VIRTUAL PEER ASSIST
/ Getting help from experts to overcome challenges /

WHAT IS A VIRTUAL PEER ASSIST?

A Virtual Peer Assist is an online group conversation between a learning group and an advisory group, taking place over a few hours, with all participants online simultaneously. It is analogous to a peer review for a paper or publication, but instead of getting written comments on a document, a Virtual Peer Assist generates verbal comments and guidance (and usually some references to relevant, pre-existing written materials) on the plans for a project/initiative/other work-related challenge.

A Virtual Peer Assist provides a safe environment for a learning group to articulate a challenge or problem they face, and for an advisory group to respond by sharing what they know from their own relevant experience – in the form of suggestions, anecdotes, good practices and recommendations – to help address the challenge.

The learning group is composed of 1 - 6 persons working on the same project/initiative. The advisory group (of similar size) consists of persons who have solid experience in facing comparable challenges or solving similar problems. Advisory group members are not necessarily from the same team; they may be from different teams or even different organizations.

A facilitated activity, the Virtual Peer Assist is conducted online via web conferencing tools (such as Skype for Business, Adobe Connect, etc.). It should be considered especially when other sources of project advice (such as existing documentation, Knowledge Exchange communities, etc.) cannot offer the breadth and depth of perspectives needed.

REQUIREMENTS:

- Facilitator
- Web conferencing platform
- For each participant: Computer and headset with microphone
- 6 – 12 participants (combined total for learning and advisory groups, and including a rapporteur)
- 60 – 120 minutes
- IT support
WHEN AND WHY TO USE

Virtual Peer Assists are useful:

- For planning new projects/initiatives. Virtual Peer Assists are best done before implementation begins, while plans are being drafted or can still be changed and while the project team is likely more willing to consider new approaches – i.e., ‘learning before doing’. The learning group may use the Virtual Peer Assist to understand project issues more deeply, anticipate potential obstacles before they arise and make appropriate provisions in their plans, based on the advice of an advisory team with extensive experience.

- In particular, for planning projects/initiatives in very new areas where there is little or no prior knowledge or experience on the team, and/or for planning projects that have high risks and costs to failure. A little judicious advice from experienced persons could save a lot of money, time or difficulty. (Really complex projects may require a face-to-face Peer Assist, taking half a day or longer.)

- During implementation, when a complex technical challenge reveals itself, and swift action is needed, but the responsible team is uncertain of how to proceed. A Virtual Peer Assist may offer a fast, cost-effective solution for challenges faced during the implementation of a project, by engaging others familiar with the challenge, from within or beyond the organization.

Virtual Peer Assists offer several advantages. The first of these comes from the ‘peer’ nature of the process: The advisory group and the learning group usually consist of people with similar roles, backgrounds and common interests, i.e. peers. These commonalities may make the learning group more receptive to good advice and suggestions from the advisory group.

The online format of the Virtual Peer Assist enables organizers to invite participants in any location. This may make it easier to cast a wide net and find people with the right experience, even from other organizations. It is usually easier (and much less expensive) to get a couple of hours of online participation from a busy expert, than it is to book their time for 1-2 days and fly them to a face-to-face meeting.

Virtual Peer Assists are also learning opportunities for the advisory group, who get the chance to see their ideas discussed, adopted and applied in new contexts. (Follow-up between the two groups is important for this to happen; see ‘How to apply’ below.)

HOW TO APPLY

Prepare in advance
These instructions are for the organizer of the event.

1. Consider whether a Virtual Peer Assist is the right tool. Virtual Peer Assists require considerable coordination to set up. In some cases
you may be able to learn what you need to know through other, simpler means, such as through an established community of practice (Knowledge Exchange Community), an e-discussion, an expert interview, or simply through online research, manuals or other documentation. But in other cases, particularly when planning significant projects in new areas, knowledgeable peer support can make all the difference.

2. Once you have opted for a Virtual Peer Assist, decide when to do it. The peer assist tool is most useful once the problem or challenge has become clear to the responsible team, but before the implementation work has begun.

3. Articulate the problem or challenge as clearly as possible, together with the learning group.

Define concrete objectives and deliverables, in order to help the advisory group provide the most useful advice. Indicate any existing time and resource limits, and any uncertainties or scope for expansion in these areas.

Stick to problems or challenges that can be clearly defined: A Virtual Peer Assist is not suitable for extremely complex problems that are difficult to define, have too many unknown variables, or lack limits or end points. In such cases the peer assist process will not produce tangible solutions. Think also about what information will be shared with the advisory team; what are the specific goals and objectives of the peer assist itself; and what type of answers you want to get out of the activity.

4. Create a list of potential advisory group members, and share it with the entire learning group for confirmation. Ask colleagues and tap into their networks; search on the organization’s intranet, knowledge sharing platforms and relevant social networking sites; and check with connections in other organizations to see who may have useful comparable experiences. Due to the virtual nature of the peer assist, your choices are not limited by geographic location. Ensure that the learning group has the final say, since they must feel comfortable with potential participants.

Plan for about 6 - 12 participants total, including both learning and advisory groups, keeping the groups roughly equal in number. If you want more diversity in the discussions, then prefer the higher end of the range – about 10 - 12 participants. In most cases, do not exceed 12 participants, since there likely won’t be enough time to hear and discuss all the contributions.

Apply some criteria to choose potential advisory group members. They should ideally be:

- Well-versed with the topic or technical problem.
- Experienced in tackling similar challenges / problems (whether successful or not; learning from others’ failures can be hugely valuable).
- Willing to share what they know, including lessons from failures.
- Good communicators.
- Persons whose opinions are valued by those being assisted.
- Members of relevant communities of practice or professional networks.
- As a group, sufficiently diverse to be able to offer a broad range of options and perspectives, perhaps from multiple disciplines or diverse organizational backgrounds.

Diversity enhances the chance of relevant advice and even potential breakthrough solutions.
5. Select a facilitator to manage the discussions, preferably someone with experience in online facilitation who is not a member of the project team. The facilitator sets the tone for an organized, efficient meeting by managing the needs of the learning team and meeting the objectives within the stipulated time. The facilitator’s role is to:

- Be welcoming, enthusiastic and organized.
- Encourage the learning group to clearly present and explain the problem for which they want peer input, so it is understood by the advisory group.
- Encourage participation from the advisory group, get them to share their stories and their views on key steps and success factors.
- Summarize key lessons and suggestions, and get the peer group’s validation on these.
- Seek confirmation from the learning team on their key action points.
- Manage the time effectively, move through the agenda and reach the desired conclusion.
- Provide simple technical support, e.g. advising participants how to unmute their microphones, etc.

6. Choose a web conferencing platform for the event (e.g., Skype for Business, Adobe Connect, etc.). The platform should be easy to use, accessible to all potential participants including any from outside the organization, and should support video connections if the participants’ bandwidth will allow. The facilitator should be confident with using it. Ensure that technical support will be available at short notice during the event; you may wish to pre-book a support appointment with your IT department, or just know how to obtain help quickly if something goes wrong.

7. Designate a rapporteur, ideally from the learning team, to listen to the discussion and carefully capture all the important lessons, recommendations and suggested good practices. The rapporteur should be prepared to display the notes online to the participants, either continuously or at intervals during the session, to help them follow along and validate what is being captured. (This can be done by sharing a Word file with their notes through the conferencing platform, or by using a Wiki that is visible to everyone).

8. Discuss and prepare the agenda and supporting documentation. Involve the facilitator and the entire learning team in this. Prepare the following documents.

a Agenda, including:

- Meeting date and time. For participants based in different time zones, make sure to pick a suitable time slot that everyone can accommodate.
- A few specific learning objectives, discussed and agreed by the learning team.
- Sequence of events at the session. Allow for brief introductions, a short initial presentation/briefing on the problem or challenge by the learning team, and thereafter a discussion with comments from the advisory team, questions and answers.

b Briefing document that frames the challenge succinctly and clearly, to be shared with the advisory group before the Virtual Peer Assist takes place.

- Optional: 3-5 slides summarizing the briefing document, to be presented at the start of the session by a member of the learning group.
**C Brief instructions for advisory group participants.** Their role is to listen and understand the problem within the given context, reflect on their own experiences, and if possible suggest practical recommendations and advice.

**d Quick guide for participants on how to use the web conferencing tool.** Copy and paste the most essential bits from existing reference materials, and if needed have it looked over by a person with plenty of experience with the tool.

9. **Invite potential advisory group participants by email at least 2 - 3 weeks before the meeting.** Send them the agenda and all supporting documentation, so they can decide if they are a good fit. Follow up as needed to confirm participation.

*Send those who agree a reminder a couple of days before the event, and include the full list of all participants.*

*Send another reminder one hour before the event is scheduled to start.*

**When you are ready to start**

*These instructions are for the facilitator.*

10. **Welcome the group and do a quick round of individual introductions.** Then provide a short overview on how the Virtual Peer Assist will be conducted, as per the steps below. Mention also the role of the rapporteur.

11. **Ask a representative from the learning team to present the problem and explain their needs** (using slides, if these were prepared in advance). Ensure that the briefing is kept short (5 - 10 minutes) in order to keep the focus on hearing from the peer group.

12. **Begin the peer discussion.** Instruct participants to say their names before they start talking. For a group of 6 -12 the conversation should be easily manageable. If the conversation becomes too animated or challenging, intervene to make sure only one person speaks at a time. Tip: You can call on each person in turn for their questions/inputs, or you can designate a speaking order by assigning a number for each participant. Ensure the rapporteur is capturing all important points from the discussion (as bullet points) and sharing them on-screen with participants as needed for confirmation. Keeping the focus on the learning objectives, divide the discussion into 4 steps:

1. **The advisory group ask questions for clarification.**

2. **Individual members of the advisory group reflect out loud, one by one, on the problem shared by the learning group.** They give their impressions of the salient points, point out what they thought was missing, share any relevant stories from their own experience, and indicate what they think the learning team needs to know or do in order to meet the challenge. You may need more than one go-around in this step.

3. **What lessons are emerging?** This is an open group discussion. Kick off this step by citing a couple of what seem to be emerging lessons, get confirmation from the advisory group, allow questions for clarifications from the learning group, and prompt all participants for suggestions and feedback.

4. **What specific actions are proposed?** Should the learning team be doing anything differently? Call upon individual members of the advisory group, then
Proceed to an open discussion with questions as needed.

13. Conclude the Virtual Peer Assist. The learning team thanks the members of the advisory team and makes a commitment to share their summary of what they learned from the Virtual Peer Assist, as well as their planned course of action on the project, initiative or problem.

Follow up
These instructions are for the organizer.

14. Send a thank you email to all participants immediately after the peer assist has ended. Remind participants of any agreed follow up actions, such as offers by the advisory group to send additional documents or examples. Inform both groups that, if there is sufficient interest, they are welcome to maintain email communications, share project updates or additional advice/recommendations, and otherwise engage in informal professional networking.

15. Together with members of the learning group, prepare a document summarizing the learnings from the Virtual Peer Assist and the resulting actions that the learning group will undertake. Base the document on the rapporteur’s notes. Share the document with the advisory group members. Also consider sharing it on relevant knowledge sharing platforms for the benefit of other colleagues who may tackle similar challenges in the future.

16. (Optional but nice) If possible, the learning group can give the advisory group an informal update, perhaps a few weeks or months after the session, about how they applied the learnings from the Virtual Peer Assist, and what results were achieved.

TIPS FOR SUCCESS

Learning group

- Ensure that their briefing document is both clear and concise (3-4 paragraphs), and adequately explains the problem and the assistance requested. The invitees should be enabled to understand the problem before coming to the session.
- Avoid taking too much time explaining the context of the problem at the start of the session, by sticking to a succinct presentation of 3-5 slides with key bullet points only.
- Be active listeners during the session, maintain an open-minded attitude, and give the advisory group sufficient time to articulate their thoughts and recommendations.
- Respect the privacy and confidentiality of
the discussion content.
• Provide a rapporteur who is a member of their own group, able to understand the issues, quickly grasp and capture all important points put forth during the session.
• After the session, make its own final decisions on how to use the inputs received. The learning group itself is best placed to know if and how the advice can be applied.

Advisory Group

When inviting potential advisory group members, consider not only their technical qualifications but also their willingness to share. In your invitations, let potential participants know why they have been selected (e.g. a recommendation, their publishing record, their previous roles in specific relevant projects, etc.). Advise them that there will be multiple participants at the Virtual Peer Assist, both learners and advisors and share names in advance if possible in case of any conflicts of interest. Brief them on their role. The role of the advisory group is to:

• Freely impart knowledge, share their own relevant experiences and anecdotes, and offer constructive suggestions to address the problem.
• Guide the learning team towards useful information sources.
• Be respectful of others when giving opinions, and sensitive to the challenges faced by the learning group.
• Respect the privacy and confidentiality of the discussion content

Other tips

Ensure IT support will be available fairly quickly if needed during the session.

For particularly complex problems, a Virtual Peer Assist may not be the best option. Instead a face-to-face peer assist, requiring a half-day or more, may be a better choice. However, if potential advisors are only available online, then you can break the problem down into manageable chunks and plan for a series of Virtual Peer Assists over several weeks, with everyone meeting once a week.
VARIATIONS

For small groups: A Virtual Peer Assist may also be conducted informally and for smaller groups. For instance, if an individual has a particular work problem or would like to know more about implementing a new task or activity, s/he could invite 4 - 5 people with relevant experience for a peer assist. There should still be invitations and a briefing document, but these can be quite informal. Participants are at the discretion of the persons seeking advice. With a group this small, the facilitator could be a member of the learning team.

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