn benefits offline practises. Also, the digital landscape forces us into a certain measure of uncertainty, and hopefully increases our tolerance for it. The ability to handle uncertainty and loss of control is fertile ground for transformative learning.



# 10. Unforeseen possibilities

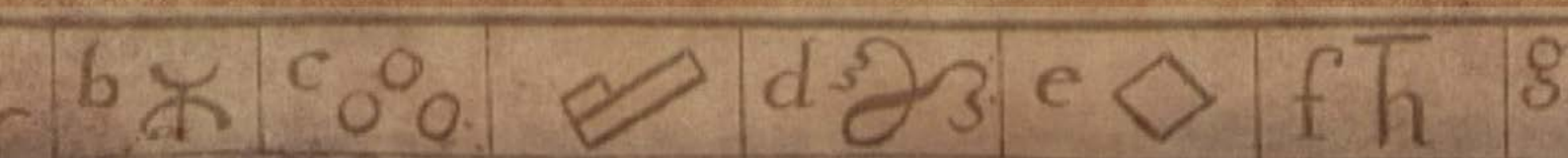
The forced online fraternising induced by the pandemic brought an expanded experience of what is possible. The full potential of the online context was hard to see - until we did, and had to. Could we use this realisation for other needed changes as well? We are only limited by our thinking and habits of mind. As the head of an educational institution exclaimed after its programs went online due to the pandemic:

So much more is possible than we were able to envision!

ONLINE ALCHEMY-  
HOW TO BOOST TRANSFORMATIVE LEARNING

# Safe Enough Space

OR HOW CAN I BUILD A BASIS OF TRUST?



# Safe Enough Space or How can I build a basis of trust?

Authors: Boris Goldammer and Jutta Goldammer

A critical ingredient for successful online transformative learning is trust. Especially in online collaboration, the importance of this ingredient is often underestimated. The more daring a transformation process is and the more it challenges the status quo, the more indispensable trust is: trust in the group, trust in the facilitator, trust in oneself and one's own place, as well as trust in the efficacy of the development process.

Moreover, there needs to be a basic feeling of „I am safe, even if everything around me is shaking“. For learners/participants, transformation processes mean letting go of the old, outdated and engaging with the new, unknown. This liminal state comes with often uncomfortable “edge emotions” and can - if not embedded in a basic feeling of security - quickly lead to resistance to the development process. In an atmosphere of trust, security, and mutual support, on the other hand, transformative learning and development processes can flow with curiosity, joy, and ease.

A good balance between safety and challenge is required. “Each one of us has our own sphere of safety; and as long as we remain snugly within it, no transformative learning will take place. On the other hand if we are thrown too far out, there is a risk that fear will dominate and prevent learning.” (Biester & Mehlmann, 2020, Vol 1) We call this sphere “a safe enough space”.

So what helps to create safe enough spaces?





# 1. Start with trust-building activities - it's worth the investment

Many groups and teams, especially when they have high ambitions, tend to dive right into the content of their topic. Often they feel the pressure to produce immediate results. Getting to know each other and trust-building activities often seems to them a distraction from the topic that brought them together.

You can do yourself and your group a favour if you insist on setting aside ample time for activities that help everyone to get to know the others as whole people, with their own values, ideas, hopes, dreams, fears, challenges, and expectations. Help your participants to build personal relationships.



## 2. Make sure everyone can be seen and heard

Giving your participants the feeling of being seen and heard is mostly about supporting a good connection between the participants, but it is also about being physically visible and audible, especially online. Here are some very easy actions you can take to make everyone be seen and heard:

- Invite your participants to say something at the very beginning. Their names, a check-in with a focus question, just a sentence about why they are here or about their day, anything that gives the participants the experience that they have already engaged in some way in communicating and that it was not so difficult. Ideally, provide impulses that invite participants to shine or show their strengths. Many participants find it easier to speak up later in the session.
- Create spaces in which it is easy to show oneself. Usually breakout sessions in small groups or pairs make it much easier for shy people to speak up or show themselves.
- Invite your participants to use different means of communication, according to their preferences. For introverted people it is often easier to write something in the chat than to speak. Be aware, though, that the spoken word is usually perceived as more powerful. You can compensate for this difference by reading out what people wrote in the chat and directly referring to it. This is also helpful if the group is so large that not everyone can be part of the conversation.
- There are beautiful exercises that can inspire your group to really see each other and carefully watch and listen.



# 3. Create a culture of appreciation

Being seen and heard does not only mean being noticed by the others in the group, but also being valued - with one's thoughts and ideas and as a person. But appreciation goes beyond that, it nourishes a culture of emphasizing strengths rather than weaknesses and mistakes. Some possibilities are:

- Encourage your participants to switch on the camera and to give each other visible feedback in the form of enhanced nodding, thumbs ups, hearts, waving hands or any other kind of cheering. Small sounds of agreement in the form of aha, yes, hhhmmm, sounds that we automatically use in face-to-face situations, are difficult to convey online and you encourage the speakers a lot in giving visible feedback instead.
  - Celebrating success is an easy way to establish a culture of appreciation - and is easy to forget. Right after meeting an objective, people tend to focus on things still to be done. This can be marked in very small ways, like commenting that the group has managed to complete an agenda item in time or has reached consensus; or reflect a milestone, for instance by creating a stage to present results in a worthy setting. What can also be helpful is to introduce a gratitude ritual such as collecting one gem each at the end of a session - e.g. a good idea, a new insight, a special moment or even a little festive ceremony.
- Get additional inspiration from the appreciation-enhancing exercises in our toolbox such as [Gratitude Circle](#), [Highlights Reel](#), [Open sentences on gratitude](#).



## 4. Model vulnerability

The easiest way to show your participants that they are allowed to show themselves as whole persons - not only with their most attractive side but also with their weaknesses, difficulties, and insecurities, is to allow yourself imperfection. How? Admit mistakes instead of hiding them, show your feelings, model a culture of learning where you are also searching and questioning instead of being the presenter of the truth. Make sure, though, to radiate groundedness and confidence at the same time.

Modelling vulnerability is not expressing a weakness but a strength. It requires extra confidence from you with the firm belief that you will be OK and that your participants will accept you as you are, so this is not for beginners. Especially if the group is insecure, it can be unsettling for your participants if they feel you are confused, uneasy or don't know where you are heading with the group. So short formula: be at ease with uneasiness.

Another good possibility to professionally deal with uneasiness is "transparent friction". If a difficult situation comes up in the group, use it and put it into the centre of attention instead of hoping that it will roll past quickly or that nobody will notice. Invite your participants to shift perspective and reflect on the situation from a meta-level. This is not only a tremendous opportunity

for learning and insight but also shows the group how to maintain their capacity for action in situations of conflict or difficulty.





## 5. Cherish diversity

If your participants have things in common it is much easier for them to accept each other with their differences. This can be a common purpose they strive for, similarities in thinking or working styles, common persons they admire. Sometimes something very small like having common acquaintances or coming from the same country or even village is already enough of a base for benevolently looking at all the things that are different. You can also invite reflections on the common ground of being human with hopes and fears striving for happiness.

Make diversity transparent and laugh about it. There is so much to laugh about if you compassionately observe people's unique ways of reacting to certain situations, of seeing the world and of expressing themselves, even prejudices about different cultures or disciplines.

Remind your participants that they complement each other in their diversity. For example, a typical mixture of participants in a project group who sometimes challenge each other's ways are dreamers, planners, and doers in a project. You can ease their discomfort with one another by reminding them that there are different phases within the project to which they will each be able to contribute their strength or preferred approach - allowing the learners to lead as well as follow.

Curiosity is a wonderful door opener for diversity. Be curious about the unique personalities within your group and infect the others with your curiosity. And encourage your learners to curiously discover and nourish diversity within themselves.

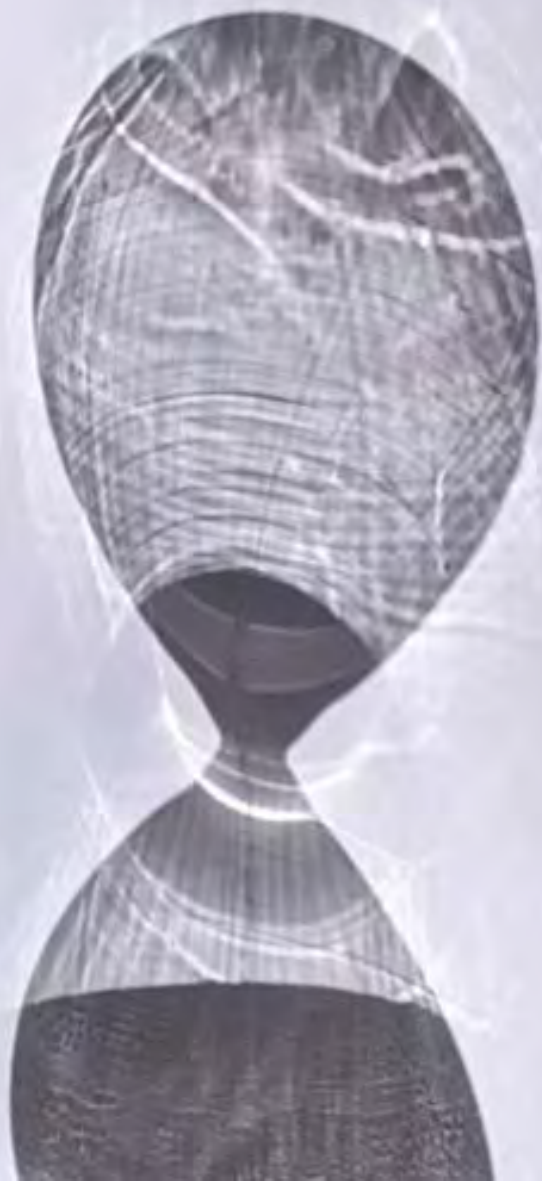


## 6. Enhance participants' trust in you as a facilitator and your facilitation

Provide a reliable, transparent structure that conveys that you know what you are doing and why. This starts with the way you invite participants to the event, and continues with the information you give beforehand, the frame you offer for exercises, and clear announcements about timing, expectations, and instructions. This is especially important at the beginning and even more so when you are new to the group.

Keep a good balance between under-structuring and over-structuring. Under-structuring leads to uncertainty, a perception of low quality, and lots of distracting questions you will need to answer as a facilitator. Over-structuring tends to inhibit transformative and experiential learning and easily causes frustration by reducing or eliminating opportunities for personal initiatives.

The way you introduce yourself is crucial to strengthen the participants' trust in you. If possible let someone else introduce you, preferably a person who is already known and respected by the group, e.g. a leader from the organisation that invited you. Give your group reasons to trust you, background on your relevant education and experience, as well as personal stories that tell them that you know what you are talking about and give them a personal impression.



## 7. Work with “What if” Settings and expiry dates

It is much easier to be at ease with something new, unknown, or unfamiliar if you can be sure it only lasts for a while, such as going on a vacation in a foreign country with the clear perspective that you will return to your old life with familiar food, language, and habits within a fortnight. Make use of this effect and help your participants lose their fear of new ways of thinking or behaving by inviting them into clearly defined holidays from their status quo.

A good way to do this is to invite them to just step into the new with their imagination. Assure them that they do not need to change anything, just imagining what it would be like if they admitted a certain thought/picture/scenario/decision for a while - a minute, an hour, or the time of today's learning session.

Or you can agree on a certain time during which your participants try out a new habit, which could be several days, weeks, or months depending on the topic. Usually even people who hesitate to try new things can cope with an innovation if it is for a limited time. After that time the new way is no longer so new and frightening, and it is easier to judge if the old or the new is the better solution, as the participants have already experienced both.

Just make sure to reliably revisit the temporary decision or the topic of learning when the expiry date is due, in order to strengthen the trust that a temporary decision is really temporary and does not sneak in stealthily as a permanent state or solution.



## 8. Create intimate spaces

Most participants find it easier to talk freely, to ask questions, to show themselves and to take risks or make mistakes in smaller settings rather than a big audience. Especially if you have a large learning group and especially if not everyone is familiar with one another you enhance the safety for your learners if you create many opportunities to work together in small groups or pairs. Make sure those intimate spaces are really intimate and don't disturb them by invading their breakout group without prior announcement.

Give also the freedom to determine their level of self disclosure according to their ability to expose themselves, which can vary from moment to moment. Online settings are very supportive for that. The participants can be part of the learning process even if they have their camera and microphone switched off. Or they can share their ideas on an electronic whiteboard without being seen.





## 9. Hold the space for edge emotions

Stepping out of the comfort zone into a transformative experience that might challenge basic assumptions often feels unsettling and affects the learner's inner stability. It takes courage to leave the old shore and navigate through the "not yet", the liminal state, towards a new shore. Usually this liminal state is accompanied by "edge emotions" that are sometimes not easy to endure. These edge emotions are dealt with in more detail elsewhere, but here are some tips concerning their relationship to 'safe enough space'.

- Make sure the discomfort does not become too overwhelming for your learners, otherwise they may get stuck in the liminal state for longer than necessary or may fall back to the old, so choose carefully the challenges for your participants and make sure they are in a good relation to the trust you have established within the group.
- Consider that the ideal mix of comfort and discomfort is different for every person. Guide your learners to the point where they can host themselves with their needs in this process.
- Dedramatize the edge emotions. Allow your participants to feel and show those uncomfortable feelings, let them know it is natural in a transformation process and that there is no reason to be ashamed of it.
- Sometimes for bystanders it is even more difficult to endure edge emotions and they might unconsciously sabotage the transformation process. Don't let fellow students interrupt the process by over-soothing or denying the discomfort of their peers.

# Was uns wichtig für den Umgang ist, miteinander

Du bist du

Host Yourself



Lass sein, was ist



Du bist frei



Sprich sofort an,  
wenn dich etwas stört



Rede mit anderen,  
nicht über andere



Sei achtsam,  
aber nicht vorsichtig



Übernimm Verantwortung  
für dein Umfeld



Sei sorgsam mit  
der Gruppenzeit



Schaffe mit uns einen  
geschützten Erlebnisraum



Teile Fotos und  
Infos mit Bedacht



# 10. Clarify expectations, find shared agreements

You can remove a huge amount of insecurity from your participants by making explicit what you expect from them, as well as what they can expect from you and from one another; discuss etiquette and boundaries. Crossing those limits then is a conscious choice and not something that happens by accident.

Depending on a number of factors including the setting, intensity of the time spent together, group culture, and the degree of involvement you wish from your participants, you can either propose a fixed set of expectations or develop shared participation agreements with the group in a co-creative process.



# 11. Invite Consent

Give your participants the opportunity to learn voluntarily. When introducing an exercise, it is useful to give the instructions in the form of an invitation. Then ask the two questions: Is it clear what I am inviting you to do? Do you want to do it? Make sure you can accept a NO, otherwise it was not an invitation but an expectation.

If someone says NO and the reason sounds good to you and to at least some of the other participants, this may be an opportunity to re-think. Perhaps call a 10-minute mini-break and invite those saying ,no' to join you to talk about alternatives. The habit of inviting consent ensures that you deal with doubt, hesitation, and resistance in a very transparent way, and makes sure that a YES is really a yes and you can dive into the exercise with full confidence.

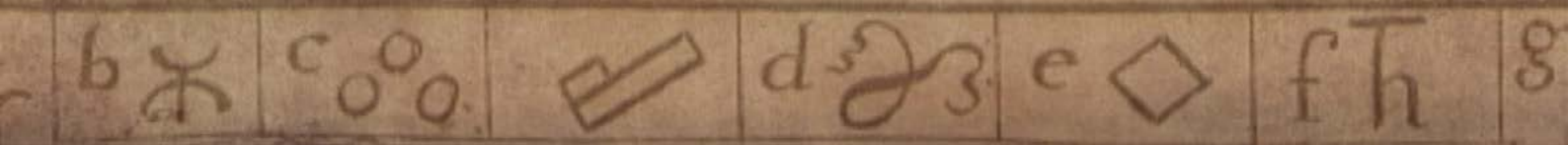
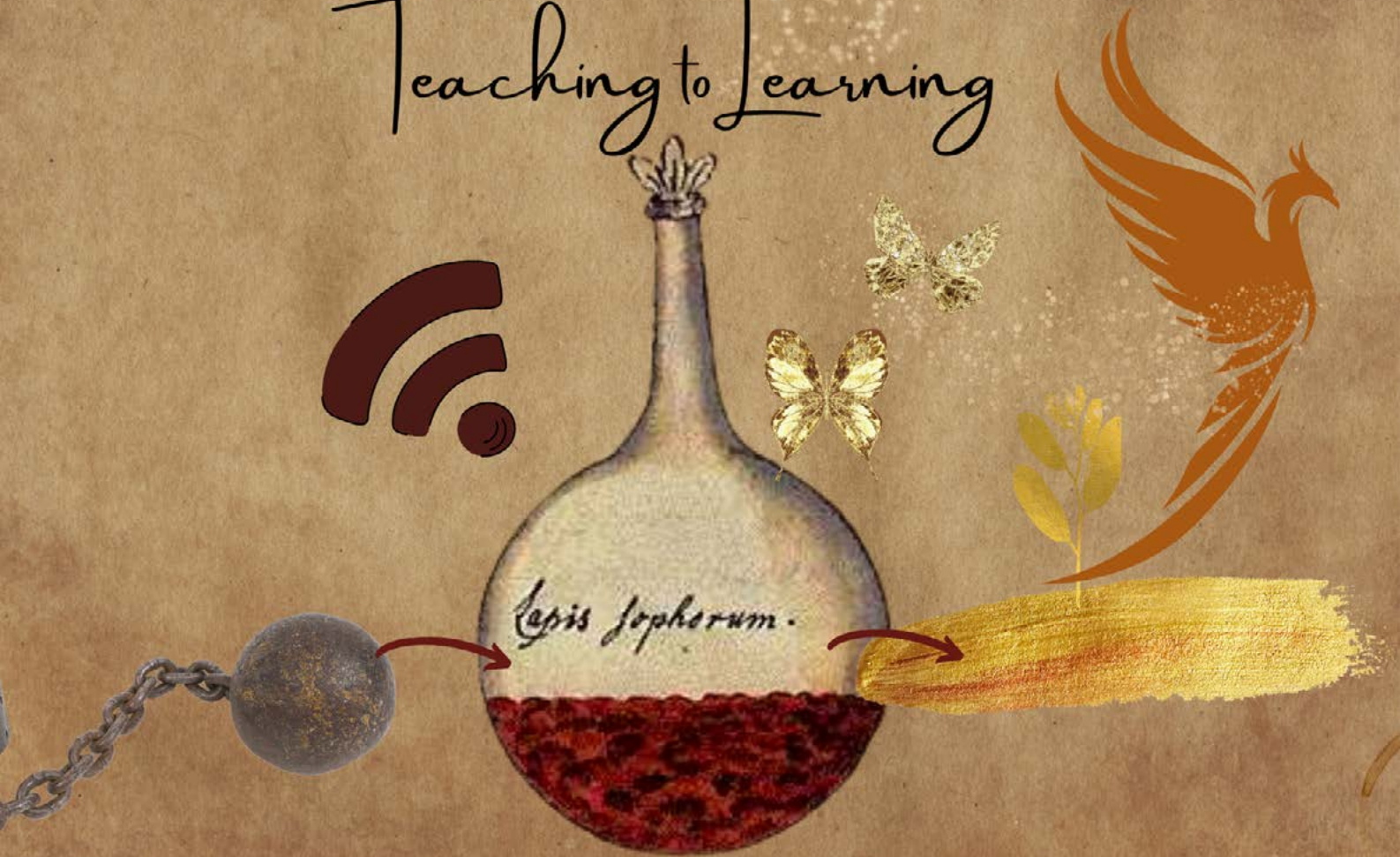


## 12. Practice attentive listening

Establish a culture of attentiveness so that everyone can be seen and heard, also participants with softer voices and more reserved ways. An easy way to do that is to introduce one or more listening techniques and exercises. You can combine listening exercises with topics you in any case want to discuss, so it is just adding an extra layer of awareness to your regular topics.

ONLINE ALCHEMY -  
HOW TO BOOST TRANSFORMATIVE LEARNING

# Shifting the Emphasis from Teaching to Learning





# Shifting the Emphasis from Teaching to Learning

Author: Marilyn Mehlmann

Two questions formulated during the Online Transformative Learning project both point towards a critical shift in educational philosophy.

## Question 1.

How to handle students who insist on being 'taught' and resist attempts to instead enable self-directed learning?

## Question 2.

How to turn a program designed for knowledge transfer into a transformative experience:

- Is it possible to do that?
- If so, is it different when the program is online? What type of online facilitation is required?

Summary conclusions to question 2: yes it is indeed possible, and no, we could in this respect discern no significant difference between online and offline.

Both questions assume a transformed world where the main task of a facilitator or educator is not to teach, but to enable learning—transformative learning; and the task of the participant or student is not merely to imbibe predefined knowledge but to formulate questions and search for answers.



PHOTO: ZORAN KOKANOVIC

# 1. Facilitation skills on an ethical basis

Consider the ethics of the situation. In the case of psychotherapy or of a program for personal development, there is no question that each participant has so to speak signed on for transformation. In any other situation - for instance a credits-carrying university course or a program that appears to be about knowledge transfer - there is a need to pay careful attention to the willingness of participants to be 'transformed'.

This mindset sets the scene for the following reflections and tips on how to be the kind of facilitator who enables learning.



PHOTO: CARL JORGENSEN

## 2. Why isn't knowledge transfer itself transformative?

There can be a direct path to transformative learning by knowledge transfer, if a body of knowledge is sufficiently extraordinary - and disturbing - to cause individual participants to start questioning what they thought they knew; and if they accept it rather than rejecting it.

However, it's important to distinguish between knowledge on the one hand and insight and understanding on the other. There is a border between knowledge and understanding, or insight, and crossing it enhances action competence and thus brings transformation closer.

*Knowledge leads to debate,  
understanding leads to action.*

KURT LARSSON



PHOTO: ENGUERRAND BLANCHY

### 3. Understanding through action

The border crossing from knowledge to understanding is often helped by experience: preferably the direct experience of the participant, for instance in carrying out an assignment. Strong evidence of the experience of (trusted) others can also do the trick.

This runs contrary to the conventional wisdom that knowledge leads to action, which in turn may lead to a changed (or transformed) mindset. In practice, the reverse is often true: experimental action opens the mind to frame new questions and seek new answers. Designing judicious experimental action into a program can trigger cascading results.



54013

PLEASE  
Keep Feet  
& Arms  
Inside

PLEASE  
Keep Feet  
& Arms  
Inside

MATA

WATCH YOUR STEP

PHOTO: JOSHUA J. COTTEN



## 4. Be clear about your own values and ambitions

Do you have transformative ambitions on behalf of your participants? Do you believe that they will benefit from a transformative experience? Do you perhaps believe that the world needs more people on a journey of transformation, for instance in order to meet sustainability or climate goals?

That's fine. And, acknowledge that the participant needs to be in the driver's seat. Above all, don't measure the success of your facilitation on the basis of 'achieved transformation'. You may sow seeds that germinate only after a year, or a decade. Or, your wisdom may never root. Your generosity of spirit allows each participant to live out their own values and ambitions, both now and in the future.



PHOTO: LEIO MCLAREN

## 5. Pull, don't push

If your ambition is to enable transformative learning, you need to enable each participant to approach what is sometimes called 'the growing edge of the comfort zone'. If you try to push them, for instance by insisting that they should take part in certain exercises, there is a risk of pushing them over the edge and into a distinctly 'discomfort zone' - see also "Safe Enough Space".

This is not only unethical but counter-productive: in that discomfort zone, the negative edge emotions (see separate article) tend to dominate, leading to inability to take action, with a risk of cementing 'old' beliefs or habits.

Instead, formulate each step as an invitation. Consider: if a participant says 'no thank you' and you find that you feel confused, unhappy or even angry, then it wasn't a true invitation.



PHOTO: DANIELLE CERULLO

## 6. Handling 'no'

What do you do when a participant refuses your invitation? The first step is to be prepared, practically as well as mentally and emotionally.

### **Practical**

What alternatives can you offer? You may have a similar but less challenging version of the proposed work. If many or most participants are saying 'no', it may be time to switch to the 'lesser' version. If only one or a few are negative, ask them to stay with you in plenary while the others move to breakout rooms, and then explore with them what kind of activity might suit them better - which might include taking a break for the duration of the exercise.

### **Mental/emotional**

This is really a question of how attached you are to the importance of your own role as educator or facilitator. Can you let go of the idea that you need to be the one who knows best what is best for participants? Can you countenance that in any given moment, each person is doing the best that they can - even if it doesn't match your ambitions?



PHOTO: DUY PHAM

## 7. Enabling peer support

A powerful facilitation tool is to create the conditions for participants to support each other. This may include exercises in methods that enable them to support each other effectively, as well as trust-building measures to ensure that the support is given and received positively. Inviting participants to select their own support groups can be an important trust-promoting step.

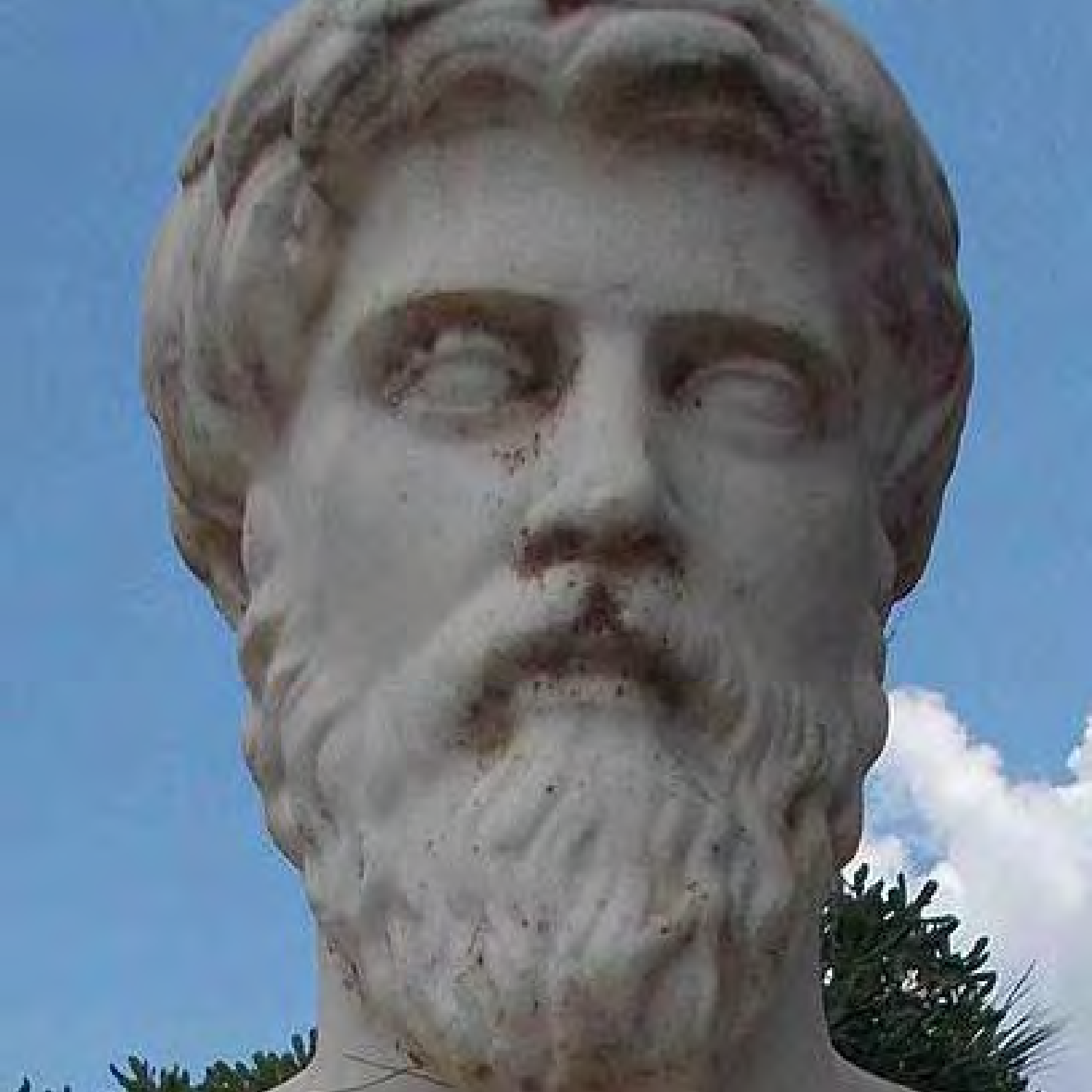


PHOTO: BRANDON MORGAN



## 8. This is SO different from what I learned about teaching!

Traditional teacher training is indeed mostly focused on knowledge transfer, to the detriment of opportunities for transformative learning. But the very fact that both science and education continue to evolve indicates that this limitation is not being observed: we often learn more than the teacher suspects!



## 9. Isn't this just what the ancient Greeks always said?

*"The mind is not a vessel to be filled but a fire to be kindled."*

PLUTARCH

*"Educating the mind without educating the heart is no education at all."*

ARISTOTLE

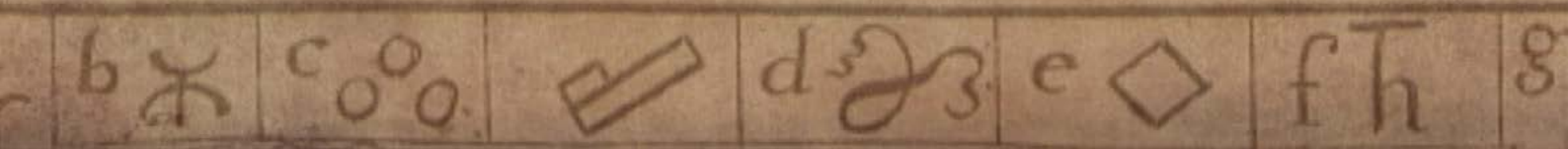
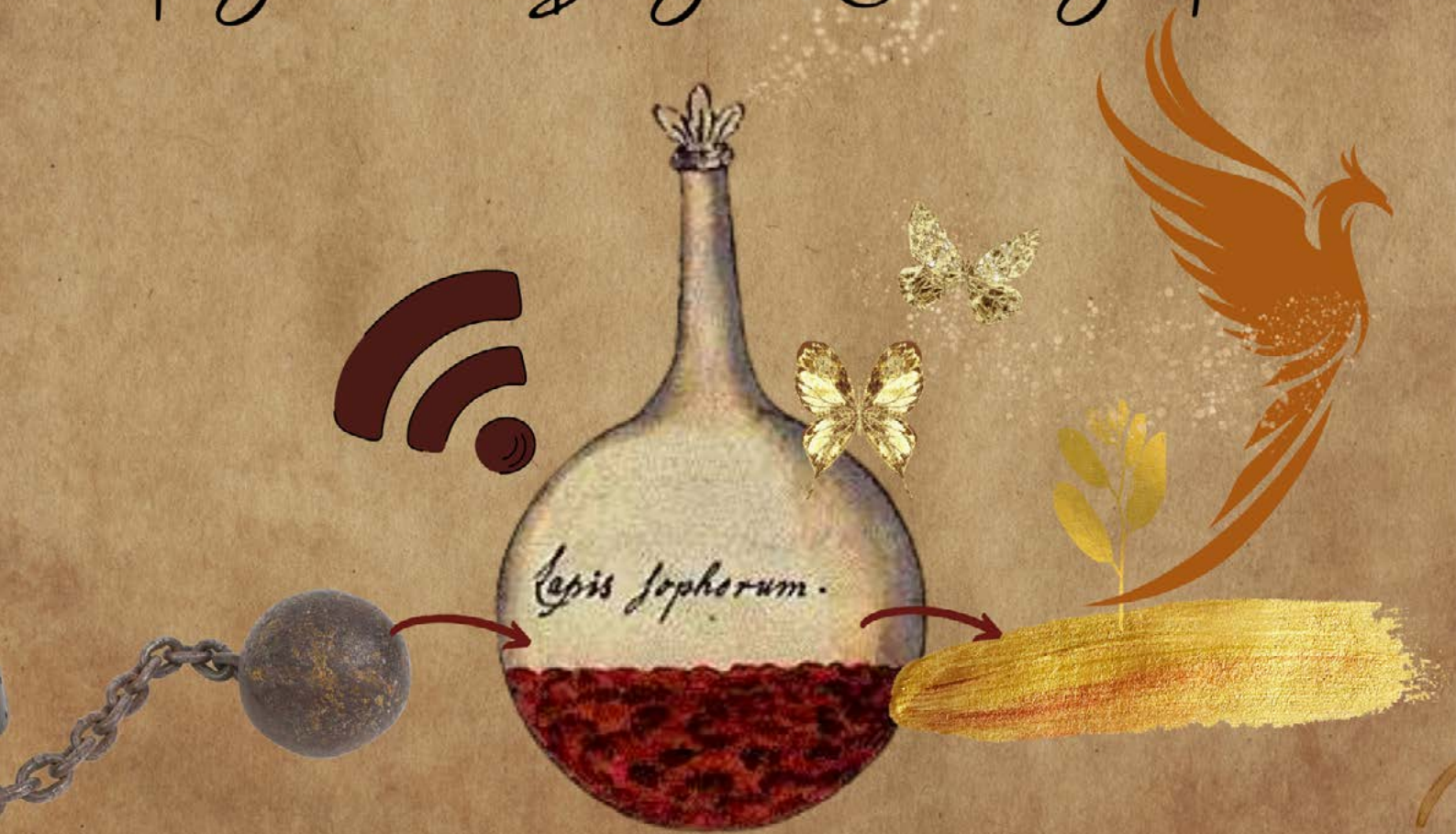
Yes indeed. We'd like to rephrase them:

*"The student is not a vessel to be filled nor a fire to be kindled, but a unique human spirit to cherish."*

DADA SHAMBHUSHIVAN ANDA

ONLINE ALCHEMY -  
HOW TO BOOST TRANSFORMATIVE LEARNING

Programme Design: Creating Flow



# Program design: Creating flow

Author: Marilyn Mehlmann

Here are some of the things we have learnt about designing online curriculum with transformative learning in mind. The points made are derived from experience in formal, non-formal, and informal education.



PHOTO: SERGEI ZHUKOV

# 1. Using a standard structure

You may have a general course structure, for instance based on a methodology like Theory U or Learning for Change, that works well offline. It will probably work equally well online, though you may need to adjust the format of specific methods for exercises.

Stay Safe



21319

PHOTO: NICK FEWINGS



## 2. Futures

To facilitate transformative learning, consider including (if you don't already) futures-oriented exercises. Such exercises can significantly broaden perspectives, not least concerning values and visions; working with desired futures can bypass assumptions about what is likely or possible, and open for creativity and indeed transformative learning.

*Being futures literate means being able to distinguish different kinds of future. Being futures literate means that you know where your images of the future come from - the sources of what you imagine. And, crucially, you understand the power such images have on what you see and do, your fears and hopes, motivations and emotions.*

RIEL MILLER, UNESCO FUTURES



PHOTO: LUKE ELLIS-CRAVEN

### 3. How much structure?

Expect to develop more detailed plans than for an offline course. This is partly because the scope for the facilitator to improvise is somewhat narrower, and also because working online presents both a need and an opportunity to design a course in smaller segments - see the next point.

Structure is an element in creating trust; the participants need to feel confident that the course is well designed and managed.

Structure also creates confidence for the facilitator, whether that person is you or someone else. Still, there is a need for balance at the point of delivery: the facilitator equally needs to feel confident in deviating from the detailed plans when necessary - when over-much structure could impede creativity and disable transformative learning.

In short: maximum structure while planning, for optimal flexibility when delivering.

Mon

Tue

Wed

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## 4. Time!

A major opportunity with online courses is the option to extend them over time, with shorter sessions at possibly shorter intervals, since there are none of the costs associated with bringing people together in person. This can noticeably increase the impact: for instance, a half-day once a week for two months is more likely to yield long-term effects than a single continuous four-day session.

Extended courses not only give the benefit of continuity over time but also make it easier to obey the general rule of varying the pace and format of sessions. Exercises can be presented in smaller segments, break-out groups of 10 or 15 minutes can be highly productive; and such elements as lectures or videos can be made available offline for access whenever is easiest for the participants.



PHOTO: CHRIS MONTGOMERY

## 5. The alchemy of relationships

In the article 'Edge Emotions' we claim that fostering relationships is critical to the alchemical process. Positive personal relationships are integral to transformative learning. Program design should provide many opportunities for both formal and informal communications between facilitator and participants, and between the participants themselves.



PHOTO: BROOKE LARK



## 6. Enable integration

On the path to transformative learning, an important aspect is action and action competence. An educational program that allows and encourages real-life action and experimentation is most likely to have long-term, even measurable effects, as the learning is integrated into participants' real-life experience.

Working online, such opportunities are relatively easy and cheap to bring about.

- In the course of a single online session, participants can be encouraged to use their home environment, rather than a 'neutral' classroom.
- When the program takes place over two or more sessions, participants can be invited or requested to carry out real-life experiments between sessions. This enables not only invaluable hands-on experience to bring back to the classroom, but also, if consistently repeated, contributes to building new habits.



PHOTO: DANIEL K CHEUNG

## 7. Choosing methods

Whether online or off-line, there is a temptation for educators/facilitators to take the line of least resistance and stick to conventional approaches such as lectures and seminars. But there is a wealth of experience showing that less conventional methods can open new opportunities for transformative learning, including for instance polling, gamification, role play, and storytelling.

All these methods can be used or adapted online, where there is even an additional advantage in the form of access to the participants' own environments as a source of inspiration and materials.



PHOTO: KRAKENIMAGES

## 8. Don't forget the body!

On the one hand, intensive online presence is bad for the body: fixed posture becomes a serious issue, and there is no travel to and from a venue, or even walking to and from break-out rooms, to enforce physical movement during the day. On the other hand, working from home opens up new opportunities. Participants - and not only the facilitator - can generally choose to stand up, walk about - even take a walk outside, without jeopardizing their participation.

Much depends on program design.

- Make sure that sessions are short enough to break poor posture habits (some propose max 75 minutes without a break).
- Open a break with a simple stretching exercise.
- Include sessions where access to a smartphone is adequate, no need for a computer.
- If possible, include elements that presuppose movement: eg finding a specific object in the home, or in the street.
- Consider including in the program actual physical activities, for instance a physiotherapeutic movement, self-massage, or a dance. Participants can choose to do the exercises off-screen.

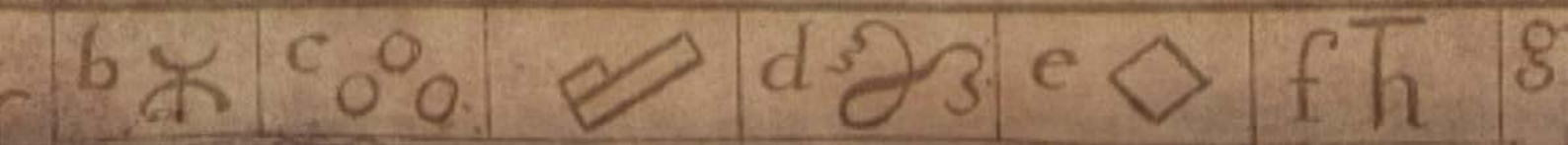


## 9. Transparency

There is a balance between offering too much and too little information, inviting too little or too much participation in program design or revision; and indeed between satisfying the needs of the ultra-curious as well as the 'just tell me what to do' ends of the spectrum. A general tip is to offer only an outline of the program to participants, but to have detailed information on hand, to be offered only in response to an appropriate question.

ONLINE ALCHEMY -  
HOW TO BOOST TRANSFORMATIVE LEARNING

Facilitation: Dealing with Edge Emotions





# Facilitation: Dealing with 'edge emotions'

or  
How can I handle  
the emotions aroused by transformation?

Author: Marilyn Mehlmann

Approaching transformative learning inevitably arouses emotions. They can be positive: curiosity, excitement, creativity, critical reflection. Or negative: 'paralysis', fear, stress, even panic.

The quality of the emotions depends very much on whether and how trust has been established (see "Safe Enough Space"), not least between participant and facilitator. With a solid foundation in trust, with the creation of a 'safe enough' space, the positive emotions can arise and be fostered. When the space is experienced as unsafe, the negative emotions may dominate and, if not adequately handled by the facilitator, may lead participants to lose confidence or even panic and abandon the learning process.

STATE A  
"stable"  
comfort

the "up-to-now":  
old meaning,  
perspective and being

EDGE EMOTIONS: LEARNING EDGE

*taking the risk:  
moving out of the  
comfort zone*

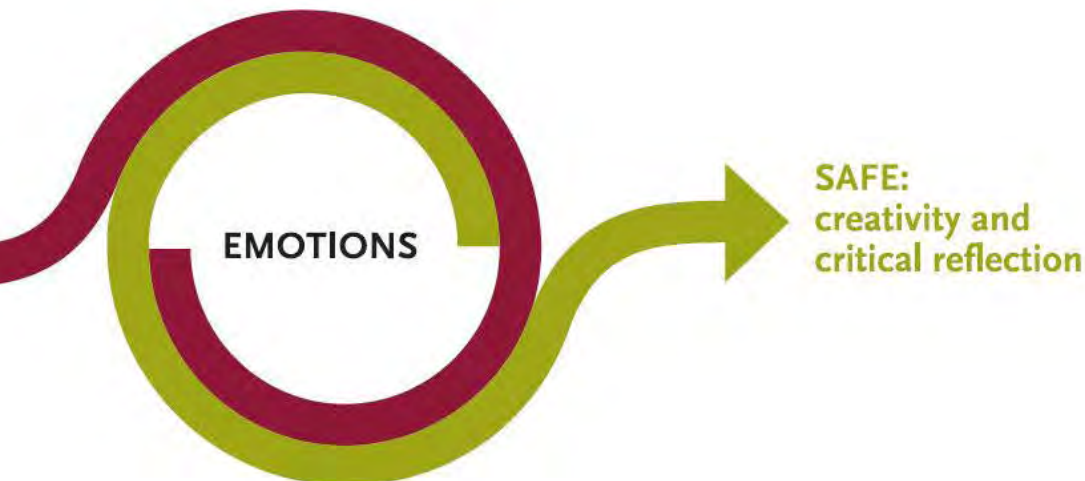
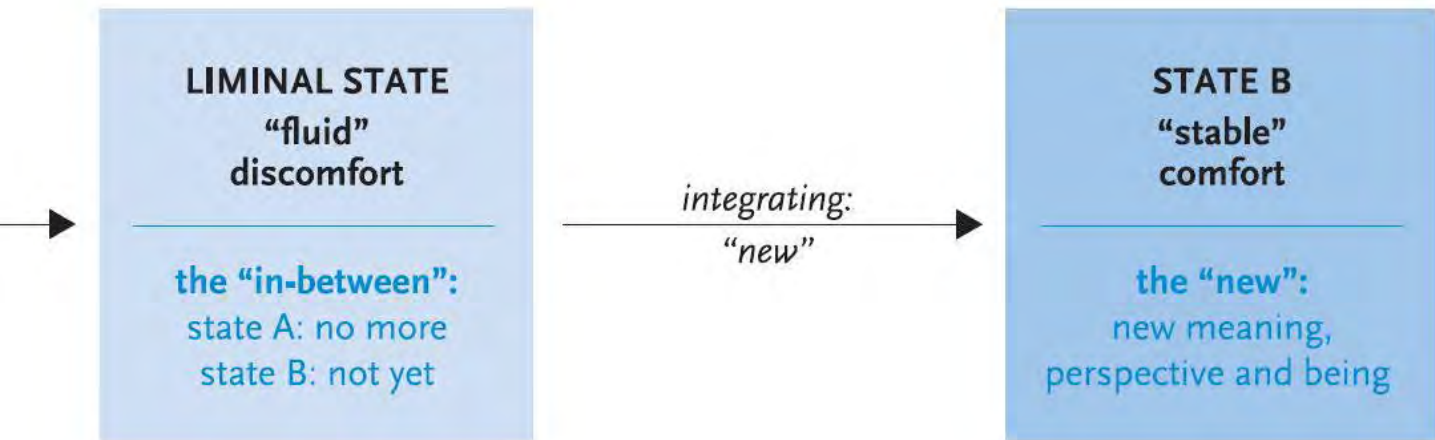
TRIGGER

**THREATENING:**  
fear, panic  
automated  
stress reaction  
(fight/flight)

# 1. 'One man's ceiling is another man's floor'

There is no single recipe for successful transition and transformation. Stay attuned to the signals of comfort or discomfort from

each participant; and accept that it may not be possible to bring everyone in a group along at the same pace.





## 2. What are my own success criteria?

What are your own expectations about the transformative quality of your teaching?

Transformative learning can be a desirable outcome in many types of education... but shouldn't be an explicit 'learning objective' except in programs specifically designed and announced for that purpose. What we can do as educators is 'only' to create enabling conditions - for example, a sufficiently safe space for positive emotions to emerge.

Transformation happens in its own time, maybe several years down the road. If you set it up as a criterion for your own success as an educator, you may find yourself making unreasonable demands of your participants.



PHOTO: NIJWAM SWARGIARY

### 3. It's not about you

Expression of criticism may be a sign of negative edge emotions: criticism of the course content, of the working methods, of you as facilitator. If the criticism seems unfounded or even irrational, consider the possibility that it's a symptom of fear of the novel, unknown.

The key is to avoid getting mired in a discussion: distance yourself from it ('It's not about you'), affirm the feelings behind the criticism, ask questions and above all listen. Some examples:

- 'I understand you feel that the course is too rigid / not sufficiently well structured. What might we do differently, in your opinion?'
- 'I hear you're not convinced that the facts presented here are correct. What is your main concern?'
- 'I can hear you'd prefer me to be more / less directive. If most of the group feels the same, I'll do my best to give more detailed / more flexible instructions. If not, let's talk about how you and I can work better together.'

In each of the examples the ambition is to make the participant feel seen, heard, and validated, thus contributing to expanding the safe-enough space and shifting the edge emotions in a positive direction.



PHOTO: ZULMAURY SAAVEDRA



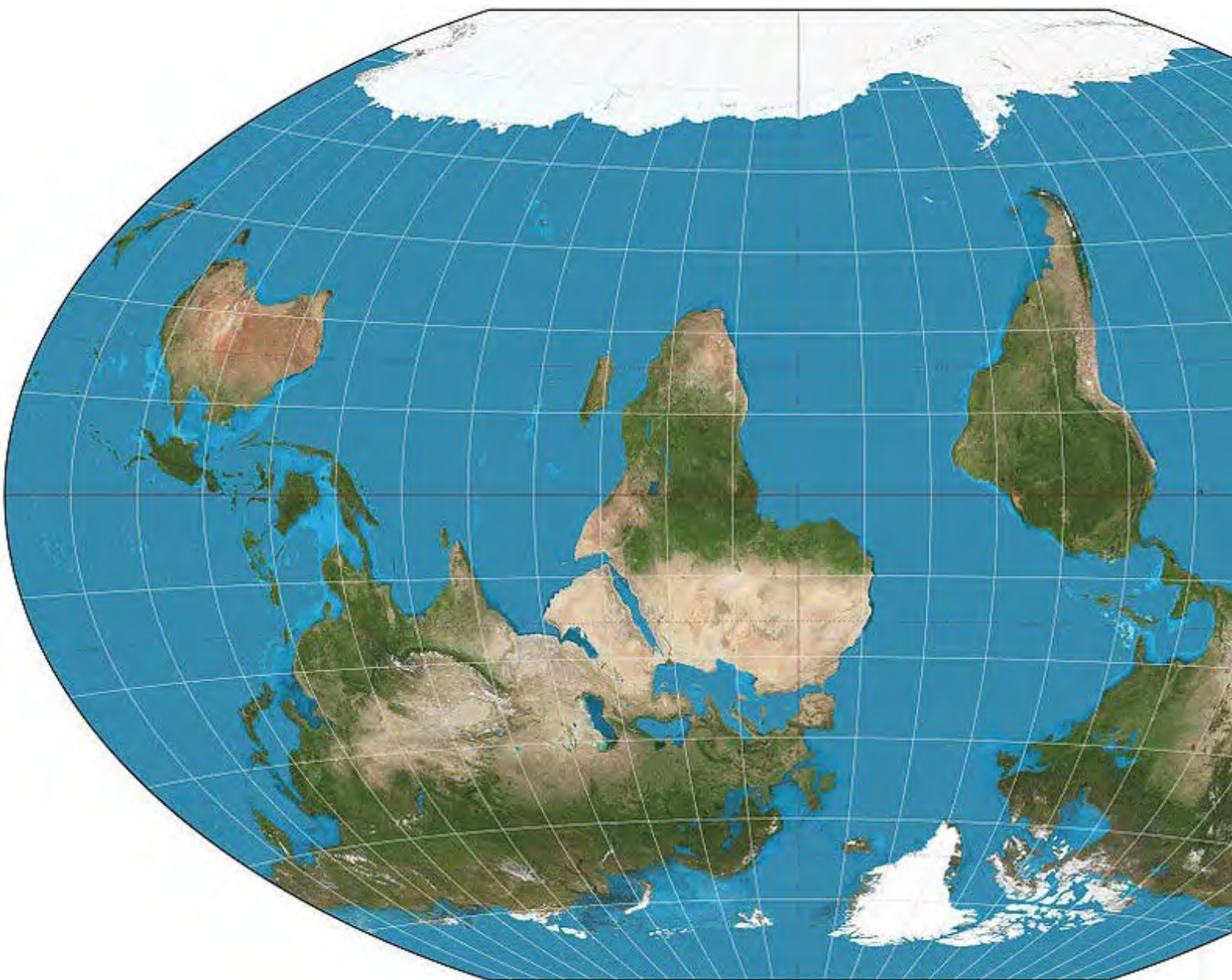
## 4. What signals help me to 'feel' the group, online?

Body language says a lot about how participants feel. In an online environment it can be useful to agree about how much of the body each person shows on screen. Does the camera capture only the head, or is for example all or most of the torso visible?

Beyond that, some useful signals indicating lack of engagement are

- Frequent shutting down of video
- Lack of response to calls for simple input via chat
- Absence from or passivity around such tools as online whiteboard
- Lack of interaction in a break-out room

Any of these may indicate either boredom, exhaustion, or the onset of edge emotions; while the opposite signals indicate engagement.



# 5. How to push without pushing

An educational program can be designed to bypass the 'rational' brain and trigger a shift into an enabling zone. Triggers documented in the OnTL project include

- Play and gamification
  - Role play
  - Introduction of unsettling, well-documented facts
    - A new perspective on known facts, for instance gender-based autobiography
    - Exposure to different world-views among students

Triggers are most effective when the atmosphere in the group is welcoming and accepting, and when participants are eager or willing to learn. Triggers can also be used when signals from participants

are negative, to counteract the negativity, though this calls for greater facilitation skills. In either case it's important to be clear that the situation is invitational: it's quite acceptable to say 'no'.

It may also be the case that other factors in the life of a participant are constraining the safe space, or indeed making it virtually impossible for him/her to contemplate initiating any life change. It's important to show respect for the individual situation, for instance by affirming that 'no change' is also a valid option.



PHOTO: MARCUS WOODBRIDGE

## 6. Values and visions on the edge

Enabling edge emotions to emerge and giving participants opportunities to acknowledge and reflect on them makes it possible for participants to access otherwise tacit values, as well as assumptions about the future. Bringing emotions out, articulating values and accessing visions, can be foundational for transformative learning. There are many methods to help with this; the main thing is to maintain respect for each learner's own exploration rather than trying to impose external values or visions.

*“Arguably THE central intervention of the whole workshop was that we invited each and every participant to share a personal story about a situation that had impressed them with considerable impact, and if possible to describe the values that were reflected in the situation and in the learning they took away from it.”*

Working with participants' values is one way, together with Critical Thinking, to keep their learning on a transformative path. A key is to ask not only what is valued, but also how much of it. It's possible to have too much of a good thing. One of the most powerful triggers can be found at that particular edge. For instance if honesty is valued, when and how might it be 'too much'?

When working with visions, a key is to remember that each one of us carries within

us at least three images of the future: what we hope will happen, what we fear may happen, what we expect to happen. Transformative learning can most easily take place when there is a reasonable balance between the hopes and the fears.



PHOTO: SARAH KILIAN

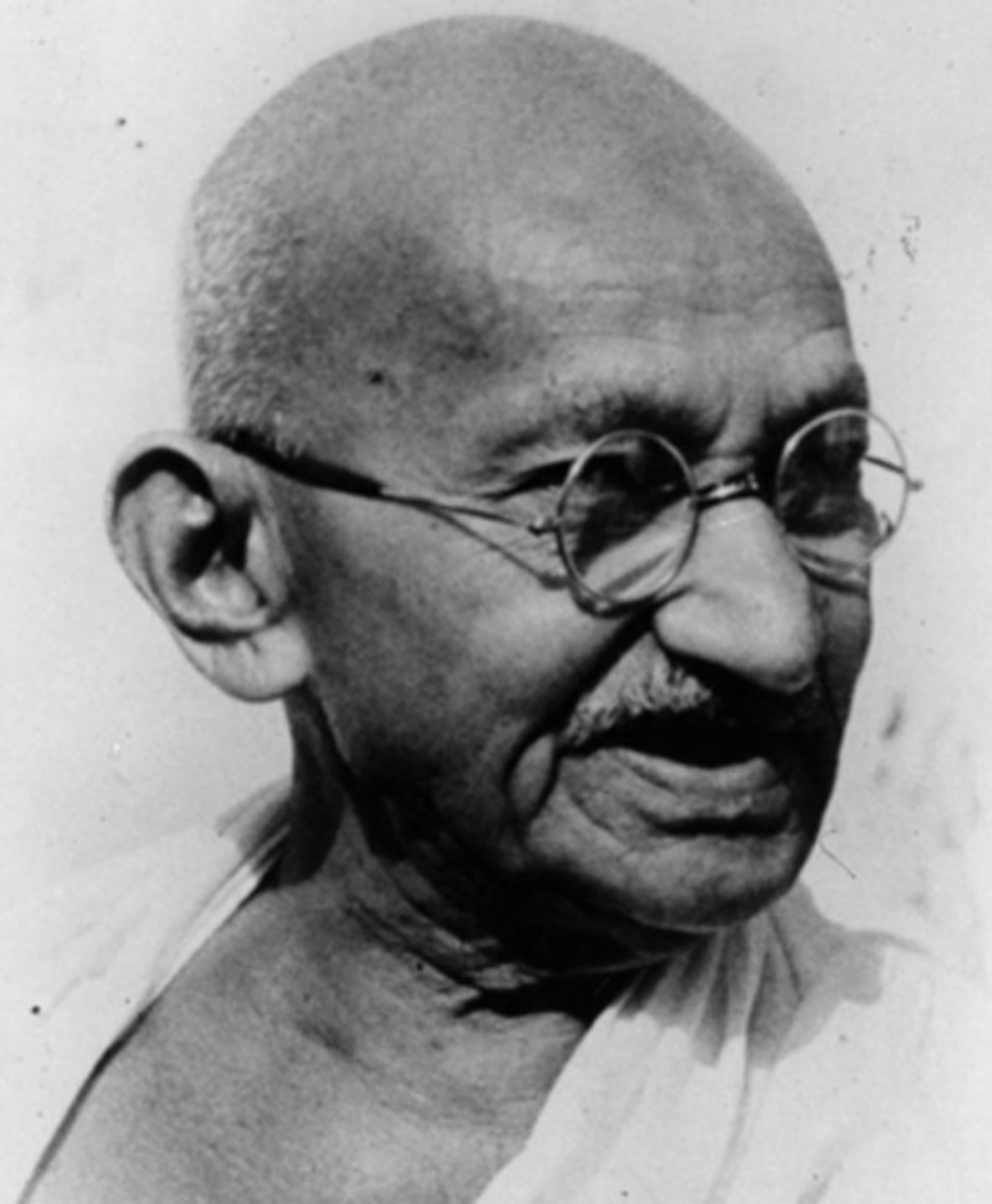
# 7. Using failure to boost transformation

Sooner or later you will experience major or minor failures - even more likely in an on-line setting, when the technology offers so many opportunities for malfunction.

In that moment, a lot hinges on your ability as facilitator to improvise: to change the program without losing sight of your objectives.

- Plan in great detail, also for contingencies, but announce to participants only an outline of your plans.
- Make major contingency re-planning explicit and transparent so that you and participants can view the process from a metalevel and they can contribute to decisions. Example: "We could do this now, and then we would need to take out either x or y tomorrow".

After the event, analyze what you could have done differently. Consider sharing your insights with participants.





## 8. Be the change

Don't be afraid to share your own emotions with participants. Not in order to make them 'responsible' if you feel confused or anxious; but as a role model, sharing emotions and linking them to a transformative process - your own.



PHOTO: MAJESTIC LUKAS

## 9. How to live on the edge

Getting to your own edge means creating situations that are 'safe enough'. You can for instance design a program to include a method, process, or use of technology that is (from your perspective) experimental, rather than sticking with what you usually do.

Living on the edge means managing your emotions so that the positive ones have a chance to dominate (most of the time). When you encounter the negative ones, like fear or stress, it can help to name them. First for yourself, then maybe for your participants (see point 8).



PHOTO: BALL PARK BRAND

# 10. Fostering relationships

A critical point in the alchemical process is enabling and fostering personal relationships between facilitator and participants, and between the participants themselves, in ways that not only engender trust but also enhance willingness to share emotions and expose vulnerability. In an online environment, facilitators' apparently small decisions can be decisive. For instance,

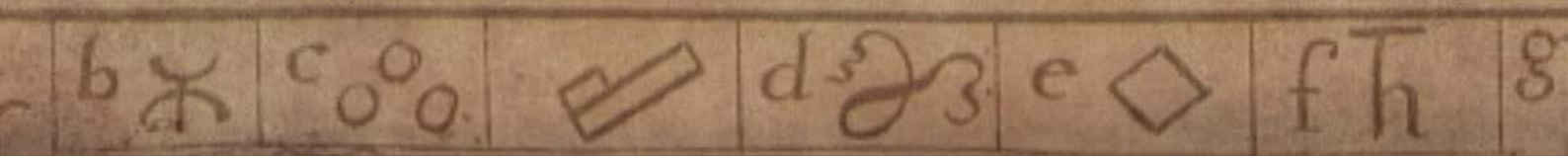
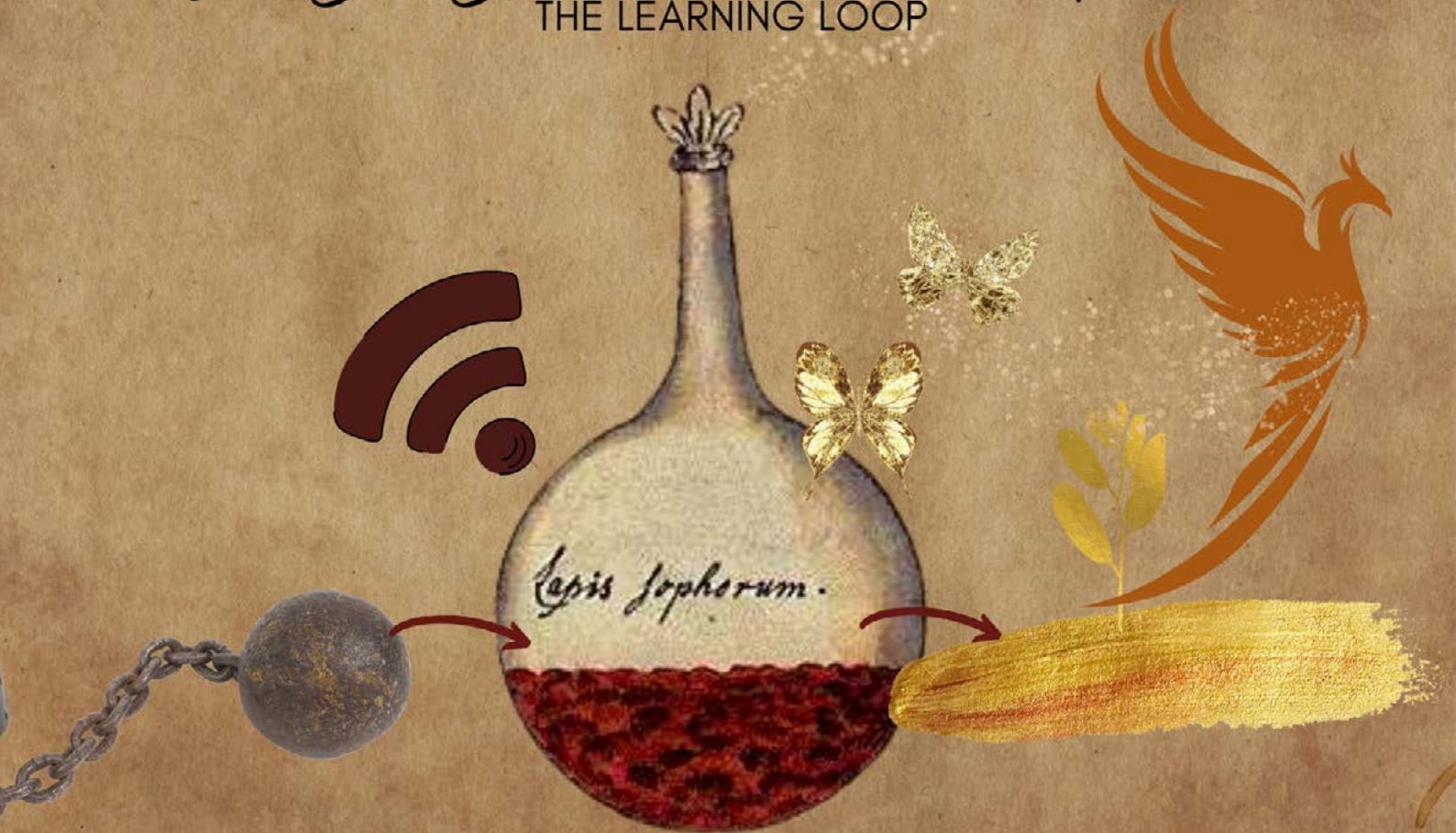
- Occasional use of an online polling system, with judicious formulation of questions, to create a word cloud can make visible the feelings, hopes and fears of the group without individual exposure, and is even more effective online than offline
- Short, small break-out groups (2-3 people for 3-5 minutes) can replace online the offline practice of inviting pairs or trios to 'buzz' in a plenary
- Open break-out group rooms can enable participants to move around, and to seek out the people with whom they feel most comfortable, when this could be an issue.
- Provision of a 'mingle' software platform at times when participants would normally simply chat (for example, a Wonder site before, after, or during longer breaks) can foster informal communications

Such practices are evolving, as facilitators experiment. Many now report excellent results.

ONLINE ALCHEMY-  
HOW TO BOOST TRANSFORMATIVE LEARNING

# Designing an Assessment Process

THE LEARNING LOOP



# Designing an Assessment Process: the learning loop

Authors: Anne B. Zimmermann and Elisabeth Hofmann

“Have participants learned their lesson?” This is unlikely to be the right question to ask in a transformative learning context. But as facilitators of transformative learning (or whatever we are called in our specific settings: educators, trainers, teachers, lecturers, etc.), we do want to know whether a learning event has had an impact – and in particular whether it has had the impact we designed it for.

When we want learning to be transformative, the “lessons” we design for participants focus less on transmitting specific knowledge and skills from teacher to learner. So the proof that learning has taken place is *not* in the reproduction by the learner of the contents and skills transmitted by the teacher.

In transformative learning, the teacher or trainer is above all a facilitator of the process of transformation in which the learners choose to engage. If successful, a transformative learning event leads learners to participate consciously in the learning process. Such a process is guided and coached by an experienced and empathetic facilitator who has a maieutic function, and is strengthened by the support of co-learners.

So what is the overall outcome of a transformative learning event? Learners gain autonomy for the learning process. They dare to expose themselves to unsettling experiences and deep insights that emerge during the learning process and change their way of perceiving the world. They are supported by and support co-learners. They feel safe in a space held by the facilitator. They look back at what happened and assess their progress. And they may, with time, change their behaviour and their professional practice, based on their learning.

**So the lesson is learning** – an endless and intricate loop: learning to learn.

Transformative teaching is a complex endeavour and the facilitators themselves are also constantly learning, and aim to improve their teaching. Assessment can therefore go beyond assessing the learning impact and also focus on the quality of the transformative teaching provided to the learners.



PHOTO: TIM GRAF



# 1. Clarity about the purpose of assessment

Since there is a conscious decision and plan in designing a learning event, it is appropriate for educators to ask themselves whether what they designed actually worked and whether they can improve the design. The purpose of assessment in this case is improving the *quality and effectiveness of transformative teaching*.

Another purpose may be the need to provide learners with a *certificate*: will it merely be a certificate of attendance or completion of the course? Or is there a need to define learning outcomes clearly, with a scale showing how well a learner did? If so, who decides on the learning outcomes and the scale? What precisely does the certificate certify?

In transformative learning, a further purpose of assessment is to contribute to learning to learn, as well as to boost and consolidate the expected (or unexpected) *transformation*.



## 2. Assessment as part of transformative learning

In transformative learning, assessment is an essential part of the learning process, especially self-assessment: self-assessment implies self-reflexivity on the learning journey. It encourages learners to take a step back, to gain a critical distance with regard to their own insights and perspective, in order to understand whether and how they changed.

Self-assessment helps empower learners. Becoming conscious of the change process and able to make it explicit is a central phase of consolidating learning. Self-assessment also increases self-esteem.

Self-assessment and peer assessment – performed as reflection, not judgement – can also act as a catalyst for transformation. When shared, assessment increases learners' capacity to multiply learning for transformation.

concertation / Décision  
complémentation...

organisation

co-construction  
co-construction

l'organisation de  
la table (dispositif  
de table...)

le rôle de / des  
animateurs



Animation

la participation  
simple et accessible

implication des  
bénéficiaires formés  
dans le projet

Synthèse  
des  
idées

impliquer tout le monde.

Implication/participation

Diagram showing stick figures interacting.

### 3. What can be assessed?

Defining concrete learning outcomes for a transformative learning event may be difficult: one of the characteristics of the transformative learning process is unpredictability. Nevertheless, trainers have a duty to announce what the event's aims are; they can also explain that outcomes can be measured from this perspective and beyond.

While each event will be different and will require a specific assessment procedure, some general questions concerning the learning process are worth asking during and after each event:

- How is the learning process working?/  
How did the learning process work?
- What aspects are triggering/triggered learning?
- How do/did attendees feel?
- Do/did they feel at ease with self-observation?
- Are attendees learning from each other/  
Did the attendees learn from each other?

In addition, it is always essential to know whether the learning process has/had an impact on (meaning) perspectives and values:

- What is changing?/What changed?

Areas of impact may be grouped into the following metrics:

1. Enhanced self-knowledge
2. Enhanced social competence
3. Enhanced action competence
4. Enhanced openness to/tolerance for uncertainty

Finally, the question of societal impact is important, especially from a sustainable development perspective: did the transformation triggered by the learning process have any impact on the learners' behaviour and practice? And did these changes contribute to making organisations, communities, and societies more sustainable?

## What do you want to assess?

Enhanced self-knowledge

Enhanced social competences

Enhanced action competence

Enhanced tolerance for uncertainty

Involvement in process

Impact of transformative learning

Satisfaction and feelings

...

## What is the purpose of assessment?

Enhanced learning

Improved online facilitation

Accountability

Dissemination

Contribution to societal transformation

...

## With or for whom?

Learners

Facilitators

Institutions (certification!)

"Outsiders" (funders, disseminators, ...)

Society

...

## How?

Self-assessment

Peer assessment

Collective assessment

Observation

Co-constructed assessment

...

...

# 4. Designing a procedure

To organise an assessment, we can ask ourselves three questions before we actually design it:

- What do we want to assess?
- What is the purpose of the assessment?
- With or for whom is the assessment?

And only then should we think about the “How?”

Under these headings, the main concern in deciding about an assessment method and procedure should be coherence between the four sets of elements (dark blue boxes shown in the figure: object, purpose, stakeholders involved, and mode of assessment) chosen in the four columns. The arrows in the figure show two examples of possible paths for designing an assessment procedure.

Once we have answered the questions involved in these four dimensions, a fifth question needs to be addressed: when is the best moment to assess? Should we organise a one-time assessment, or regular assessment points, or recommend an on-going assessment (e.g. a journal to be filled all along the learning journey, or a growing mindmap)? Assessment can be done at different stages of the learning process: final assessment, regular assessment (to capture the learning journey), and comparative pre- and post-measuring. As we seek

to strike a constructive balance between learning and assessing, we are also faced with the question: how much assessment do we need/want?

There are no obvious answers to these questions, they also vary according to context, available time, type of learners, number of learners and facilitators, etc. We should take the options that “feel right” in a given setting, be creative when designing assessment, and try out a combination of tools. We can also co-create assessment design with learners – the possibilities are endless.

# What gives you hope for radical change?





## 5. Thinking about the “how”

In addition to assessment of learners conducted only by facilitators, self assessment and peer assessment are interesting options. Assessment can be an individual task (e.g. questionnaires/surveys after a completed course) or a collective task: for instance generating word clouds through an on-line poll (as in the illustration) with the answers to a question that all participants respond to at the beginning and at the end of the event.

Other examples of forms of assessment – for most of which online solutions exist:

- Mid-term and end-of-the-year interview with each learner (this can be done by the facilitator, but it can also be done by a peer).
- Self assessment, self reflection; this can be used either only at the end, or at both the beginning and the end, or several times throughout the learning event. Examples: use photolanguage (online versions are available) or the creation of a personal drawing or collage (that can be modified as the learning proceeds; or simply ask learners to represent their perception of their learning journey). These personal representations can be created offline (on paper or using other physical means) and shown and discussed online.
- Peer reflection, peer assessment (preferably in smaller groups in breakout rooms)
- Direct questions during the last meeting; shared reflections in closing ceremonies
- Discussions, quizzes, regular mini conclusions of implemented practices
- Storytelling
- Recorded reflections (video, audio) instead of written assignments

Question 1

Adaptation à la crise

Travaux personnels : dans le cadre de la formation -

Partage d'expérience et travaux personnels

Partage des outils qui a permis de stabiliser les idées

Accompagnement individuel fourni par le F3E

Pour la suite : avoir des moments présentiels permettant

Question 2

A éviter !

Se lancer dans une expérimentation pas vraiment planifiée dans le

les plans d'action ou projet en cours

Question 3

à renforcer et/ou améliorer ?

Mieux équilibrer théorie et pratique

Davantage de séminaire ou de temps d'échange en arroue -> 2 fois

Meilleure fréquence des séminaires

Pérenniser l'accompagnement aux AOC dans l'offre de service

améliorer la disponibilité des ressources

Echanges pairs en présentiel

Question 4

nouveauté, création, invention ?

Visites terrain croisées entre expérimentations

Rencontres entre pairs, pour que celles et ceux qui sont plus en

Échanges pairs à pairs plus directes

Faire bénéficier d'autres acteurs au fil de l'eau

Atelier d'écriture sur la capitalisation

avance fasse bénéficier de leur expériences aux moins avancés

Comment associer davantage d'acteurs / de nouvelles asso

dans le groupe / (hors contractualisation projet)

Online whiteboards where individual learners put their reactions on stickers can be used, providing a collective picture of the assessment, which can be revisited later:

Questions should mainly be open questions, for example:

- How satisfied are you with the course/ event? What was satisfying or dissatisfying?
- What was difficult?
- How has this contributed to your personal learning journey?
- What have you taken away?
- What has changed inside and outside?
- What did you do differently?
- What changed because of your interaction with others beyond the learning event? Did your own attitude towards others change?
- What changes do you intend to introduce (in your professional setting and/ or in your private life) next week, in the next three months, in the medium term? (Ideally, asking such a question would require a follow-up session to discuss the changes that occurred or did not occur.)



PHOTO: ANNE ZIMMERMANN

## 6. Assessment by observations

Built into a program:

Facilitators sit in and observe small group reflections in breakout rooms.

Observations during check-ins, where participants are encouraged to brag, tell about ahas and oh nos.

Observation by a facilitator of a shift in the learners: e.g. how they start speaking up and speaking out. They may start asking important questions, asking questions differently, or begin to openly state their disagreement, make suggestions, etc.

Observations outside a program:

External observations at a workplace before and after. Example: A line manager who is a designated performance coach, in charge of following up changes and new behaviours in the participants.

Ask attendees to report on observations about colleagues, family members, friends.



# 7. How good is good enough?

As stated above, assessment is a central ingredient of transformation in itself, it can help improve the quality of transformative teaching and learning and it might be necessary for delivering a certificate. However, let's keep in mind that assessment is "only" a way of checking where and how the journey is going. The learning journey itself is the purpose, not its documentation or proof.

Pragmatism is essential:

- The purpose of assessment should guide what is being assessed and how, keeping in mind that parsimony is the aim. The right balance of assessment activities versus learning activities is central: assessment should not become the driving force. We have to be conscious of the risk that too much assessment is overwhelming for the learners, potentially hampering the learning process.
- The alchemy of transformative learning is complex and goes far beyond the causal reasoning that underpins assessment; transformative learning depends on the teaching, but also on many other elements beyond the educator's control (learners' openness to transformation, how individuals feel every day, other influences they are exposed to, a combination of external factors at the moment of the learning event, etc.). Only the tip of the

transformation iceberg can be assessed.

- The assessment of transformative learning is still largely experimental, with growing insight on what works, what is useful, what can be integrated as a substantial element of the learning process itself, etc. Therefore, when assessing the assessment, let's not berate ourselves if the assessment doesn't seem water-tight.

The online dimension brings advantages and disadvantages to assessment. For example, on the one hand, when only the face of the learner appears on the screen, it is harder for the facilitator to capture body-language as a component of assessment; on the other hand, in a peer assessment, it might be easier for introverted learners to open up about sensitive personal issues towards a peer in an online setting, because of the relative anonymity (we do not have to make small talk with the same person over coffee-break...). Once more, it is the art of the possible.

If assessment is the salt of transformative learning, the right dosage is the key!





## 8. The right timing

Last but not least, there is the time dimension: learners having learned to learn will most likely need time to assimilate and “digest” their learning, before engaging in new learning loops over time. A transformative learning event contributes to an ongoing process, where assessment always gives a reduced, one-off image. Ideally, assessment should also take place some time after the learning event, but other learning factors will have contributed, which moves us away from assessing “our” event.

Again, let's remind ourselves that the assessment - however limited or ambitious - is secondary. We learn from it what we can, individually and collectively, in order to do (even) better next time.

ONLINE ALCHEMY -  
HOW TO BOOST TRANSFORMATIVE LEARNING

Choosing and Using Software



# Choosing and using software

or

## How do I find the 'right' software/technology for my online transformative event?

Author: Mario Diethart

Yes, transformative learning is possible online! Working in a virtual environment can be as good as or even superior to face-to-face work, including when the aim is to support transformative learning. The tricks to success lie in the details - technology is one of the key ingredients in the "Alchemy of Transformation". But is there a recipe for which software or technology to use to achieve a smooth online learning experience?



PHOTO: NATHAN DURLAO

# Keep it simple!

When it comes to technology, theory and practice do not always align as expected. The interplay between software and users is a sensitive matter. As a rule of thumb, digital literacy of facilitators and participants, complexity of software, and applied methodology should be well balanced.

A general recommendation is to reduce the number of tools to a minimum and keep things simple - or introduce them thoroughly by providing introduction material, tutorial videos and ensuring solid onboarding of participants preferably with the whole group at the same time.

It is essential for the facilitator(s) to know how to handle the software and to anticipate what features will be used for what purposes.



**MAY I  
HELP YOU?**

# The right questions

We aim to give you a manual in hand that allows you to set up your virtual event fostering transformative learning. But rather than detailed instructions, we provide you with the essential questions to ask. Selecting software is a process that starts with analyzing the needs of the **event** and the **participants**, and setting them in relation to available **technology**.

For a good overview of available software and functions we recommend to search the internet with appropriate keywords and consult websites that compare multiple tools.



PHOTO: MOHAMED\_HASSAN



# Event

The term “event” can be perceived in a broader sense, comprising the larger context and setting in which the online activity takes place.

- In what frame is the event embedded (conference, lecture, seminar, school, workplace continued education, individual development, etc.)?
- What is the dominating character of the event (presentation, workshop, discussion, experience-based learning, etc.)?
- What is the objective of the event?
- What are the desired learning outcomes?
- Is it a single event or recurring? Short term or long term duration?
- Is it an online-only event or a hybrid event?
- What is the level of interaction foreseen between the facilitator and the participants and among the participants?
- Is there a specific method or didactical approach foreseen?
- Is there any communication between the facilitator(s) and the participants before the event? Do participants receive instructions related to content, methodology or the chosen technology in advance?



PHOTO: ALEXAS\_FOTOS

# Participants

Knowledge about the participants allows for better planning with regards to their needs and expectations. By analyzing the target group carefully the event can be designed in a way that it meets both the objectives of the facilitator(s) and participants' expectations.

- Are participants voluntarily participating or is participation mandatory?
- Which language will be used in the event? Are there any potential language barriers?
- How many participants are in the event?
- Do participants have experience in on-line settings and with specific tools?
- What is their attitude towards working on-line?
- Is there a large age gap between participants?
- Where are participants located geographically? Are they in different time-zones?
- Do all or most participants share a common culture, or do they come from widely different backgrounds?
- What level of education do participants have? Are all at the same level?
- What fields of expertise/professions are represented?
- What relation do participants have to each other? Do they know each other? Are there different levels of hierarchy present (e.g. in-house workshops)?



PHOTO: GERALT

# Technology

Based on the demands in relation to the event and the participants further questions shall be considered to decide upon one specific software or a combination of tools.

- Is one software/platform enough or is a combination of tools necessary? How can they be combined in the most effective way?
- What is/are the best tool(s) for the given objective (video-conferencing, whiteboard, polling etc.)?
- What license of one concrete software product is needed (free, paid version etc.)? Is it affordable?
- Is there enough support staff available to host the event (additional team members for chat, technical support, etc.)?
- Does the software offer localized versions (translation of interface into local languages/settings)?
- Is simultaneous interpretation or translation necessary/possible?
- Is the chosen software permitted in the given setting (data protection, country restrictions, corporate policy etc.)?
- Do participants use mobile devices or desktop computers? Is their hardware capable of using the chosen tool(s)?
- Can any technical problems be expected due to location of people, bandwidth etc.?



PHOTO: SIGMUND

# Technology in practice: three examples

## Scenario 1:

Event type: Online workshop

Duration: Single event, 2 hours

Participants: 15 experienced adult professionals with similar areas of expertise

Facilitation: 1 facilitator

The facilitator wants to host an intensive and interactive workshop. She knows that the participants are used to working in a virtual environment. She has prepared a detailed agenda for 120 minutes that foresees interaction among the whole group as well as in smaller groups. Therefore, one part of the workshop will happen in breakout rooms. All results shall be documented in order to be shared with the participants afterwards.

To use the time effectively and keep the setting simple the facilitator decides to stick to one platform that fulfills all demands (e.g. Zoom or Webex). The software allows her to prepare breakout rooms and polls in advance and to record the whole meeting.

After a couple of initial technical remarks the facilitator starts the workshop with an interactive introduction round connected to a poll she launches at the right moment.

Via the chat she shares a link to a website with inspirational material. She enables microphones and cameras for all participants and moderates a discussion. After the first part she sends the 15 participants into three breakout rooms with five randomly selected persons in each. In the breakout rooms participants have 20 minutes to complete a task by using the whiteboard function. During the 20 minutes, the facilitator pays a visit to each breakout room. Back in the main room, the participants report on the activities in the breakout session. The facilitator uses screen sharing to share a Powerpoint presentation (saved on her local hard disc or on GoogleDrive). She collects all inputs also including screenshots from the breakout rooms and distributes the file to the whole group afterwards.

Maker  
Space



Keynote  
Stage

← WC

Mot  
Ro  
Ref  
Spa

Fig  
Swa

Tho  
Wall

WC →



## Scenario 2:

Event type: Online scientific conference

*Duration: 2 full days*

Participants: 100+ persons, international and heterogeneous

Facilitation: Team of organizers and facilitators

A team of five persons organizes a scientific conference. Over 100 participants from around the world register for the event, some of them being actively involved as facilitators in sessions. The 2-day program includes multiple formats with different degrees of technical complexity. The organizers decide to use several tools throughout the conference: Miro to share a whiteboard, which is used as the central point of information before, during and after the conference; Slack as communication platform during and after the conference; Zoom as the primary video-conferencing software; Wonder as an interactive video-conferencing platform to socialize in breaks. The organizers purchase licenses for the software packages and keep expenditures relatively low (alternatively a more costly and complex all-in-one conference software could be used).

The organizers are aware that the participants are very diverse and have different knowledge about the used tools. They provide detailed technical instructions before the conference, including links to websites, video tutorials etc. Above all, they

introduce the registered participants to the Miro whiteboard as the main 'information center' of the conference. It is structured according to the conference program with dedicated spaces for each session including links etc. Also, results from workshops during the conference can be added to the whiteboard. In addition, the organizers offer a voluntary live test session in Zoom one day before the conference, in particular to check with the facilitators.

At the start of the conference, the organizers dedicate enough time to give detailed introductions to the tools. Next to the moderator, there are always team members available for trouble-shooting via the Zoom chat, email or Slack. The same is true for any breakout room that will be opened during the two days of the conference.

During the breaks the organizers invite participants to socialize on Wonder, which allows gathering in spontaneous groups for informal exchange. At the end of the first day and after the end of the conference, the organizers guide the participants to Slack to initiate and continue discussions on the conference topics. All conference materials and recordings are made available on Miro.



PHOTO: CHRISTINA

### Scenario 3:

*Event type: Multinational and multilingual hybrid workshop*

*Duration: Single event, 4 hours*

*Participants: 50 persons, international*

*Facilitation: 9 facilitators, 6 interpreters*

In the course of an international research project several face-to-face events have taken place in different countries, which were little effective. The organizers decide to hold the next event as a hybrid workshop with 50 participants, 9 facilitators, and interpreters in six countries. The setting is complex: There are five national teams ranging from 3 to 20 persons. Four of the national teams gather physically in one location, whereas the fifth meets online. The group of facilitators is located in a sixth country.

Zoom is used as software to connect all groups, translations are possible through the simultaneous interpretation function. On location, all necessary hardware is in place including loudspeakers, microphones, cameras, beamers etc. All involved facilitators and interpreters are instructed before the workshop (ideally in a test run).

The aim of the workshop is to help participants in bringing their studies and plans into action. The challenge is to move from knowledge transfer to active participation and increased action competence. Therefore, after the disappointing earlier experiences, the organizers dedicate high attention to program design and facilitation.

They design a very detailed outline for the four-hour program with time slots for: introductions, presentations of each national team, summary by facilitators highlighting challenges/barriers, expert inputs, group work, plenary summary outlining next steps for each country and for the group of countries, and breaks. All items have clearly assigned responsibilities.

During the workshop, the facilitators make an effort to create a safe space and establish trust between the participants. They observe the time carefully including breaks and how they are organized locally.

The event turns out to be successful with active participation yielding realistic and clearly anchored action plans thanks to the good preparation of the whole team in terms of program design and facilitation.

ONLINE ALCHEMY-  
HOW TO BOOST TRANSFORMATIVE LEARNING

Multisensory Facilitation Online



# Multisensory facilitation online

Author: Jutta Goldammer

If you talk about online facilitation, the first thing most people think of is video conferencing: sitting in front of a computer screen, listening and talking to others. And yet there are so many more ways to facilitate a learning experience online, and there are so many more channels available to make facilitation fun and impactful - using multisensory facilitation.

Multisensory facilitation means the deliberate application of several senses in the communication process. It is applied extensively in some fields (like advertising), but seldom in other fields (like academia). Although its positive effect on learning has been proved by a multitude of studies<sup>1</sup>, it is used mostly to teach pre-schoolers or children with learning disabilities, but very little in regular grade schools. In higher education and other learning events with adults, it is even more common to focus entirely on reading, speaking and listening.

Many of our learners spend long hours sitting in front of the computer, and the shift from on-site learning to more and more online learning has added extra hours in front of the screen. Giving them breaks and variety e.g. by including their surroundings into the facilitation, or by encouraging them to move their bodies or use their hands, helps them keep their focus, engage more deeply in the learning process, and learn with joy and ease.

There are also different types of learners. Not everybody learns best by listening and speaking. If you vary the appeals to the senses, you make your learning experience accessible to a more diverse audience.

*'Learning is experiencing.  
Everything else is just information.'*

ALBERT EINSTEIN

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1 e.g Ladan Shams, Aaron R. Seitz: Benefits of multisensory learning, find full article here: [https://www.researchgate.net/publication/23270851\\_Benefits\\_of\\_multisensory\\_learning](https://www.researchgate.net/publication/23270851_Benefits_of_multisensory_learning)



PHOTO: MILADA VIGEROVA

# 1. Getting attuned: multisensory preparation

What is often missing in online courses is a phase of transition and an opportunity to attune to the experience ahead. In an on-site course you have the preparation in advance: you choose your diet, check out travel routes, pack your suitcase and have a way - long or short- but always some time that allows you to tune into the upcoming event. Not so in online courses. Most participants sit at their computer, have another meeting the moment before or check their emails and right away jump into the online course.

You can create a transition time for your participants that helps them to fully immerse into your learning experience, for example in the following ways:

1. Engage them in preparations, for instance by

- Preparing some delicious tea, coffee, fresh fruits and snacks for their breaks
- Assembling materials for planned creative work, such as pens in beautiful colours, Lego, old magazines for collages
- Adopting a certain dress code for a celebratory event.

For longer events, recommend that they create a time that really belongs to them by writing an absence reminder, attending to the most urgent issues that need organizing beforehand, and making sure children, partners, colleagues or neighbours can live without them for the duration.

2. Another beautiful gesture that helps get into the mood and look forward to the online course is to send the participants a little package with snacks for the break, a logbook for their personal learning journey or other items you will be using during the workshop.



PHOTO: JUTTA GOLDAMMER



## 2. Using the learner's physical surroundings

Many exercises for which, in an off-line event, you as facilitator would provide materials can be adapted to make optimum use of online opportunities. This applies not only to materials that can be assembled in advance (as in the previous tip), but also improvisations.

One example is the method Team Machines, used for team-building. The intention is to get to know each other's hopes and fears and start a dialogue about what is important for successful collaboration.

- The task is to take 10 minutes to create a 'machine' out of any props they find in their surroundings.
- The machine should produce one or several qualities they find important for collaborating in a team.
- The participants then show how their machines work and what they produce.

This exercise brings you straight to the core values of the group, gives a break from the screen, allows participants to move about, invites creativity and leaves the participants uplifted and energized.



er table:  
own question here



Where do you find TL most urgent? Where do you find TL most important?



### 3. Visuals that trigger imagination and memory

At an online event inspired by the World Cafe method, photos of different tables were used to mark different groups. Visuals on an online whiteboard created an inspiring atmosphere and invited positive feelings. The different settings of the tables such as library, beach bar, Tajik tearoom or mountain hut not only conveyed a positive atmosphere but also helped remind participants of the discussion taking place at each table.

Visuals can similarly be used to enhance the experience of other methods online, for instance Open Space. Even if it is a small thing to do, it feels very different from a discussion with a blank whiteboard sheet or just sitting together in videoconferencing.

Adapt the tables or other spaces to the topic or general theme of the session you facilitate or to the general atmosphere you want to create.



PHOTO: RUPAM DUTTA

## 4. Moving thoughts: Online walks

For thousands of years monks have known about the supportive effect of walking while thinking, and have built cloisters in their monasteries that made it easy to read or immerse themselves into a deep conversation while walking. Why not make use of this well-tried practice more often? It usually takes no more time than just sitting in front of the screen and talking. Here are a couple of our favourites:

1. Breakout sessions online. Pair up your participants in breakout rooms, give them one to three guiding questions and send them on an online walk together with their phones (usually videoconferencing tools offer phone numbers in case your participants have no smartphones or data flatrates). Dyades are also a brilliant setting to go on a walk with someone else, find the step by step guide [here](#).
2. Send your participants out alone with a perception or reflection task adapted to the topic of your session, such as: "Find one object on your walk that represents what you want to take out of this course" or "Walk very slowly, open all your senses and become aware of at least three things you have never noticed before".
3. It's easy to integrate walking into normal meetings or teaching sessions by marking in advance when there is no need to take notes or watch the screen and encouraging your participants to go out walking while they take part in the session.



PHOTO: SOUNDTRAP



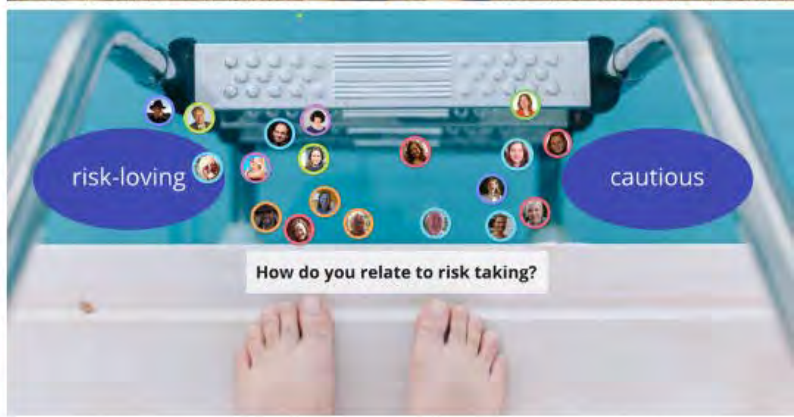
PHOTO: JUTTA GOLDAMMER

## 5. Allowing the brain to rest - curated breaks

In an on-site setting participants usually leave the room to have a coffee and some fresh air during breaks. Online, it can easily happen that the participants get stuck to their computers during the breaks to just quickly check the emails or react on a social media post or such.

Help your participants to get a real rest in their breaks by offering little tasks that keep their senses busy but allow their brains to relax. Some favourites?

- Put on some music and invite to dance
- Send for a walk, with a request to bring back something from outside
- Have a little break concert with one of the participants playing an instrument
- Suggest they dip their face for two minutes into a bowl of water with ice cubes -the cool water and absence of breathing strengthen the parasympathetic nervous system which is responsible for relaxation. The ice-water exercise needs some preparation and some trust, or willingness to experiment and engage in unusual practice. But this little biohack is enormously effective - and fun.



**In which phase of a project do you feel most at home?**



PHOTO: JUTTA GOLDAMMER

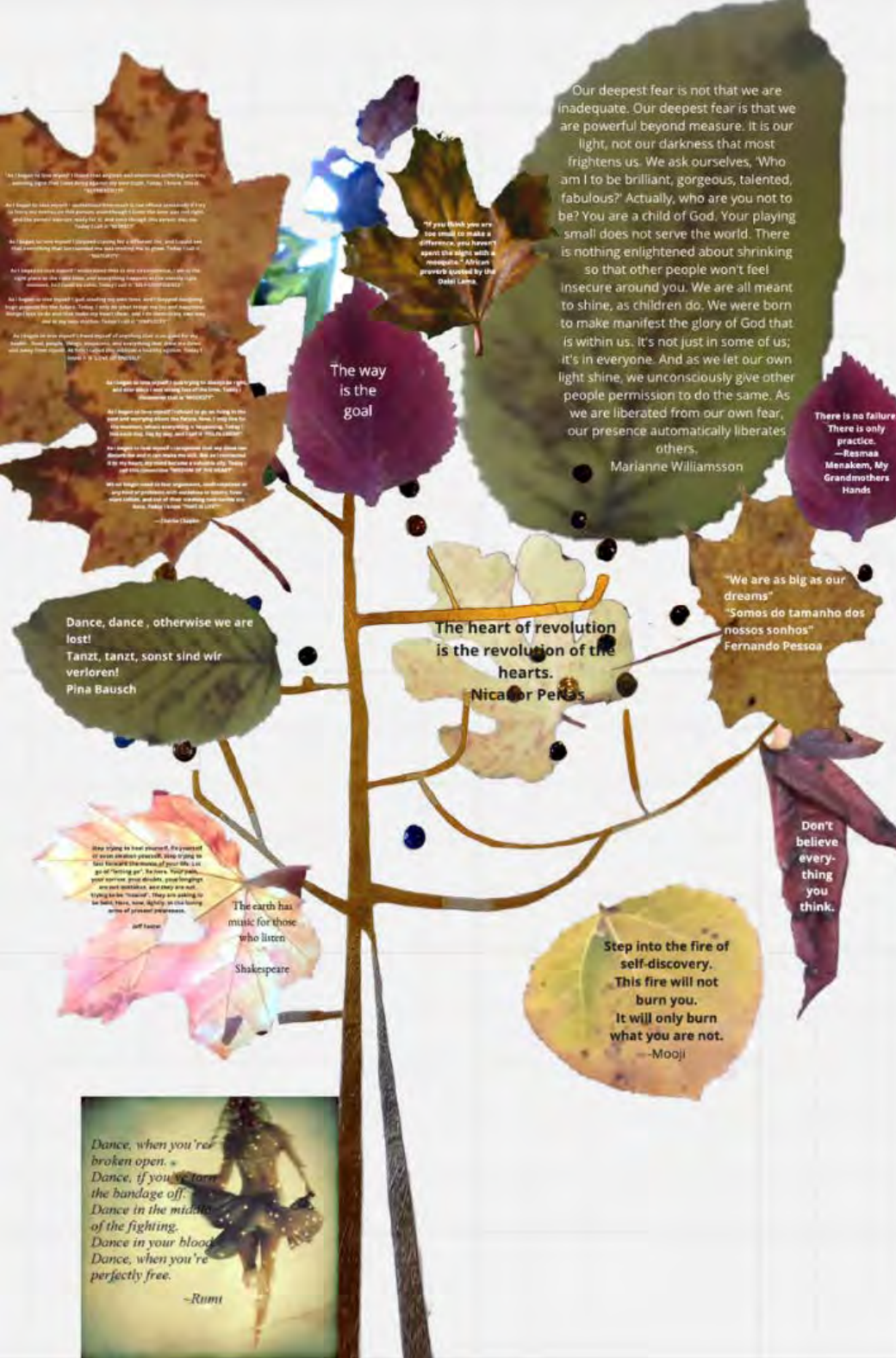


## 6. Emulating proprioception

Proprioception, is the sense of self-movement and body position. It comprises **position and relation in space, strength and tension in the muscles** as well as kinaesthetics, the sense of movement. One example of the use of proprioception is the method known as 'systemic constellation'

Systemic constellation is more powerful in an on-site setting than online as it includes the component of physical movement and spatial perception. But some systemic constellation exercises such as [spectrum lines](#) are powerful also online, using avatars or sticky notes with the participants' names and give a lot of insights, including a good overview of the group, stimulate conversation, and are fun. Prepare a template with the poles and invite the participants to move their avatar to the position that feels right to them.

We often use it at the beginning of a workshop so everyone gets a feeling for the group. It is nice to hear a few statements of people telling why they chose a specific position in the plenum, but you can also start small breakout groups from there to have pair- or small group conversations with either people who chose a similar position or who have a totally contrary position.



Our deepest fear is not that we are inadequate. Our deepest fear is that we are powerful beyond measure. It is our light, not our darkness that most frightens us. We ask ourselves, 'Who am I to be brilliant, gorgeous, talented, fabulous?' Actually, who are you not to be? You are a child of God. Your playing small does not serve the world. There is nothing enlightened about shrinking so that other people won't feel insecure around you. We are all meant to shine, as children do. We were born to make manifest the glory of God that is within us. It's not just in some of us; it's in everyone. And as we let our own light shine, we unconsciously give other people permission to do the same. As we are liberated from our own fear, our presence automatically liberates others.

Marianne Williamson

The way is the goal

There is no failure. There is only practice.  
—Rasmas Menakem, My Grandmothers Hands

"We are as big as our dreams"  
"Somos do tamanho dos nossos sonhos"  
Fernando Pessoa

The heart of revolution is the revolution of the hearts.  
Nicae or Peka's

Step into the fire of self-discovery. This fire will not burn you. It will only burn what you are not.  
—Mooji

Dance, dance, otherwise we are lost!  
Tanzt, tanz, sonst sind wir verloren!  
Pina Bausch

The earth has music for those who listen  
Shakespeare

Dance, when you're broken open.  
Dance, if you've torn the bandage off.  
Dance in the middle of the fighting.  
Dance in your blood.  
Dance, when you're perfectly free.

—Rumi



"If you think you are too small to make a difference, you haven't spent the night with a mosquito." African proverb quoted by the Dalai Lama.



### What is your Team Spirit like?

- What kind of **temperament** should your team spirit have?
- Which **parts of the body** should be particularly pronounced?
- What **colour** should your team spirit have?
- Which **shape** should it have? Round, square, elongated, compact?
- What **gender** should your team spirit have? Is your team spirit male, female, gender neutral or something else?
- How **old** is your team spirit?
- Resting or moving?
- Extroverted or introverted?
- Careful or daring?

PHOTO: JUTA GOLDAMMER

## 7. Visual Cocreation - Poetree and Teamspirit online

There are many different online tools that allow to simultaneously work in a shared creative space such as Miro or Mural. Use them to cocreate a piece of arts with your participants. Here we give you two examples to stimulate your imagination for your own facilitation practice: In a workshop about empowerment that took place in autumn, we asked the participants to bring a poem or quote they found empowering as a preparation. During the workshop we sent them out for a walk with the task to find a beautiful autumn leaf. In a co-creative process on an online whiteboard we gathered the leaves and poems to a common empowerment tree. In the teambuilding phase of a new project we invited the participants to commonly create a personalized teamspirit for their team on an online whiteboard - and while they drew and designed a certain feature of the teamspirit to comment on what matters to them. which then served as an opener to communicate about common values, [guiding principles and shared agreements.](#)



PHOTO: SURFACE

## 8. Connecting with body and soul - Meditation and Bodywork

Meditation and bodywork are both excellent ways to reconnect your participants with their bodies and senses in online meetings, enhance awareness, focus, connectedness and creativity. Depending on the cultural background of your learning group and on how comfortable you are with bodywork and meditation yourself, you might think “I cannot dare to involve my participants in such woo-woo exercises”. This can be especially challenging in groups that are used to do only talking and listening in their online meetings. They will realize how beneficial those exercises are for them once they have experienced them. Here a few ideas that make it easier to introduce bodywork or meditation to groups that are new to it:

- Before you do the exercise give a bit of scientific background to relax the rational minds and thus help engage in the exercise - an explanation why it is done, what are the processes in the brain while you do it, and the benefits for wellbeing or productivity. Examples of successful companies or well known people who work with those techniques also might help.
- Start small. You don't need to right away make a whole hour of bodywork, just sprinkle in here and there a little one minute of awareness -, mindfulness or stretching exercise, a bit of rubbing the ears, taking a few conscious breaths or shaking out the body is usually no big deal for most people.
- Allow privacy. Indeed, working online has a great advantage here compared with on-site workshops. You can easily create a space where the participants hear your instructions, but can be invisible and inaudible themselves. Usually we invite the participants to either step a side next to the computer or turn off their camera if they feel more comfortable. Making funny moves that might feel embarrassing in public are totally OK if no one is watching.
- You can also start to do it as an additional offer, for example before you start the official meeting: “All who want to do some meditation or bodywork come 20 Minutes earlier.” Then you create a habit of finding bodywork or meditation normal amongst a part of the group and they can support you in the group's acceptance when you introduce it later on in the official part of the course.



PHOTO: JON TYSON

## 9. Gathering information on site - Interviews with people around

There are often moments in learning or developing processes where it is very helpful to gather real information from real people instead of just making assumptions. Working or learning together online gives a unique opportunity to gather many people's voices in no time, as each of the participants has access to different people. We found that especially helpful in design sprints when we wanted to find out how our users or beneficiaries think and feel, what their most pressing problems and their needs are. Here is an example from one of our online social innovation courses. The participants' challenge was to develop ideas how to improve life for homeless persons. We sent them out to lead [empathic interviews](#) with homeless, social workers and politicians and go to institutions and charities that provided offers for homeless to tap into the field of homelessness and understand the problems and difficulties. Each participant brought in their insights with their interview partners and in a short time we had a huge collection of touching, unsettling, unexpected, even humorous stories from all different perspectives of homelessness and the way the different countries and cities dealt with those problems. In an on-site workshop setting we could never have realized such a variety of insights. Leading

interviews is just one of many opportunities to use the real life surrounding of the learners as a source of insight. Of course you can also send your participants around to immerse into a certain experience such as spending a day in a soup kitchen or taking photos and documenting about the topic you are researching about.



PHOTO: PABLO MERCHÁN MONTES

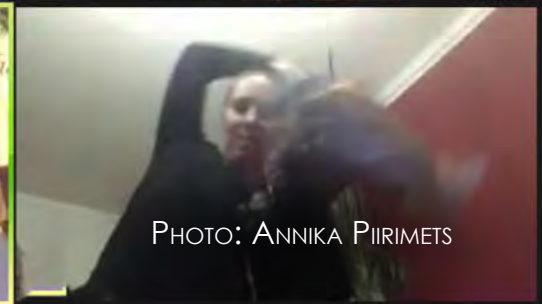
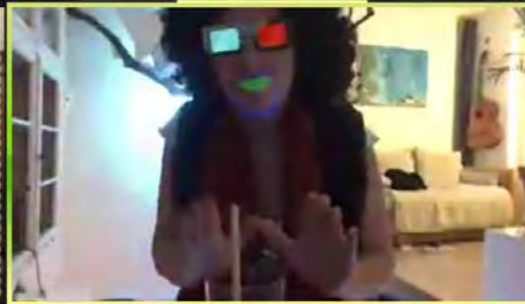
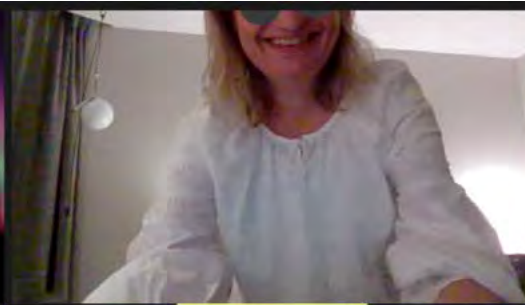


PHOTO: ANNIKA PIIRIMETS







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