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# Incorporating Experiential Theory into Virtual Strategic Planning Processes

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Incorporating Experiential Theory into Virtual Strategic Planning Processes

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SIT Graduate Institute

November 21, 2016

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CLC - Training

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**List of Abbreviations**

- AFS – Formerly American Field Service
- AFS-USA – The US based organization that partners with AFS organizations around the world to facilitate youth exchanges.
- AFS International – The overseeing body for certain operational functions between AFS country organizations
- DIAG – Diversity and Inclusion Advisory Group
- NVA – National Volunteer Assembly
- TOT/ToT – Training of Trainers

**Abstract**

Experiential learning theories, such as David Kolb's Experiential Learning Cycle (2015) contribute to more than just learning environments. In this Training Course Linked Capstone I facilitated a six-week strategic planning workshop for the Diversity and Inclusion Advisory Group (DIAG) of AFS-USA, an intercultural youth exchange organization. Kolb's cycle acted as framework for the workshop. The DIAG operates as a virtual team, with members across the United States, therefore I designed the workshop for implementation via the internet and telephone conversation. I consulted research on virtual team structure and participatory practices in strategic planning in order to design a program which solicited participant input while respecting participants' availability.

Some challenges, particularly participant engagement, proved difficult to overcome. And on occasion activities had to be modified or combined in order to better suit the team's needs. As I became more flexible with the design, participant engagement increased. At the same time, the nature of the workshop environment, predominantly the internet, provided opportunities to incorporate "net-native" concepts that allowed participants to access and engage with the workshop in their own ways and at their own pace, when possible. In the end the DIAG was able to strengthen connections with fellow team members and develop several concepts for future projects and mission statement language. We are now considering expanding the advisory group in order to be able to implement many of the projects developed through this workshop.

### Acknowledgements



This kid has come a long way.

I have abundant gratitude for an advisor who, in some ways, worked as hard as I did in to get this project finished, a partner who knows the support that is needed even when it is not asked for, the DIAG, a supportive group doing important work, and a special group of AFSers who know when to drop everything to ride a roller coaster.

**Diversity and Inclusion Advisory Group Virtual Strategic Planning Workshop**

*“By 2017 AFS-USA will have a diverse community of volunteers whose passion and talents are matched to fill varied and meaningful roles aligned with our dynamic business models.” (AFS-USA, 2013).*

I have chosen to analyze my role as designer and facilitator of this Virtual Strategic Planning Workshop as the basis for this Course Linked Training capstone. In this project, I explored the implementation of Experiential Learning Theory, developed by David Kolb (Kolb, D. A., 2015), in the setting of strategic organizational planning for the Diversity and Inclusion Advisory Group (DIAG) of AFS-USA. Formerly American Field Service, AFS-USA is an intercultural youth exchange program featuring immersive intercultural education programs. Formed shortly after AFS-USA’s 2013 Strategic Plan, the DIAG is the overseeing body for the majority of efforts to diversify AFS-USA stakeholders as well as to influence organizational culture to be more inclusive of people of diverse backgrounds and identities. At the beginning of this project the group lacked clear direction or significant results of direct action on behalf of underrepresented groups. Following a needs assessment sent to the members of this group as well as more than eighty volunteers who had expressed interest in DIAG efforts, the following purpose, goals, and objectives emerged.

**Purpose:**

To develop a plan that includes direct action on multiple fronts while continually evaluating the DIAG’s organizational influence to meet our needs for accountability and freedom to act appropriately on behalf of marginalized stakeholders.



**Goals and Objectives:**

- I. Update DIAG web presence to reflect current group members and values.
  - a. Update DIAG wiki profiles for all participants.
  - b. Connect pairs of participants to begin sharing and brainstorming interest and motivations to work with DIAG.
- II. Develop a mission statement and framework for future project proposals
  - a. Develop a framework for consideration of new projects which includes considerations for underrepresented groups, volunteer and staff experience, and group and organizational goals.
  - b. Develop a mission statement incorporating, as needed, organizational language as well as influence from research into external organizational diversity efforts, and input from participants.
- III. Co-create project ideas for implementation.
  - a. Using input from the needs assessment and the framework developed previously, create several project concepts for development and implementation.
  - b. Identify key individuals to take on responsibility for project development where interest exists.
  - c. Plan outreach to eighty interested volunteers to expand resources for the DIAG and for each project as needed

**Rationale for AFS – DIAG Strategic Planning Workshop**

While it is true that AFS-USA is an organization that benefits from a wealth of knowledge and experience from staff and volunteers, many of whom have travelled around the world, it is one that does not draw the same diversity of knowledge and experience of the variety of cultures here at home. The AFS-USA demographic currently reflects a volunteer base of: Caucasian (69.3%), female (63.6%), and volunteers between the ages of 41-60 (59.7%) (AFS-USA, 2010). Current efforts have been made to collect demographic data, but a recent, full volunteer census is not currently available. As there is no published information regarding current demographics, organizational efforts to diversify might indicate progress, however there are few efforts outside of the DIAG purview to diversify, and as previously stated, the DIAG itself is now working toward project development.

As a nonprofit organization funding is often limited, and though diversity exists within the organizational strategic plan, even initially funded actions have faced a lack of follow through. Facing Our Biases is a group that developed out of an internal changemaker project development action. The group's actions to hire a Diversity Officer and a consultant to identify areas of improvement for organizational diversity and develop a subsequent training program have been put on hold. Even a Bias Response Policy, which the group designed for organization-wide implementation, is on hold for review. The Facing Our Biases projects are now under the umbrella of the DIAG. In order to meet organizational goals, it is necessary for interventions to be designed and implemented in order to develop and empower a diverse volunteer base. Lacking budget and opportunities in which the DIAG could be in the same physical space, this four to six-week strategic planning workshop was designed. It is through this work of engaged

participatory teambuilding and project planning that I hope the DIAG will be able to help guide the organization.

*My Personal and Professional Experiences with AFS*

My experience with AFS began as a high school exchange student, continued as a volunteer and trainer, and most recently, co-chair of the DIAG. Experiential, practices including Kolb's Experiential Learning Theory, are familiar to AFS. The programs offered are guided, immersive, and educational experiences. Through my own program, which consisted of one school year in central France, I began to understand the power and merits of guided experiential learning. One activity, a guided simulation of a tribal ritual, was a particularly impactful and high risk activity in which volunteers led an orientation mid-way through the year. Though fellow practitioners have pointed out its basic nature, the particularly skillful delivery of the activity called "Albatross" (Mukhopadhyay, C. C., 2014) remains with me to this day. It is an experience of immersion and discomfort, similar to that of the actual exchange experience, and yet the activity also introduces very strong discussions of gender roles and our acceptance of them. As a group of exchange students, the discussion, prompted by the activity, was enriched by the multicultural perspectives on these topics.

After returning home, and completing undergraduate studies I returned to AFS as an orientation volunteer for the Greater Puget Sound (GPS) Area Team. Remembering the vibrant and exciting activities like Albatross which our twenty-something French orientation volunteers delivered, I was surprised to find that AFS-USA appeared to be less engaging in a variety of ways. Volunteers seemed entrenched in certain roles, and there was not consistent skill among the volunteer body working with participants from other cultures. Orientation volunteers had

high hopes of providing students the type of enlightening experiences my fellow participants and I had had in France, but the result was often troubling. I observed that participants from more familiar cultures were engaged more deeply in activities, and thereby potentially gaining deeper learning than their less familiar counterparts. I don't doubt that we were successful in guiding students through enriching experiences, however the GPS area team had an established way of delivering orientations which had not been updated to recent standards and expectations of AFS and experiential learning

Some time into my role as an orientation volunteer, I participated in a Training of Trainers focused specifically on pre-departure orientations for participants from the US intending to study abroad. Here, I began to find what I sought in facilitation training. A group of approximately twenty volunteers and staff gathered in San Diego to learn, primarily, the implementation of Kolb's Experiential Learning Theory and the Theory of Multiple Intelligences (Gardner, 2006). After this training experience I was soon coordinating national-level orientations with fellow volunteers and staff. Within a year I was recommended as the US participant in a new initiative driven by AFS International. An SIT graduate student had arranged a practicum with AFS International to design an intercultural sensitivity training program called the Intercultural Link Learning Program. Here I broadened my knowledge of experiential learning with Kolb's theory in particular, as well as dimensions of culture which can be used to describe varying spectrums upon which one can identify traits of a particular culture as compared to others.

During that time I also continued to work with AFS-USA. Acting several times as a delegate for the National Volunteer Assembly (NVA) the volunteer-elected governing body of

most volunteer functions, I involved myself in a small part of volunteer governance. In 2013, just after starting my studies with SIT Graduate Institute, I ran for the National Council, a representative group elected by the NVA to work directly with staff, the Board of Directors, and other stakeholders. Ironically, my loss can be partially attributed to one question I was asked as a candidate. “What have you done to address issues of diversity in AFS-USA.” My honest response is one I stand behind today, I had not done anything to directly address these issues.

Later that year the Diversity Committee formed to address the organizational goal of diversifying the volunteer base, which had surfaced at the same mentioned NVA. When asked to join I accepted, barely remembering the question that I had been asked, but knowing that it was necessary work.

### **Diversity and Inclusion Advisory Group (DIAG)**

AFS-USA is a volunteer-driven organization. There are approximately 4,000 volunteers in the US who take on operational responsibilities from support of students both hosted and studying abroad to the delivery of regular orientations, to logistical support, and more. By comparison the staff is approximately 200 strong, handling the more technical and focused details and logistics of running such a large operation. In order to operate, AFS-USA volunteers predominantly look to the above mentioned NVA and National Council, a representative council of volunteers elected by the NVA to liaise with staff and the Board of Directors, for guidance and accountability. (AFS-USA, n.d., AFS-USA Fact Sheet) The DIAG began as a committee working on diversity issues and accountable directly to the NVA. This was a natural place to start, however it was quickly discovered that being accountable to the full NVA meant that we only had an opportunity to modify or propose new action once a year. This is the primary reason

that it took approximately a year and a half of work with the NVA and National Council to shift our role to that of an advisory group, working directly with the executive team.

It was at this time that a shift in the leadership of the group led to my co-chairmanship of the DIAG. There was little we could do in our first year, simply because we had to wait for the next NVA to implement the essential organizational conversion into an advisory group. In that time several people stepped away from the group, and others, myself included, disengaged due to the organizational focus and lack of direct action. Our conference calls had become routine, repetitive, and utterly unengaging. These are the conditions that led to this capstone work.

While most of AFS-USA's national operations take place through the use of various forms of virtual teams, there is not an organized structure or standard approach to how teams are facilitated. One team member has had to leave the DIAG due to incompatible scheduling across time zones. Others are challenged by technology, or even etiquette in virtual communication. Not surprisingly, authors of "Mastering Virtual Teams", Deboarah L. Duarte and Nancy Tennant Snyder, identify two unique challenges to virtual teams: "(1) they cross boundaries related to time, distance (geography), and organization, and (2) they use electronic technological means to communicate (share information) and collaborate (work together to produce a product)" (2006, p. 4). These issues were clearly present in DIAG interactions at this time.

From these challenges Duarte and Snyder have developed seven team types that can be seen most often in a virtual team format. These types are differentiated by composition, intended outcomes, and frequency and duration of collaboration. The types range from Networking virtual teams that are more consultative in their scope, to Action teams that respond in the moment to very specific circumstances. The DIAG is what they consider a "Project/Product Development

Team,” a team that is minimally fluid in membership, and works toward specific goals for the organization the team is a part of (2006, p. 6). This type of team, with the DIAG as an example, is interested and invested in a major piece of organizational management which does not naturally fall in the existing structure. There is little diversity in AFS’ structure, and traditional marketing and recruiting efforts, including a heavy reliance on word-of-mouth, have maintained this homogenous population. The DIAG project development team, to use Duarte and Snyder’s words, exists to consider ways in which organizational culture can shift, and word-of-mouth recruitment efforts can diversify. The interest here, however is in the complexity of managing and organizing a virtual team for the purpose of a workshop which would normally be set in an in-person context

With context, purpose, goals, and objectives, it is now possible to consider the actual design of the project. For this, the theoretical models on which the project stood, experientially based learning and virtual team organization and structure, must be explored.

### **Participatory Practices and AFS-USA**

In her chapter considering the future of organizational structure and workflow, Peggy Holman identifies one benefit of the type of participatory change process she and her co-authors compiled in “The Change Handbook: Second Edition” “Paradoxically, as people follow their own call, a new sense of connection to each other surfaces. Differences seem less divisive, more beneficial.” (Holman, P., 2007, p. 612). With so much focus on organizational placement, DIAG meetings ran through agenda items in a structured and orderly manner, even developing a variety of small projects, but lacked true interaction or engagement on the issues some members of our organization face. In Kolb’s terms, we had spent a lot of time in the stage of Specialization

(2015, p. 133). In today's society any group working in the realm of diversity and inclusion is a group working toward change. The important work of structure the DIAG had worked on for so long seemed to be blocking the type of action that likely draws people to do this work, where they can connect with their individual interests and styles, and still develop and experiment with new ones. Again, diversity of experience, according to experiential learning theory, is a requirement for learning. In an organization that values learning through individual immersive experience, the workshop was served by a participatory framework that embodies the type of inclusive change sought.

Holman, Devane, and Cady identify the following common elements between the methods suggested in "The Change Handbook"

- "Contributing to a meaningful purpose compels people into action.
- The power of individual contribution is unleashed.
- The whole person, head, heart, and spirit, is engaged.
- Knowledge and wisdom exist in the people in the organization or community.
- Information is co-created by members of the organization or community.
- The method creates a whole system view among members of the organization or community.
- Change is a process, not an event" (Holman, P., Devane, T., & Cady, S., 2007, p. 12)

These values and practices intend full participation in the desired setting. Change that comes to an organization using these guiding values does so by lowering barriers for someone to express, for example, that they feel harmed or targeted by an accepted practice. This might be addressed by the previously mentioned Bias Response Policy. If the DIAG were able to agree upon a similar list of values to go forward as changemakers in the organization, those values could move the group and the organization in a direction of removing barriers where they are not absolutely necessary and engaging on more grounded terms. From this it may even prove



possible to find interventions and projects for the DIAG while furthering our structural placement. The first two stages of the workshop were simply dedicated to making connections, getting to know one another, and engaging with issues that more diverse communities experience. By pairing participants to prompt each other on their wiki profile questions, they were able to engage with someone else on experiences that had brought them to do this work.

In “Participatory Practices in Adult Education,” Barbara Burnaby, also one of the book’s lead editors, states “Social wisdom is perhaps in knowing when to let the initiative come from the group and when to insert catalysts from outside” (2001, p. 311). Within the context of the virtual strategic planning workshop, this became a line that, as a practitioner, I considered carefully. One of the primary challenges to the workshop’s continuation was low engagement due to time constraints. Volunteers and staff within AFS-USA are overwhelmed with work, and this limits the ability to coordinate full group activities outside of regularly scheduled meetings. I do not believe I was able to overcome this challenge. Participant engagement remained low. One group member, for personal reasons, had stepped away for a while without our knowledge, others had competing priorities over the six-week workshop, and were unable to fully engage in activities. Therefore, as the facilitator of the project, I had to modify options for individual participation where there was a prompt for group or pair work and shift expectations considering the lack of full group engagement. Activities which led to decisions impacting the team were modified to set up that eventual discussion so that participants who could engage were able to do so, and participants who were not still had an opportunity to provide input.

As the design for the DIAG strategic planning developed, the values of participatory practices informed the nature of the activities. I was very aware of the fact that, as a virtual team,

group dynamics would surface entirely differently. Where traditional workshop formats consider group dynamics within a physical space, this workshop design developed around the setup and execution of a digital and virtual space. Some things are easier virtually, such as room setup and planning for physical comforts, but concerns otherwise not considered such as file naming structures, technological accessibility, technical skills, etc. open a whole set of considerations never planned for in the 1970s and '80s when Kolb first developed his theory. An example of this is the activity I consider to have been the highest risk. I created a Google Spreadsheets wherein participants were invited to contribute social justice and identity vocabulary and definitions as they understood them based on experience. As a virtual trainer I considered the setup of the spreadsheet much in the way I would consider room setup in person. Google Spreadsheets provide the ability to set up permissions for each column. In an in-person setup I could provide space for each individual to work on a flip chart paper and replicate something similar, however the Spreadsheet, acting as our virtual space, had to be set up so that participants knew that their words were represented as they contributed them, and that they had ownership and accountability to what they suggested. I locked permissions so that participants could only contribute to the column assigned to them in order to provide this empowerment and accountability.

Added to the intrinsic challenges of virtual interaction is the consideration as to whether experiential learning theory is even appropriate to apply to an organizational planning structure. According to Kolb, "Learning is the process whereby knowledge is created through the transformation of experience." The author argues that those moments in life that require adaptation or flexibility, particularly moments of developmental shift, are specific moments of learning. Kolb's experiential learning cycle and learning styles should, therefore, be able to

inform group or team structural decisions in order to consider and reasonably accommodate different styles as appropriate. (2015, p. 49)

Kolb argues that since individuals are constantly developing and adapting to internal and external stimuli, learning styles significantly indicate how people might react within their environment. Since development does not stop at the brink of adulthood, individual learning styles continue to impact our lives. At different stages in adult development the relationship to one's own learning style can even shift dramatically wanting to stretch boundaries, or stay within their comfort zones (2015, p. 52). Having established that Kolb's theory allows for the consideration of learning styles in a team setting, the traits of each style provide information to work with in a strategic planning workshop design. Kolb discusses the complexity of learning environments in more detail:

- “Affectively complex learning environments are ones in which the emphasis is on experiencing what it is actually like to be a professional in the field under study.”
- “Perceptually complex learning environments are ones in which the primary goal is to understand something: to be able to identify relationships between concepts, to be able to define problems for investigation, [...] and the like.”
- Symbolically complex learning environments are ones in which the learner is involved in trying to solve a problem for which there is usually a right answer or a best solution”.
- Behaviorally complex learning environments are those in which the emphasis is upon actively applying knowledge or skills to a practical problem.” (2015, pp. 277-278).

Developmentally, these environments correspond to the extremes of the two dimensions that make up Kolb's Experiential Learning theory: active (behavioral)/reflective (perceptual) and

abstractness (symbolic)/concreteness (affective) (2015, p. 134). A given learning style will be most compatible with the corresponding two dimensional environments. For example, in a context high in abstract conceptualization and active experimentation, a “converger” according to Kolb, is likely to respond to behaviorally and symbolically complex environments.

Diversity of learning styles, the manner in which one can receive and engage with the learning process, is key to experiential learning as described by David Kolb in “Experiential Learning: Experience as the Source of Learning and Development” (2015). The below sections represent each of Kolb’s four learning styles. They detail challenges and opportunities for each learning style specific to working on a virtual team. Additionally, there are observations on the advantages brought to the group by representation from each learning style.

#### *Divergers – Concrete Experience and Reflective Observation*

This learner values above all the lived experience of learning. On a team such as the DIAG the presence of someone fitting into the diverger learning style provides an opportunity to generate a wealth of solutions to organizational challenges with regards to diversity and inclusion. As learners based in concrete experience, but envisioning the implications of that experience, this learner is ideally placed on a team seeking to help voice the needs of those who are unrepresented, or underrepresented in the general AFS-USA community. The DIAG is looking to change the face of AFS-USA to represent the United States more fully and inclusively. The divergers of the team have an opportunity to remind others of this fact. Someone who prefers a divergent learning style can effectively communicate that we are working toward the needs of real people. They may be particularly focused on the experiences of those people, how they are impacted, and what might be done to address those needs. This learner may not

have as much interest, however in drawing many conclusions from the experience. The field of diversity includes a part of nearly every aspect of human social experience, so the diverger might rather focus on including more and more when specificity or focus are needed for a specific task.

The DIAG is addressing issues which affect our stakeholders' day to day lives, and that is going to be very important to the diverger. Conference calls and webinars are likely to challenge divergers who may linger with the perspectives of those who live what we are trying to support and what impact that experience has. Where feelings, ambiguity, reflection, and inclusiveness of many perspectives are prioritized by the diverger, hour-long monthly calls are not ideally situated for thorough consideration. Now that we have completed a big first step toward planning and organization, it is important to open this back up with the experiences we are connecting to. This might look like a document to chronicle substantive stories of diverse AFS volunteers and staff, community engagement over social media, or may involve efforts to expand the group. As more group members are brought in, more experiences are shared, and more opportunities arise to share and work from them.

#### *Assimilators – Reflective Observation and Abstract Conceptualization*

Assimilators will run with the experiences brought to them by divergers and extrapolate meaning. Where their cyclical predecessors care to focus on the experience and reflect on what happened, assimilators want to know what happened, why, and what it means. Assimilation of the experience is essential to the learning process. Without abstract reflection, learners are simply 'spinning wheels in mud' about experiences that they have had. This can be a difficult and risky place without assimilators to begin shifting a discussion from "What?" to "So, what?"

Though all participants ideally go through the full learning cycle, the assimilator learning style describes someone who will work with the ideas generated by the diverger and pull them together. On the DIAG, this can be a huge service. While we have made steps organizationally to respond to specific incidents of bias, the advisory group is organizationally placed to be as proactive as reactive. The assimilator can take concrete experiences within the organization and demonstrate trends that we can consider and respond at an appropriate level.

Monthly calls and screen exchange are less of a concern to the assimilator as a means for communication. An hour spent on varied topics certainly plays to the assimilator's strengths as someone who can take in a large amount of information. If anything there is not enough time to consider so much information within our current communication structure. Structural consideration around how overflow information is handled in calls will alleviate some of this, however to move away from consideration to accommodation, it will be worth looking for tasks and resources that specifically deal with bringing data together. One sub-group of a DIAG project focuses on analysis of incoming data, which might be a perfect placement for the assimilators of the team.

Perhaps the most exciting prospect for the assimilators on the DIAG is that we are working in the field of diversity, which includes many academic fields of study (women's studies, black studies, queer theory, etc.) and the group will be faced with the concept of intersectionality, wherein a person carries with them multiple oppressed and privileged identities. To assimilators who concern themselves less with concrete experience, the theories behind all of these experiences provide nearly endless opportunities. With support to bring theory into practice, this team will benefit greatly from an assimilator's perspective.

*Convergers – Abstract Conceptualization and Active Experimentation*

With the Experiential Learning Cycle designed as it is across two dimensions, it becomes necessary transition from thought to action. This does not necessarily mean a form of concrete experience though. Convergers prefer to take the question of “So, what?” further, by considering how the conclusions drawn from the earlier lived experience can be applied more broadly. As the learning process moves in this direction it is often helpful to draw in external information. Similar experiences can be shared and theories can be introduced to help learners draw broader conclusions from the experiences they share. Someone who prefers this style would be able to contribute to that social wisdom Barbara Burnaby referred to before in navigating internal and external initiative. Because this is the point where the learning process broadens to include concepts external to the immediate learning process, convergers are more focused on the theories than the people and can seem less social, but these learners can draw implications from the group experience that introduce life lessons.

Where the diverger could generate plenty of concepts for our group to consider, someone who can be described as a converger is the one who will best be able to draw plans from our research. As the DIAG begins to understand the data that comes from demographic surveys, team research, anecdotal input, etc. it will likely fall to the convergers, most comfortable putting action to abstract concepts, to lead planning possible interventions on behalf of the team. These are steps still to come for our group as separate efforts to expand the group will soon occur, and project planning will also be an inclusive process for those who take various projects on.

Of any of the four learning styles, I expect the least difficulty in the virtual team format for convergers. Convergers are self-starters who enjoy taking risks, but base themselves solidly

in the “how” of what they are doing. These will be strong members of the DIAG, possibly even leaders who can bridge the divide between theory and practice.

*Accommodators – Active Experimentation and Concrete Experience*

After all this thinking, processing, planning and experimenting, there are learners who just want to ‘do’. These are likely some of the most frustrated learners simply because, as stated above, starting more often than not with divergers means ending with accommodators. The benefit for the accommodator, however, is that at this point in the learning cycle there is information with which to just start working. If a group ends on this cycle, then, according to the theory, there is nothing left to do but put the thought experiments of the convergers into action. Accommodators are seeking out the experience of the diverger, but these learners benefit from the full process that lays before as it provides information to the learner enabling them to take action. This is not to say the accommodator necessarily seeks out the reflection and processing that comes before, and this learner can get caught acting impulsively without the abstract concepts to inform them.

An hour long phone call during which the team takes turns talking is unlikely to be a strength of someone who learns best as an accommodator. There will be a need for balance in team communication so that those who need time to reflect, have it, and those like the accommodators who are very connected to the moment at hand, do not feel their time is being wasted with talk. As the DIAG grows, we may have need of Action Teams similar to those discussed by Duarte and Snyder. They discuss a virtual team model very well suited to the accommodators of the group, the most likely to jump up and take action at a moment’s notice.



Now that the group has come up with some project concepts, there are opportunities to move into action. The group of volunteers who demonstrated interest in our efforts have been considered a strong pool from which to draw new recruits, and the accommodators of the current group are likely well positioned to bring them up to speed and get them involved. As a learner who prioritizes and benefits from action the accommodator is also likely to be drawn to such things as school presentations and attending volunteer conferences in order to deliver content the group is able to develop and the work the team is doing.

### **DIAG Strategic Planning Virtual Workshop**

In designing the workshop, I wanted to stay as close to Kolb's model as possible. This is the familiar model for AFS, it is familiar to me, and with the opportunity to use these theories to work with the DIAG, I knew I could go deeper with it. The variables under consideration for the purposes of this capstone, particularly working with a virtual team and outside of a strictly 'learning' setting, had to do with format and delivery rather than the experience itself. For this reason, participants did not contribute directly to the capstone research, but provided an opportunity for me to incorporate elements of experiential learning into this rare setting. The purpose of the workshop has been clearly stated: the DIAG needed direction. And resources. Kolb's model was chosen to inform the format of the workshop, a needs assessment had been made, and all that remained was design of the workshop.

The design for the DIAG Strategic Planning Virtual Workshop included seven activities circling Kolb's learning cycle. Most activities are detailed below as they apply to the specific learning styles of the cycle and the full design is provided in *Appendix A*. As is common practice, I began the workshop in the learning space of divergers and moved on from there.

*Engaging Divergers Virtually*

One of the primary resources our group has endeavored to institute for well over a year is a stronger presence in the AFS Wiki. Specifically, the DIAG would like to lay out the guidelines for applying to be a member of the group, show a high level view of the work we do, and tell the organization a bit about who we all are. Going into this workshop, the application process was already being addressed by the other co-chair of the group and another member, and without major projects to demonstrate on the site, the other major wiki element was the profiles of group members. There are ways to adapt this need into an activity for most of the learning styles, but it struck me as a perfect way to approach divergers. We needed to reintroduce ourselves to each other and to the organization. For this activity, participants were paired off and asked to discuss with one another what motivated them to join the DIAG, their experience with AFS, and in the spirit of respecting the internet as the medium with which the workshop was conducted I added a “meme” activity wherein one came up with a “DIAG name” based on combinations of the place where participants call home, their travels, and their inspiration for doing work in diversity.

Activities typically designed for divergers had seemed to me to be focused on creating an experience from which to begin the experiential learning cycle. The practice involves a designed or adapted concrete experience upon which participants can reflect and discuss. The activity itself must, of course, cycle through the experiential learning cycle, but the focus of an activity at this stage has to do with the concrete experience. For a virtual team project I had to focus more on the reflective observation aspect of the diverger’s learning style.

Participants were asked to discuss the experiences that led them to AFS and to the DIAG within AFS. In communicating directly with one another one-on-one about these experiences,

participants were able to connect with one another and begin to brainstorm what it really means for each participant to be a member of the DIAG. With the activity came a form, and during, or after the discussion participants were asked to fill out their own profile based on their discussion. I did originally consider having them filled out by the partner, to be edited by the person, but decided that this invited an opportunity for misunderstanding in a virtual setting. Differing communication styles and manners of interacting, not to mention cultural differences, as it is a diverse group, led me to the decision to have participants fill out their own profiles.

In the process of completing these profiles we began to address the goals and purpose of the activity. These conversations were extremely beneficial to some participants based on feedback, however others were unable to connect with their partners, or chose not to, and filled out the form without the conversation. The reasons for this had more to do with external circumstances, but indicates a trend that continued throughout the workshop. The very reasons that an in-person workshop was never a possibility, budget, time, and an excess of work for all of our members, impacted the ability to engage with the workshop for some. While this could be discouraging, it also demonstrates an opportunity for flexible design. Individual activities can be as experiential as group activities, individual option designs, when possible, allow for deeper participation for those with limits.

### *Engaging Assimilators Virtually*

In theory assimilators had many opportunities to draw from lived experiences within the group. In fact, the Wiki Profile Activity is one that an enthusiastic assimilator could respond to directly from their preferred learning style, as it emphasizes reflective observation. This would be different from the diverger's response in that the response would focus more on the

implications and conclusions drawn from past experiences rather than the experiences themselves.

The Language Activity was the one intended for the assimilators. In this activity participants draw from their own experiences and share personal definitions for vocabulary relevant to the subject matter, in this case, within the realm of diversity and inclusion. Participants contributed vocabulary and personal definitions to a shared spreadsheet. The personal nature of the definitions is an effective one as it demonstrates the group's shared vocabulary and comfort communicating about various identities and experiences with which they were familiar enough to speak with a level of awareness or authority. Each column was digitally locked to individual input so that participants were unable to edit one another's responses. Unfortunately, it became clear throughout the program that this activity was not one in which participants were engaging, despite many prompts and examples provided. Considering the activity in retrospect, I believe it to have been much more high risk than I expected it to be. Even with the protections to personal identity detailed above, this is one area where I believe the chosen technology was not ideal. The prompts for this activity were general in order to generate a broad list of terms and vocabulary, but even in contributing my own definitions, I felt a sense of vulnerability both at speaking to my own identities and experiences, and on behalf of communities I have experience with where it felt appropriate. The activity itself has not received feedback through personal messages or evaluations, however this is one of the two primary activities that demonstrated very low engagement.

My primary learning style is that of a diverger, and I believe that this may have been involved in the challenge for me to develop or adapt an activity focused on assimilation. The

Language Activity, while applicable to assimilators, does not specifically address the preference of the assimilator to develop some depth from concrete or structured experience. The timeframe for this rather involved language activity also lasted the whole workshop so that people had time to engage with it, but I believe this further separated it from the rest of the workshop, and made it an activity that people had great difficulty engaging with. To modify this, I believe I would incorporate an interpersonal piece to the activity. Rather than starting with, and filling out a spreadsheet, I might consider something similar to the Wiki Profile Activity, where perhaps a group of two to four have opportunities throughout the time of the activity to talk through language they would like to share. Technologically I would want to find more engaging and user-friendly software, but software that maintains the parameters of permissions to protect participant input.

### *Engaging Convergents Virtually*

Where the assimilators lacked some specific attention, the convergers had an activity planned specifically with them in mind. In the What Works? Activity participants were asked to review the online presence of one or more groups that have enacted significant change within their own contexts. I provided profiles for three movements varied in size, impact, and subject matter. The first a policy organization called *A Movement for Black Lives*, a policy-focused branch of the growing *Black Lives Matter* movement. The second, the *Human Rights Campaign*, was a driving organization in the push for Marriage Equality in the United States. Finally, a group within AFS-USA, now called *Returnee Relations* sought to engage participants like myself who have studied with AFS and returned home. (see Appendix A –What Works?). Each initiative demonstrated was an example of an area of concern that had been identified in the needs assessment for the workshop. Here was an activity that was suited to the intended learning

style. As mentioned above, convergers like to focus on broadening the discussion of lived experience in order to draw constructive conclusions for experimentation. Again, I can also identify the unclear nature of the Language Activity as far as experiential learning is concerned. This activity could easily appeal to this group more than others, because the experiences of the participants are built upon to create a broader resource for the group, and potentially for AFS-USA as a whole.

Participants were discouraged in this activity to draw from any values or direct actions demonstrated by the other organizations, and asked to focus instead on how these organizations demonstrated and practiced their values. This prompt proved confusing to some participants, but by and large people came to intended understanding. The prompt was written to avoid the word “appropriation” which I have seen cause defensiveness which can block continued engagement, but I realized now that these instructions could have been more clear. (I now question the appropriateness of even avoiding this term so long as it contributes to a successful and engaging activity.) It felt important to make this distinction, however the climate around such distinctions is one that constantly shifts, and I now feel that very clear instructions as to what constructive observations were welcome in the activity would have benefitted those who experienced some confusion.

The use of the organization *A Movement for Black Lives* as one of the examples of where we risked “appropriation.” Our smaller group in the DIAG is diverse and knowledgeable of social justice values for the most part, and may be able to draw some deeper inspiration from a movement such as *A Movement for Black Lives*. AFS-USA, however, is a predominantly white organization, and it is inappropriate to adopt any work directly from an organization focused on

issues for communities of color on behalf of AFS-USA. The social media marketing, hashtags, designs, etc., cannot be the focus of researching A Movement for Black Lives, since everything is owned by that movement. It is up to AFS-USA and the DIAG to learn what marketing techniques will make AFS-USA a successful racially, and ethnically diverse organization. Someone who prefers the converger learning style may get caught up by this logic though. As the conversation broadens, restraint is necessary in order to keep respect for the work other organizations and communities have done, and it might feel perfectly natural for the converger to view similar values between AFS and another organization and want to work with techniques that are already successful.

In this vein, it can be noted, the title of the activity can mislead. It is not that “What Works?” is not an appropriate question to ask when researching an organization and its stated values versus demonstrated values, but this question invited participants to consider and scrutinize the actions of these organizations just as much as it did the organization’s accountability to its own values. The activity did inspire much positive feedback, and participants appreciated exposure to the efforts of organizations and movements with demonstrable experience in enacting change.

#### *Engaging Accommodators Virtually*

At the conclusion of the workshop, the various pieces did come together in two activities which would address the needs of the accommodators. Moving back into the space of concrete experience, the nature of the virtual team again influenced how to approach this, and again the emphasis went to the trait of the neighboring dimensions.

The first activity was the development of a Mission Statement. With the group's own lived experiences, processing, and external input, we were able to crowdsource language and concepts for a mission statement. In the form of a three-stage survey, participants drew from current AFS literature addressing diversity and inclusion, their reflections on the organization(s) researched in the What Works? Activity, and their own personal experience. From these varied sources we drew language that we knew should be in our mission statement, and other language we felt already existed satisfactorily in other places in the AFS web presence. Due to varied levels of engagement and scheduling this activity closed as a language development activity and the full decision on the mission statement was put off until a full meeting of the group. This did not disrupt the ability to develop a strong understanding of how the group began to focus in on specific language to describe our intentions in working within AFS-USA.

Considering that a primary motivation for this work came from the fact that the group was focusing more on structure than action, it was important that assimilators be able to work with more than the Mission Statement Activity which really existed right on the line of active experimentation. To meet this need we had a Framework and Project Planning Activity. Convergers and accommodators would likely both be comfortable with this activity. Modifying the original design due to one wayward activity's failure to launch, which will be addressed below, resulted in ending up with two stages. Each participant was sent a suggestion or idea that emerged from the needs assessment and asked to respond with reactions and considerations about what the DIAG might want to know in order to implement the suggestion. After these were all shared, I combined the common considerations among the responses to create a form for future DIAG actions. I saved the form to a shared online storage and then saved a copy for each idea or suggestion that was considered. Participants were invited to flesh out any ideas with



consideration for implementing. This again is a concrete resource developed for the group, which awaits full group approval in order to be officially implemented, but participants are now able to suggest activities having considered some primary concerns that exist in the group.

Accommodators likely will emerge to take up the final request of the workshop, which is leadership for these projects. As we incorporate new members, these members will need guidance, and accommodators will likely appreciate the opportunity to work with newcomers while implementing all of the work we have just completed.

#### *The Chain Letter That Never Was*

One activity which can be found in the design, but not described above is the Chain Letter. Here, again in the spirit of respecting the medium of the workshop, I wrote a chain letter, one of the first analog concepts to make its way to the internet. The nature of the activity suited the need very well, as it was to be used in the phase of the cycle between abstract conceptualization and active experimentation, which allows for considering the application of the experiences and values emerging thus far in the workshop. The concept was to present an idea or suggestion from the needs assessment in order to elicit, not approval or rejection, but rather questions regarding how these ideas or suggestions might be implemented. As the chain letter passed along, participants would be encouraged to build upon previous recipients' questions and contribute their own. The objective here would have been to develop the framework for project consideration.

At the point that this activity started, participants had provided feedback through a mid-workshop check-in that the pace was too intense. It was no surprise to me, therefore, when I checked in with the first participant to find that there had not been time to read the activity, let

alone respond or forward it along. Given group feedback and the fact that only one person had begun the project, I made the decision to shift this activity to the beginning of the next section, making the project planning activity two phases stripping the “chain letter” theme of it, and presenting suggestions and ideas more directly for questions and consideration. This allowed for a week “break” from the workshop, and it certainly helped participants catch up, particularly with the What Works? Activity, which was predominantly self-guided and led to the Mission Statement which was to run concurrently with the Chain Letter Activity. It required very little adaptation of this concept to incorporate it into the Framework and Project Planning Activity.

The removal of this activity did not erode the path around the learning cycle, as there were multiple activities addressing this part of the cycle, and the more direct instructions allowed participants to understand the input that was being requested much better.

### **Outcomes, Highlights, and Challenges**

I am proud to say that despite challenges in participants’ ability to fully engage, participant feedback has been very positive toward the design of the workshop, and the group is excited about the outcomes and feels more capable of moving forward collectively. The core premise of the concept of a Virtual Strategic Planning Workshop is one that questions engagement. I would describe the path through theory for participants to have been stronger than the orientations I first helped deliver, but falling short of a full experiential process. However, our purpose, goals, and objectives were all addressed and engaged with by the group in ways that led to motivating outcomes, stronger relationships, and a clearer vision of what is to come. Participants have specifically called attention to the fact that they are better informed about issues of diversity and inclusion, particularly how that work is done. Additionally, the increased,

and more personal interaction was appreciated and created unexpected connections. I can personally say that I was able to make surprising connections via the needs assessment phase, in which I sent a survey and performed interviews with current members. It was a pleasure to find out that, though participants often agreed that action was needed, they also had strong ideas on what to do. In finalizing the design with those interactions in mind, I tried to create as many opportunities for the group to work with one another as possible. While we never fully overcame the challenge of engagement, it is clear that we are not only better prepared to take on new projects, and have some ready, but also that the group is much more united in how we will move forward.

Another highlight would have to be the availability of technology. For the most part the technology used was basic software familiar to this group. It was interesting to note, well into the implementation of the workshop, that I did not incorporate any social media. I have previously worked customer support with customers whose experience with computers is limited, and I learned to focus on the most accessible software available when possible. This workshop was run through email and the phone as these have always been the group's primary means of communication. Despite the lack of social media, it was fairly consistent that there was little challenge in finding online technology to implement activities. Most notable here would be the Card Sorting Activity, an activity in which participants were asked to categorize different ideas and suggestions based on various factors, such as impact, workload, mission appropriateness, etc.. It did take some research to find software that allowed free use with the parameters needed for this group, but some simple modification to the format of the activity allowed use of this software to replicate an effective in-person activity. This activity was not mentioned above as it

was less experiential and more functional to the resource goals of the workshop, however this was not technology I anticipated being so readily available.

### **Feedback, Insights, and Learnings**

Facilitation of this workshop received mixed reviews. Overall the workshop went smoothly, and I managed to communicate directly with each participant individually in order to check in however the initial workshop setup was seen as abrupt. It was not until requested that I realized I had not prepared an outline of the workshop for participants in order to set expectations around time commitments and the overall flow. It is simple enough to consider that the academic requirements to introduce the work seemed to me to set the stage, I certainly had a clear understanding of what was going to happen, and attempted to communicate this through the proposal to the group, but this explanation falls short. In reality, in respect to people's learning and organizational styles, it is necessary to explain the process and the specific expectations of them. Following this request, I did provide a workshop outline and participant feedback improved dramatically.

The inability of some members to fully engage in each activity is a hurdle all trainers confront at some point, however in this context some participants are volunteers and others are staff. Staff members in particular had a very difficult time of it, often having to extend work hours in order to participate. This is standard operation for AFS-USA, where funding is limited enough that staff often have to take on multiple responsibilities, however it does pose a challenge to scheduling and group dynamics when this happens. For this reason, though interpersonal interaction helps with teambuilding, activities had to be such that participants could schedule themselves as much as possible. Pairs were given the opportunity to make their own scheduling

arrangements, and where full group debrief was necessary, it was scheduled as much as possible to occur during the two regularly scheduled team meetings in order to limit the need to coordinate schedules for supplementary participation.

Technology, ever the double-edged sword, was as much a challenge as a highlight. Despite my professed ability to identify simple software choices, my experience in giving instructions for the use of technology did not surface in the way I would have liked. At this point in time, it is equally important to explain unfamiliar technology thoroughly. Here again, innate assumptions on my part simplified instructions to the point that the technology became confusing for some participants. It was typically the case that, by the time I received this feedback, participants would have figured this out, however it was presented as a strong challenge. The challenge did not hinder participation, in fact those providing the feedback were very engaged with activities once figured out. Here too, the Card Sorting Activity serves as the best example. A “net-native” would intuitively work with an online card sorting activity fairly fluidly, however this is still not a majority experience, and if it were, there would still be a likelihood of participants needing thorough instructions.

As intended, this experience taught me much about what it is to implement experiential training techniques in a unique setting of growing importance. Where theory is concerned, this rare implementation of the experiential learning cycle allowed me to consider the less traditional approaches to the design. I believe that if I were to return to this design and make any adjustments, a primary shift would be the point at which I entered the cycle in order to get started. To start with diverging is acceptable, and common in training in order to establish quick shared experience from which to begin. However, I do wonder if it would have been beneficial to consider beginning this project from a converger’s standpoint, perhaps. In doing this, the group

could have begun researching the industry of diversity work, how it is implemented, and continued through the stages. The cycle would go just as smoothly, introducing ideas and concepts the entire group might not have considered in our work thus far. In fact, feedback spiked positive when we reached this stage of the cycle. With external input and some experimentation, we could move through concrete experience, perhaps designing some hypothetical projects, and then move through the process of assessing what works and what doesn't specifically for the group at hand.

Debriefing is another area in which training based in experiential learning is necessary. Debriefs of workshop activities varied in their effectiveness, and the debrief process is probably the most difficult to address remotely. The workshop design did allow for scheduling activities around previously scheduled meetings, however again logistical preparation would have benefitted the group's ability to debrief the experiences throughout the workshop. Debrief conversations were often short and did not go as deep as I have seen in the past. This is where social media inclusion might have been a consideration to include. With a common space to communicate, interpersonal engagement at the group level may have opened up more than participants did in this case. Participants were still able to teambuild, process activities, and work through the workshop, however debriefing activities are essential to experiential learning. I do not believe that participants had the opportunity to enrich their experiences in a way that one can when processing reflectively no matter our outcomes.

Kolb's dimensions are often discussed as a flat cycle. I have explored above the three-dimensionality of the theory that often goes unaddressed, however there is also merit in considering the individual one-dimensional elements of the theory. Each of the two dimensions

that make up the structure of the cycle has an intrinsically different trait than the other. The dimension that includes concrete experience and abstract conceptualization is focused on external input or stimulus of some sort. It is possible to have a completely internal concrete experience, and certainly it is possible to conceptualize abstractly within one's own head, however for the purposes of an experiential learning cycle, this dimension most often requires that these stimuli come externally. Linguistically these are both noun-based terms, meaning that the focus is on the experience or the abstract concept. For the purposes of this workshop design this observation helped me to consider how to implement various learning styles. My skills and experience as a trainer in virtual setting are new, and this context was challenge enough. Rather than develop or modify a structured activity to address those features of the diverger that appreciate structured experience, I asked this uncharacteristically diverse group of AFSers to reflect upon their lived experiences as concrete ways to inform the initial activities. I chose to focus on the aspects of the dimension that includes reflective observation and active experimentation which have to do with action. Much more of the participation occurs internally. One who is reflecting can still have an external focus, but the work and activity that is happening in that space is happening within one's head. Similarly, one who is actively experimenting is very likely acting as the stimulus to cause some sort of activity or change, but it is based on building experiences and processes and develops from one's interpretation of that background.

The realization of the nature of the two dimensions was incredibly helpful to consider where my focus needed to lie within any given activity. As previously stated, when designing the first activity, it was clear that the DIAG needed to reconnect, so the focus here was on the action of reflecting upon personal lived experiences that brought them to this work, to reconnect with the work we are doing, and to begin to develop a mindset of future action.

Two “net-native “concepts that I found very useful in the collection of data were those of “crowdsourcing” and the term “tl;dr”. Crowdsourcing as a general concept is not new to training. Many activities are designed with the intention to gather individual input to contribute to a group’s final product, however the concept of crowdsourcing as I have experienced and implemented it, is one that includes a stronger social meaning and a connection to the specific moment. Economically, this philosophy has been adopted with huge success in the form of crowdfunding websites such as Kickstarter and Patreon. Those activities where participants’ brief input contributes to a larger whole, whether as a teambuilding activity, a problem solving activity, or, in the case of this workshop, an activity to develop language for a mission statement, crowdsourcing facilitated as a quick, energetic, and significant experience can be very effective.

“TL;DR” is a statement that translates to “Too Long; Didn’t Read”, and began as a ‘snarky’ response to people who expressed themselves voluminously in social media circles. Soon, these same people began prefacing such long expressions with “tl;dr” accompanied by a brief explanation of the subsequent wordy post. I am one of those people. I have difficulty writing emails which do not include everything from ancient historical data on the topic at hand to the far reaching potential implications. I found it useful to provide a brief summary of the email using this term so that participants could get a snapshot of what was to come, where to set their expectations, and whether to choose engagement or return to the email at a more convenient time.

## **Conclusion**

AFS-USA has a long history. We are the current US-based iteration of the organization originally called American Field Service. Coming out of World War I and World War II,



volunteer ambulance drivers formed a cultural exchange organization facilitating exchanges with youth between families of former ‘enemy-countries’. The theory of these former volunteers held that the youth had the opportunity to experience life in the culture of those they opposed, and with this opportunity, they would open their minds and hearts to their hopefully former enemies. 101 years after the group first formed to provide medical assistance in the war, the organization has a larger scope and presence than any of them likely thought possible. AFS now implements academic theories of experiential learning, some of which developed out of, if not directly from, the types of experiences the organization helped to create. Their theory is still being put into practice, and AFSers believe that enough people with this type of experience will soften tensions as global society becomes more culturally literate (AFS-USA, n.d., AFS: A Brief History).

I have greatly appreciated the opportunity to draw from my SIT studies to advance the very important work that the DIAG has to do. AFS experiences are unavailable to many people in this world who see their options ebb and flow depending upon others’ decisions. I look forward to working with the DIAG to continue to build the work we do with AFS-USA from here, as well as further opportunities to explore what it is to facilitate in a virtual space. In 2016 Virtual Reality took a profound step forward. At the time of this writing, a pair of soon-to-be-released VR goggles is on its postal journey to my mailbox. It could be that in five years I am using those goggles to deliver the 4.0 version of this very training hopefully to a group with as many stories and ways to share them as there are participants.

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## Appendix A – Workshop Design – DIAG Strategic Planning Virtual Workshop

### Section I – Teambuilding and Resources

#### Activity: Wiki Profile

1. Time –
  - Time for activity completion: 3-5 days.
  - Total time for activity: 2 hours.
  - Total call time 45-60 minutes.
2. Overview – In this activity participants will work with one another to generate personal profiles to be posted on the AFS Wiki. These profiles will include basic personal information, contact information if desired, and some brief information on the person's AFS background as well as their reasons for working with the DIAG.
3. Purpose – Using the opportunity to build the group wiki, participants will profile one another for wiki profiles and begin to reflect on their motivations to join the DIAG and their aspirations for the group and for AFS-USA.
4. Goals –
  - Generate full member profiles for every DIAG member.
  - Increased familiarity between DIAG members.
  - Reflection on scope and possibilities for DIAG
5. Objectives –
  - Teambuilding
  - Resource Development
  - Reflection on Advisory Group
6. Technology Requirements –
  - Telephone
  - Active Email Account
  - PDF Viewer
  - Online/Video chat software (optional)
  - Digital Camera or Camera-Enabled Device (optional)
7. Documentation –
  - Introductory Email:

It has been a while since our group synced up to remember what we've all done in the world outside of AFS that drives us to focus a part of our work with AFS on developing the organization to be more diverse and inclusive.

Now that our main wiki presence is updated, we'll take the need for member profiles as an opportunity to reflect upon the work we're doing, and where we want it to go.

Please take some time to have a conversation with one another to get to know each other better. This is a conversation that will help us know one another and work together better on this team, so keep your responses within your comfort zone, including passing if that's what feels right. The first

page of the attached form is provided with some guiding questions. Try to work your way through these questions before you move to the next page.

When your conversation concludes, take turns filling out the wiki profile on the other side of the form. Use your notes from the conversation to talk through anything listed in the profile form. When both are happy you're your profiles, close your call sharing with one another something you're looking forward to in the next week.

I expect this conversation to take somewhere around an hour. Your call is scheduled for TIME; I'll be available from now until TIME (2 HRS AFTER CALL TIME). Feel free to contact me by the following methods:

Instructions on follow up from this activity can be found at the end of the attached document.

o Activity Form

Page 1: Conversation guide:

Please hold a conversation guided by the following questions. Know that you will fill out your own Wiki Profile, and all information is voluntary and will simply not be shown if left blank.

- i. What do you prefer people to call you?
- ii. How long have you been involved with AFS?
- iii. What made you join the DIAG?
- iv. What do you notice about people who are missing from, AFS, DIAG, your area team, etc.?
- v. Do you have an active presence in other communities or organizations that share traits with DIAG or AFS work? Please share
- vi. Does anyone in particular inspire or inform the work you do in diversity and inclusion efforts?
- vii. What has the DIAG done that you are proudest of?/What is something you've always wanted to do with the DIAG?

Page 2: Wiki Profile (Blank spaces will be left out of online profile

- Preferred Name –
- Gender Pronouns –
- Area Team –
- Length of AFS Involvement –
- Brief AFS Story –
- Why is the DIAG important? –
- I bring AFS and the DIAG my experience with –

- I draw inspiration from –

Now polish your profile and send this information either scanned, photographed, or typed up to [diversity@afsusa.org](mailto:diversity@afsusa.org) in the next 48 hours. These will become the public profiles on the [Diversity Committee bios](#) page on AFSWiki. If you prefer for this information not to be used in this way, fill out the form for yourself and reflect upon the conversation and prompts on the form. We will be moving into activities to bring up what work we want to do together as a group for AFS. Your name and area team will be listed on the bio page.

OPTIONAL: Consider (or take) 3-5 photos of yourself that we could add to the bio page. If desired, consult your partner if you can't decide on a photo. If you're not happy with yourself in photos but you're a visual person draw or make something and snap a photo! If you'd rather your profile remain text, that's great as well.

- Follow-Up Email (24 hours after call)
  - i. If profile has been sent –  
Hi NAME,

I hope everything went well with your conversation yesterday. I got your profile and am glad to see that you were able to go over so much. I'll be updating the profiles as I get them, so you should see yours updated on the [Diversity Committee bios](#) page on AFSWiki soon. I'll let you know when it's up.

We'll be moving into the next part of this project around DATE. We've got a call scheduled for DATE TIME. We'll talk about how all this went, and take a look at the finished Wiki pages. In the meantime, if you've got any feedback, I welcome emails, or we can have a call.

- ii. If profile has not been sent –  
Hi NAME,

I'm writing to check in after your call yesterday. I want to make sure that everything went well, and certainly want to provide any support I can if not.

If you plan on sending in your profile, this is just a little reminder to send that in by tomorrow.

We'll be moving into the next part of this project around DATE. We've got a call scheduled for DATE TIME. We'll talk about how all this went, and take a look at the finished Wiki pages. In the meantime, if you've got any feedback, I welcome emails, or we can have a call.

#### 8. Step-by-step Walkthrough

- Pair participants off. If an odd number, a triad can be formed. In a triad one should interview and be interviewed by a different triad member.
- When groups have formed, schedule a time that works for the two (or three) participants and a facilitator.
  - i. Let participants know that the facilitator will join the call at the beginning only. They'll be available until the conversation is over though.
- Agree upon a common stable means of communication (Telephone, Skype, Google Hangouts, FaceTime, WhatsApp, etc.). Remind participants that one or both should have access to email at the time of the call.
  - i. As an additional resource for participants, a Google Doc could be set up for each pairing.
- Within 10 minutes of the agreed upon call-in time, facilitator should send the introductory email.
- Facilitator should remain available and attentive for 2 hours after the beginning of each conversation.
- Facilitator should send follow-up email 24 hours following the conversation. Follow up email opens up initial feedback opportunity.
- Phone call (if possible) beginning next activity will debrief this one. Question guide for group call to debrief:
  - i. What does everyone think about the new profiles?
  - ii. Did anyone learn more about someone else they'd like to share?
  - iii. What organizations or communities do we have represented here? Please only self-identify if you're comfortable.
  - iv. What thoughts did this bring up about where we are and where we want to go?
  - v. What are some things we can do just with the network we now know we have in this room? No need to go into much detail, we'll explore this further.

#### **Activity: Glossary**

1. Time – Ongoing
2. Overview – In this activity participants will begin work on a living document for the group. This will be a glossary of terms as defined by the group based on awareness, skills, and resources we use in the work of diversity and inclusion within the organization. The initial intention of this activity is to establish common language between the members of the DIAG, and clarify any differing definitions. This glossary

can serve as an organizational resource as well with some small adjustment should the group choose to pursue it.

3. Purpose – Establish a starting point for conversation around vocabulary used when discussing issues of diversity and inclusion so that members of the DIAG can begin to speak comfortably and confidently about organizational needs and experiences whether or not they are shared.
4. Goals –
  - o Generate personal definitions for each term for which participants have enough knowledge or experience with to define.
  - o Combine definitions with facilitated discussion about differences in definitions.
  - o Continue to adjust and supplement this glossary in the future.
5. Objectives –
  - o Teambuilding
  - o Resource Development
  - o Consideration of the communities, and issues directly impacted by the work of the DIAG
6. Technology Requirements –
  - o Cloud-based spreadsheet or table software with column- and/or row-based permission settings (Google Spreadsheets; Excel saved on OneDrive; SharePoint)
7. Documentation –
  - o Document  
The spreadsheet acts as its own historical record. Set up as below:

Word/Term	Participant 1 Name	Participant 2 Name	Participant 3 Name
Word/Term1			
Word/Term2			
Word/Term3			

Column permissions should allow participants to only contribute their definitions to their own rows.

The “Word/Term” column should have open permissions so that participants can expand terminology in the glossary.

- o Instructions

We use a lot of terminology in working toward an inclusive organization. The goal of this activity is to develop a common understanding of the terms that we use.

Instructions: Click on the link below to be taken to a Google Sheets spreadsheet. Log in with your afsusa credentials if requested.

Here you'll find a column with vocabulary and terminology and columns with each of our names.

If you have familiarity or understanding of these terms, please provide your definition. If you do not, but have questions, please ask them here.



If you have other terms or vocabulary to add, please do so.

Please do not fill out definitions of vocabulary or terms with which you are unfamiliar.

Note: We will not necessarily come up with standard definitions such as definitions defined by the community represented. These more

Established definitions will be consulted and considered by the group if it is decided to use the list externally for any reason.

-LINK-

Duration: This spreadsheet will be live at least for the duration of the Strategic Planning Workshop

#### 8. Step-by-step Walkthrough

- Send Instructions via email to the entire group.
- Throughout workshop, check in on document and send reminders throughout.
- Consensus-based debrief call:
  - i. Opening: The permissions in this activity limit people to contributing definitions on their own column, but it is still possible to contribute a definition that might differ so drastically from another's that they are in conflict. As a group guiding the organization through diversity issues, this call is as much an opportunity to establish what we mean when we use certain words or terms as it is an opportunity to practice working with fellow AFSers through establishing mutual understanding. We'll go about these definitions by consensus, meaning that when we've settled
  - ii. Work through each definition, time allowing, to come to agreement on the definitions.
  - iii. Conflict Process:
    1. If two or more people disagree on a definition, another group member who does not identify with the definition, if possible, is asked to facilitate the discussion.
    2. The two are both given an opportunity to discuss the differences in their perspectives
    3. Participants whose identities are directly impacted by the term in question are invited into the discussion
    4. The group as a whole has a brief general discussion
    5. Each participant consents to, abstains from input, or blocks the definition from being established.
    6. If blocked, the term can be brought up for discussion again in the future.

- iv. Allow time to re-connect as a group
- v. Question guide for debrief
  - 1. What is it like to work through these definitions together?
  - 2. If you felt challenged at all, what did that bring up?
  - 3. If you felt uncertain about a particular term, or encountered a new term, what was your reaction?
  - 4. How might an average AFS volunteer or participant react to reading some of these definitions?
  - 5. What levels of knowledge are there in your AFS spheres regarding some of this terminology?
  - 6. If we bring in AFS-USA as an organization to this type of language, what education might need to happen in order to support the people who use this language not as diversity and inclusion terminology, but as terminology to describe their day-to-day lives?

## Section II – Framework and Mission

### Activity: What Works

1. Time –
  - Time for activity completion: 5 days.
  - Total time for activity: 1-2 hours.
2. Overview – This is an individual activity informing the next. In this activity, participants will look to three movements that have enacted significant change in their particular contexts, and consider in what way the values expressed by the organization are demonstrated in organizational structure and web presence.
3. Purpose – To consider movements that have been successful changemakers as inspiration for how the DIAG can both practice what we preach, and guide AFS to do the same.
4. Goals –
  - Gain familiarity with one or more organizations that has/have enacted social or organizational change.
  - Generate ideas on mission-based strategies for AFS-USA
5. Objectives –
  - Knowledge-building
  - Analysis of relevant social movements
  - Reflection on AFS values
6. Technology Requirements –
  - Internet Connection/Browser
7. Documentation –
  - Instructions

Close your eyes and take a deep breath.

Forget everything you know about AFS at the International and US level.

The purpose of this activity is to consider what is being done outside of the realm of AFS. The challenge to learn such things is that diversity and inclusion work is

done so internally, that looking at other organizations only demonstrates the surface of what has been done, so instead we're going to look at organizations and groups who are or have focused on direct change based on shared experiences.

Take at least an hour this week to do some research on a group affecting change. Look up their website, their social media, their events, and see what seems to work and what seems not to work.

Some things to pay attention to:

Mission/Message	Approach to Change
Presentation	Composition
Social Media Presence	Resources
Actions Taken	Partnerships
Activities	

The list can go on, but primarily the focus is for you to familiarize yourself with this group and understand what you respond to, both positively and negatively, about their approach to bringing about change.

#### The Takeaway

When you have an understanding of the group, the takeaway is simple. Come up with a list of 5 successful strategies the group is implementing and 3 ways in which you see the group demonstrating (or not) that they practice what they preach. These observations will be vital as we move into establishing a mission statement and planning projects.

Name of Group: The Movement for Black Lives

Approximate Timeline: Policy Platform Published during the 2016 Democratic National Convention

Mission Statement: "Our hope is that this is both an articulation of our collective aspirations as well as a document that provides tangible resources for groups and individuals doing the work. We recognize that some of the demands in this document will not happen today. But we also recognize that they are necessary for our liberation." - From "About Us" [policy.mrbl.org](http://policy.mrbl.org)

Group Description: "In response to the sustained and increasingly visible violence against Black communities in the U.S. and globally, a collective of more than 50 organizations representing thousands of Black people from across the country have come together with renewed energy and purpose to articulate a common vision and agenda." - From "About Us" [policy.m4bl.org](http://policy.m4bl.org)

## Primary Links:

- Primary Website - <http://m4bl.org>
- Platform - <http://policy.m4bl.org/platform>
- Downloads - <http://policy.m4bl.org/downloads/>
- About Us - <http://policy.m4bl.org/about>

## Social Media -

- Twitter (<https://twitter.com/mvmt4bl>)
  - Facebook (<https://www.facebook.com/mvmt4bl/>)
  - Instagram (<https://www.instagram.com/mvmt4bl/>)
  - YouTube  
(<https://www.youtube.com/channel/UCsZucZnzTUWIQlAibTAzKNA>)
- 

## Name of Group: Human Rights Campaign

## Key Moments:

- Founded in 1980
- Presidential Endorsement of Bill Clinton - 1992
- End of HIV Travel Ban – 2009
- "Don't Ask, Don't Tell" Repeal - 2011
- Marriage Equality - 2015
- People's Brief - 2015

Mission Statement: "The Human Rights Campaign and the Human Rights Campaign Foundation together serve as America's largest civil rights organization working to achieve LGBTQ equality. By inspiring and engaging individuals and communities, HRC strives to end discrimination against LGBTQ people and realize a world that achieves fundamental fairness and equality for all." From "HRC Story" [www.hrc.org/hrc-story/mission-statement](http://www.hrc.org/hrc-story/mission-statement)

Group Description: "The Human Rights Campaign represents a force of more than 1.5 million members and supporters nationwide. As the largest national lesbian, gay, bisexual, transgender and queer civil rights organization, HRC envisions a world where LGBTQ people are ensured of their basic equal rights, and can be open, honest, and safe at home, at work and in the community." From "HRC Story" [www.hrc.org/hrc-story/](http://www.hrc.org/hrc-story/)

## Primary Links:

- Primary Website - <http://www.hrc.org/>
- HRC Story - <http://www.hrc.org/hrc-story>
- Local Issues - <http://www.hrc.org/local-issues>
- Resources - <http://www.hrc.org/resources>
- Explore - <http://hrc.org/explore>

## Social Media -

- Twitter - <http://twitter.com/HRC>
  - Facebook - <http://www.facebook.com/humanrightscampaign>
  - Instagram - <http://www.instagram.com/humanrightscampaign>
  - Google+ - <http://plus.google.com/+HumanRightsCampaign>
  - Pinterest - <http://www.pinterest.com/hrcequality>
- 

Name of Group: Returnee Relations (AFS-USA) - Began as Returnee Initiative Task Force in 2009

Mission Statement: "AFS-USA Returnee Relations engages Returnees throughout the Returnee Life Cycle by providing resources, support and opportunities for their growth, development and connections thus encouraging a life-time of participation within the AFS community." From [http://www.afswiki.org/index.php/Returnee\\_Initiative](http://www.afswiki.org/index.php/Returnee_Initiative)

Group Description: "The Returnee Initiative (RI) was a National Council Task Force. It began in the spring of 2009 and continues to expand to involve more returnees who are interested in giving back to AFS while continuing their own personal and professional growth through engagement in returnee volunteer positions. The Returnee Initiative had evolved, and is now known as Returnee Relations." From [http://www.afswiki.org/index.php/Returnee\\_Initiative](http://www.afswiki.org/index.php/Returnee_Initiative)

Primary Links:

- Primary Website - [http://afswiki.org/index.php/Returnee\\_Initiative](http://afswiki.org/index.php/Returnee_Initiative)
- Returnee Leadership Summit - [http://afswiki.org/index.php/Returnee\\_Leadership\\_Summit](http://afswiki.org/index.php/Returnee_Leadership_Summit)
- Returnee Engagement Advisory Group - <http://afswiki.org/index.php/>
- Returnee Engagement Toolkit - [http://afswiki.org/index.php/Returnee\\_Engagement\\_Toolkit](http://afswiki.org/index.php/Returnee_Engagement_Toolkit)
- Returnee Volunteer Opportunities & Resources Flyer - <http://afswiki.org/w/uploads/a/a9/>
- Returnees\_Volunteering\_with\_AFS.pdf
- Returnee Rewards Program - [http://afswiki.org/index.php/Returnee\\_Rewards\\_Program](http://afswiki.org/index.php/Returnee_Rewards_Program)

Social Media -

- Twitter - <http://twitter.com/HRC>
- Facebook - <http://www.facebook.com/humanrightscampaign>
- Instagram - <http://www.instagram.com/humanrightscampaign>
- Google+ - <http://plus.google.com/+HumanRightsCampaign>
- Pinterest - <http://www.pinterest.com/hrcequality>

## 8. Step-by-step Walkthrough

- Send Instructions via email to the entire group.

- This activity leads directly into the next. Debrief exists within the transition to the Mission Statement

### Activity: Mission Statement

1. Time –
  - This activity and the below “Chain Letter” are intended to be delivered at the same time
  - Time for activity completion: 5 days.
  - Total time for activity: 1/2 hour.
2. Overview – This activity crowdsources participant workshop insights and personal experience to develop language for a mission statement. Group discussion at the end of the activity will lead to a DIAG Mission Statement
3. Purpose – Develop a mission statement based on workshop and personal input.
4. Goals –
  - Crowdsourcing language from past activities, organizational literature, and personal experience
  - Group development of mission statement based on this input.
5. Objectives –
  - Consideration of values and language addressed in workshop thus far as applied to a mission statement.
  - DIAG Mission Statement
6. Technology Requirements –
  - Form or Survey software (Google Forms, Adobe Forms, SurveyMonkey, etc.)
  - Telephone or group communication software
7. Documentation –
  - Instructions

*Now we're getting into the substance of the group. We've established who we are, how we interact with the group, and done some high level thinking about what we and others do diversity, equity, and inclusion.*

*Along with the Language Activity in the form of the Glossary, the mission statement will give us and the rest of the organization an understanding of what we're about.*

*In this activity we're going to pick and choose some vocabulary, settle on language for our mission statement, and consider what questions we need to ask before we take action.*

*Survey -*

*Section I – Survey Responses*

*Please rate the words/terms below based on how important they are to the DIAG mission.*

***The terms and phrases in this question should be pulled from analysis of the needs assessment survey. In using SurveyMonkey for the needs assessment, language frequency analysis was available and this was used to develop terminology for this question to be rated on a scale from “Very Unimportant” to “Very Important”***

*Section II – AFS Literature*

*Below are the AFS-USA mission statement, slogan, and Equity and Inclusion Statement. These are already established as publicly facing information about AFS-USA's ethics and values. Take a look at this language and then respond to the questions below.*

*AFS-USA Mission Statement - AFS-USA works toward a more just and peaceful world by providing intercultural learning experiences to individuals, families, schools, and communities through a global partnership. (From <http://www.afsusa.org/about-afs/>)*

-The following words or phrases should exist in the DIAG mission statement:

-The following words or phrases are sufficient here and don't need to make it to the DIAG mission statement:

-In one word, the spirit of AFS-USA's mission statement is:

AFS-USA Slogan – Connecting Lives, Sharing Cultures

- The following words or phrases should exist in the DIAG mission statement:

- The following words or phrases are sufficient here and don't need to make it to the DIAG mission statement.

-What might “Connecting Lives, Sharing Cultures” mean for the DIAG?:

*AFS-USA Equity and Inclusion Statement*

*The mission of AFS-USA is dependent on the quality of our volunteer and participant network. The mission and the preservation and growth of this network requires that AFS-USA strive to extend opportunities to volunteers, participants, and staff regardless of their gender, race, sex, age, creed, sexual orientation, religion, veteran or marital status, national or ethnic origin, political opinion, economic and social standing or disability.*

*AFS-USA is committed to providing international and intercultural learning experiences for individuals from diverse backgrounds and communities through a global volunteer partnership. We believe an inclusionary and equitable approach enriches our ability to draw from all voices, perspectives and methods. To this end, we are involved in a number of initiatives to make this a reality and further advance our mission.*

*AFS-USA affirms its commitment to volunteer and staff equity and inclusion as an asset that enriches individuals, organizations, and society. We believe that international education and exchange deepens our appreciation of the complex contributions of human society as well as our understanding of the consequences of social division. We solicit and encourage each individual's contribution to a collaborative organization that welcomes diversity of opinion and positions in its pursuit of shared goals.*

*As an intercultural exchange organization, we seek in principle and in practice to make AFS-USA increasingly equitable and inclusive, to encourage participation by underrepresented groups at all levels of our organization, and to explore new opportunities to use our inclusiveness as a resource for strengthening our organization and advancing its mission. We pledge to hold ourselves accountable for the pursuit of these goals. (From <http://www.afsusa.org/about-afs/equity-and-inclusion/>)*

-The following words, phrases, or concepts should exist in the DIAG mission statement:

-The following words, phrases, or concepts are sufficient here, and don't need to make it to the DIAG mission statement:

-What might be missing from the Equity and Inclusion Statement?

### *Section III – On the Web*

*Remember reviewing the various other organizations from last week? This is where that comes in. Please use the space below to share your impressions of the way that these organizations communicate their values. What do you see in their mission statement that corresponds to action? What connects? How do they convey their messages?*

*A reminder of the three that were provided:*

*A Movement for Black Lives - <http://action.movementforblacklives.org>*

*Human Rights Campaign - <http://www.hrc.org>*

*Returnee Relations (formerly Returnee Initiative) - [http://www.afswiki.org/index.php/Returnee\\_Initiative](http://www.afswiki.org/index.php/Returnee_Initiative)*

-How did the organization you looked up convey their message?

### *Section IV – You*

*What do you want to see in a DIAG mission statement?*

-Please provide some vocabulary, phrases, or concepts you feel are vital to reflect the work the DIAG needs to do, and the values that guide that work.

### *Section V – Try it out! (Optional)*

Got an idea for what the mission statement might look like for the DIAG? Give it a try! Write your mission statement here.



## 8. Step-by-step Walkthrough

- Send instructions to group via email with 3-5-day window of completion
- Consensus-based debrief call:
  - i. Opening: This is the first of at least two such discussions we'll have to come to some consensus on language that we use within the group and representing the group. In this week's activities we have crowdsourced language to begin a conversation to define a mission statement and framework for our future projects. Now that we have some information on things that people would like to include in a DIAG mission, let's make it happen!
  - ii. Facilitated discussion identifying mission statement language.
  - iii. Conflict Process:
    1. If two or more people disagree on a definition, another group member who does not identify with the definition, if possible, is asked to facilitate the discussion.
    2. The two are both given an opportunity to discuss the differences in their perspectives
    3. Participants whose identities are directly impacted by the term in question are invited into the discussion
    4. The group as a whole has a brief general discussion
    5. Each participant consents to, abstains from input, or blocks the definition from being established.
    6. If blocked, the term can be brought up for discussion again in the future.
  - iv. Allow time to re-connect as a group
  - v. Read out final mission statement.
  - vi. Ask for any other comments. Get one more round of final consent.

### **Activity: Chain Letter**

1. Time –
  - To be delivered at the same time as the Mission Statement Activity
  - Time for activity completion: 5 days.
  - Total time for activity: 1-2 hours.
2. Overview – This activity is intended to develop a framework for considering future action within the group. In response to one or more actual suggestions from the needs assessment, participants build upon the questions and considerations they have for the proposed activity. The first participant will receive the initial idea and be asked list questions or considerations the proposed action inspires. Subsequent participants are then asked to build upon those considerations.
3. Purpose – To build a framework, perhaps a proposal form, for consideration of future action.
4. Goals –
  - Successfully pass a chain letter between all participants

- Develop a list of project/action considerations that can be transformed into a project/action framework.
  - Acknowledge needs and considerations for all stakeholders
5. Objectives –
- Teambuilding
  - Project Framework Template
  -
6. Technology Requirements –
7. Documentation –

Email

Hello -INSERT MEMBER NAME HERE-,

My name is Kenndu Milk (DIAG Name) and I'm just a simple volunteer living in Vermont. If you've received this as a forward it's because the person who sent you this knows you're a dedicated volunteer looking to make a difference. If you're the first to receive this...hi (first recipient) :)

I've been presented with an exciting idea and need your help.

--

*Example from needs assessment*

--

This is where your help is needed. If we're going to consider a project of this scope as an organization, we need to ask some questions first. Could you come up with 5-7 questions you might have about the implementation of such a proposal, then forward this message to a fellow DIAG member (email addresses below)?

-----WRITE YOUR QUESTIONS IN THE SPACE BELOW-----

If you've received this email as a forward, look to the questions others have posed in the space below. Try to build off of the questions that have been posed previously, though you can absolutely come up with your own.

For example, If FACILITATOR weren't the source of the rumors, and instead received the first email, he might come up with a couple questions like:

*Sample questions*

Another DIAG member, upon receiving the email, might spring off my questions to ask:

*Sample questions including building questions*

THIS IS A CHAIN LETTER. Past recipients have faced unknown horrors when they did not forward this email on within one (1) day of receiving it!

Jorge Castro received the letter and forwarded it after posing his questions. As a result, he became president of AFS-USA.

So go ahead. Ask your questions, forward it on, and go about your day avoiding racist businessmen. You might even become president!

=====Please enter your questions within the space below=====

=====Please enter your questions within the space above=====

Your potential recipients are below.

Update the list when you forward it to delete your name! If yours is the last, then forward the whole thing right back to FACILITATOR!

*Email Addresses*

If you have any technical questions, or any questions or concerns at all you can email me at *contact info*.

Thanks so much!

Kenndu

\*This is being comically presented for the sake of the activity, but it is an idea that has been suggested, and we'll actually get to answering these questions very soon, we just need to generate them first!

8. Step-by-step Walkthrough
  - Send the email to the first person. The activity should be introduced in a prior communication so that it isn't ignored.
  - Check in mid-week with a group email asking that the last person to receive the chain letter let the facilitator know.
  - Debrief along with the above activity.

### **Section III – Project Planning**

#### **Activity: Card Sort**

1. Time –

- Time for activity completion: 3 days.
- Total time for activity: 1-2 hours.

2. Overview – This is another individual activity, again to inform the next.

The first part of this activity will see participants sorting a variety of suggestions into categories based on how the group might handle the data. One category to have is a category relating to action such as “Projects”.

The second part of this activity will see participants sorting the projects that were suggested into categories based on appropriateness to the mission, personal interest/availability, workload, impact, etc.

3. Purpose – To process and divide suggestions from the needs assessment and begin to identify projects for which we have interest and/or resources
4. Goals –
  - Process/Analyze needs assessment data for group action
5. Objectives –
  - Process needs assessment data
  - Categorize suggested projects for implementation based on group input
6. Technology Requirements –
  - Card sorting software (free limited trial from Optimal Workshop)
7. Documentation –
  - Part I:
    - i. Categories – Feedback; Project Suggestion; Concern; Anecdote; Interest in Joining, Etc.
    - ii. Cards – Needs Assessment Input
  - Part II:
    - i. This part can have multiple card sorts based on what individual, group, and organizational concerns might arise with participants.
  - As this is a subjective activity, it is important for the facilitator to familiarize themselves with the software and design the card sort themselves. The cards and categories are specific to the needs assessment input.
8. Step-by-step Walkthrough
  - Send instructions to complete Part I
  - As a majority of participants complete Part I, send Part II instructions
  - The information from this activity directly influences the final activity to come.

### **Activity: Project Planning**

1. Time –
  - Time for activity completion: 5 days.
  - Total time for activity: 1-2 hours.

2. Overview – This activity ties off the last loose ends of the workshop. The framework developed from the chain letter is provided to groups in order to consider the proposed projects from the card sort.
3. Purpose – To consider from a group-developed framework, projects suggested by the group and other interested parties.
4. Goals –
  - To implement and adjust the project framework template as needed
  - To begin planning steps for future DIAG projects.
5. Objectives –
  - Teambuilding
  - Project planning
6. Technology Requirements –
  - PDF Viewer
  - Telephone or group chat software
7. Documentation –
  - Instructions

This is our final activity! We've got profiles, frameworks, and missions, oh, my! In this activity we're simply going to work together to answer the questions we developed in the chain letter with the projects we've just sorted.

Please discuss the below projects with your group members (listed below, and in the "To:" line of this email) whether by phone, chat or email, as it relates to the framework we developed (attached).

When you've done this, contact FACILITATOR and find out if another group is done. If so, expand your discussion to share your work between your groups. As a group, incorporate what additional thoughts contributed to this project.

Finally, bring your project to the final meeting on our next call. We'll work our way through planning for as many of the projects as we can, and continue to begin those projects until we've got them all under way!

8. Step-by-step Walkthrough
  - Form triads within the group and share the projects that were rated the highest based on your card sort parameters.
  - Send the instructions along with the project framework template to each group.
  - Facilitate the expansion by connecting groups as they complete their work.
  - Schedule project planning time into future agendas.