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# Engaging virtual communities in appreciative innovation

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# ENGAGING VIRTUAL COMMUNITIES IN APPRECIATIVE INNOVATION

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## Abstract

Since the introduction of the Internet, cyber networks have expanded into new virtual worlds, demanding global cooperation across borders, cultures, time, and space. Social media platforms have enabled consumers to exert increasing influence over business and communities. This experimental research combined appreciative inquiry and design thinking, into a new five-phase, 6-week process (AI.d) and examined its use as a tool for innovative collaboration. Young adults from a globally dispersed spiritual community applied AI.d, using Facebook as a collaborative virtual space. Virtual interaction, collaboration, relationship, goal efficacy, skill building, and innovation were measured. Results were positive: resources were identified and used; ideas were generated, evolved, and executed; a new role (*community connector*) was defined; and participants initiated their own projects for creating an integrated community. AI.d may be useful for communities and organizations seeking to discover and apply the talents and resources of members as a means to advance innovation.

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# Chapter 1

## Introduction

The 21st century has advanced technology, science, and fostered a level of interconnectedness not experienced during any other time in documented history. In this information age, consumers reign supreme as they tap the power of the Internet to "gain expert power from social media" and, in turn, influence the way organizations conduct business (Sinclaire & Vogus, 2011, p. 293). This tipping of the scales toward consumer command is not accidental. *Time Magazine* announced its controversial person of the year in December of 2006 to be the world's online users of social media such as Facebook and YouTube. This unprecedented growth in global networks has ignited global community and collaboration, forever changing the way the world changes (Grossman, 2006). Research by Sinclaire and Vogus (2011) affirms that "the open environment [of social media] empowers users to innovate in new ways" (p. 306). This translates to opportunities for networks to grow and become a powerful force of change, innovating some of the world's greatest challenges. The question is how global communities will utilize these online tools to confront complex problems in an effort to innovate the change desired?

### The Challenge

Change can be a frightening phenomenon; so much so that cooperation efforts may fall apart before a project can get underway. However, there may be another approach with which to tackle challenges while building the capacity of people during the process of innovation. Two paths of strategy are available when considering the process of change: managing the problems or capitalizing on community strengths. Most are familiar with the former where the experts are called in to diagnose and institute

solutions, but Avital, Boland, and Cooperrider (2008) indicate a new movement—one that puts a positive lens on the methods of change across all forms of human organizing. Coupled with the numerous platforms of social media, unending opportunities are ripe for members of global communities and organizations to turn capabilities of strength into innovative solutions. The curiosity about these opportunities provided the impetus for this research.

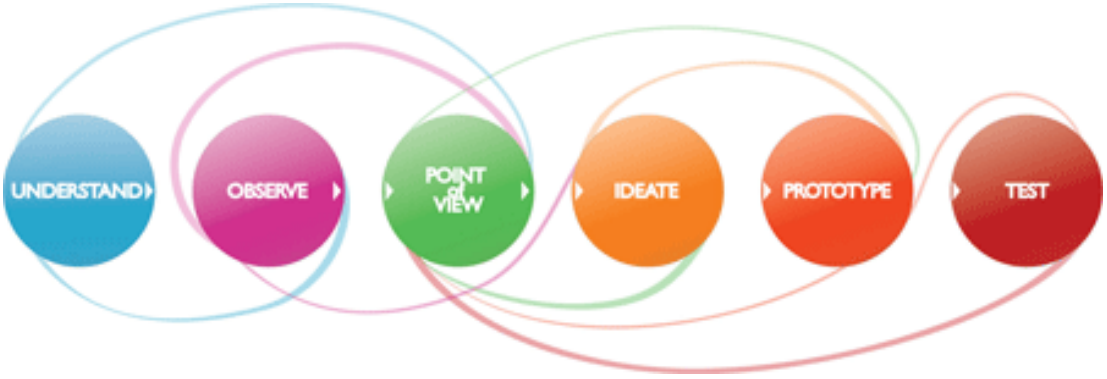
**The Opportunity**

Through two common vocabularies, appreciative inquiry (AI) and design thinking, which see the world as a mystery to be embraced and an opportunity to invent, unlimited possibilities become visible (Avital et al., 2008). This research explores a repackaging of innovation in an effort to make its process more accessible to every person, rather than relying solely on the experts. The philosophy and methodology of AI and design thinking are combined into a virtual process and made available to technologically connected users.

**Design Thinking**

Design thinking is a term coined by IDEO founder and Stanford Professor, David Kelley, to describe the general process designers use to create new products, services, or otherwise invent creative solutions to problems (Brown & Katz, 2009, p. 6). It is, "a synthesis of creativity (imagining new things) and innovation (bringing those new things into existence) within [a] multi-dimensional domain" (Mingfen, 2000, p. 210). Its methodology builds empathy, promotes a bias toward action, encourages ideation, and fosters active problem solving (Carroll, Goldman, Britos, Koh, Royalty, & Hornstein, 2010).

The process follows a general sequence of overlapping phases: understand, observe, point of view, ideate, prototype, and test (Carroll et al., 2010). The six phases of the design thinking process are shown in Figure 1. A simple example of encouraging recycling in a community is outlined in each phase to illustrate the process.




*Note.* From "Steps in a Design Thinking Process," The k12 Lab Wiki, 2009. Retrieved from https://dschool.standford.edu/groups/k12/wiki/17cff/Design_Process_Steps.html

**Figure 1**

**The Design Thinking Process**

**Understand**. During the first stage, designers explore a design challenge by conducting interviews with a diverse range of people to identify and fully comprehend the scope of a problem (Brown & Katz, 2009; Carroll et al., 2010). If, for example, a community wanted to better understand why its citizens were not using a recently implemented recycling program, design thinkers would begin by conducting interviews. Experts, the ecologically-conscientious, and the lesser-conscientious consumers would all be of interest since a diversity of viewpoints offers deeper insight into the problem at hand.

**Observe**. This stage explores the challenge at a greater depth by observing others' behavior, asking clarifying questions, and reflecting on what they see, developing

empathy for those whom they are designing (Brown & Katz, 2009; Carroll et al., 2010). In the recycling example, design thinkers might explore the daily routines of each interviewee, take pictures of their environments, and inquire into why they do the things they do. Often people are not aware of why they make particular choices when they have become routine. Observation unveils the reasons behind the behaviors that sustain a problem dynamic.

**Point of view**. Synthesis of the previous stages forms a point of view statement that understands the needs of the user and insight into the problem (Brown & Katz, 2009; Carroll et al., 2010). The point of view statement is framed in a "How might we" question. To carry forward the given example, design thinkers might discover that people are motivated to give back to their community by saving items for Goodwill. A fitting design question could be, "How might we encourage sustainable behavior that gives back to the community?"

**Ideate**. At this stage, designers and users are encouraged to be open risk takers, defer judgment, and collectively brainstorm as many ideas as possible. The more ideas populated and built off other ideas, the better; all of which are recorded and considered (Brown & Katz, 2009; Carroll et al., 2010). An idea brainstorm to create sustainable behavior might include bringing recyclables to be turned into artwork for the community or taking items to schools for a children's art day.

**Prototype**. The hands-on building begins through a succession of rapid prototypes from captured ideas in the previous stage. Through use of sketches or modeling from a diverse selection of materials, simple prototypes are used as a means to convey an idea to users (Brown & Katz, 2009; Carroll et al., 2010). A story board of pictures could tell the story about how the idea of a children's art day could play out. The

movie board is shared with city and school officials, teachers, parents, children, and local business owners to get their feedback and incorporate their ideas.

**Test**. In the final stage, designers test their prototypes with their users to see what works and continue to refine their ideas. By failing early and often, prototypes are able to help evolve an idea toward successful reification (Brown & Katz, 2009; Carroll et al., 2010). The prototype to create a children's art day using recyclables could be tested with one school. Notices could be sent home to parents and flyers posted in local stores to bring recyclables to an identified school for a one-day gala. If the day is a success, the prototype is scalable and if not, different ideations could be tested prior to full implementation.

What is important to note about design thinking is that it is not just a means to an end product but a process of learning, both of which are integral to sustainable change. Design thinking fosters the ability for anyone to act as a change agent by finding answers to complex and difficult problems using multiple variable solutions (Carroll et al., 2010). David Kelley, in an interview on *BusinessWeek*, describes this as a process that anyone can learn to use (Jana, 2006). In Brown and Katz's (2009) book, *Change by Design: How Design Thinking Transforms Organizations and Inspires Innovation*, design thinking is

> . . . an approach to innovation that is powerful, effective, and broadly accessible, that can be integrated into all aspects of business and society, and that individuals and teams can use to generate breakthrough ideas that are implemented and that therefore have an impact. (p. 3)

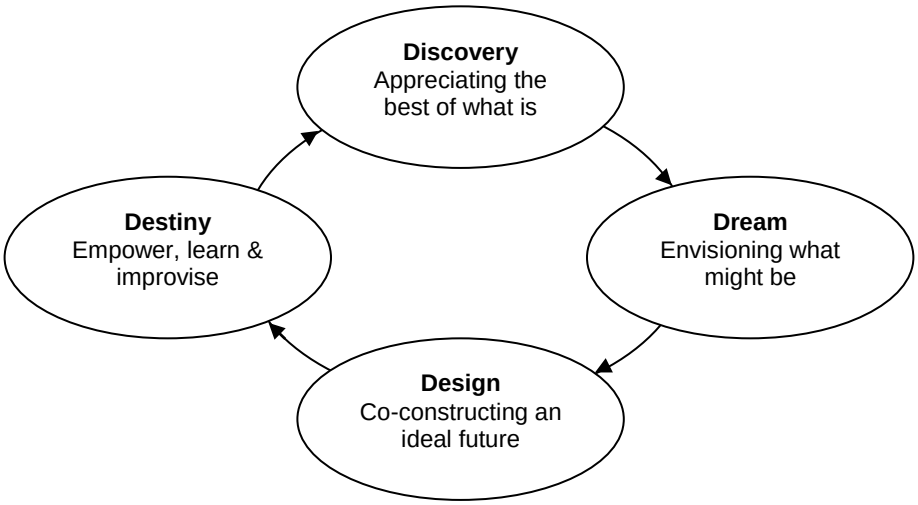
In short, design thinking is a skill set that can be learned, not just reserved for experts.

Adding an appreciative lens compliments the skill set of design thinking by building on the capacities and strengths of those who make up an organization or

community. Appreciative innovation incorporates the methodology of AI and begins with identifying the best of a system to leverage strengths.

**Appreciative Inquiry**

Watkins and Mohr (2001) describe AI as a system-wide, collaborative approach that identifies and enhances those aspects which give life to optimal human, economic, and organizational performance. First developed in 1980 by David Cooperrider, AI is based on social constructivism; the notion that anything observed is affected by the observer and therefore, there are no objective observations. Reality is constructed socially, passed on through the use of language and stories as it shapes the ideas and categories used to define history and culture. AI can be applied using different methodologies although one commonly used is the 4-D AI process (Cooperrider & Whitney, 1999) shown in Figure 2.




*Note*. Based on *Appreciative Inquiry* (p. 7), by D. L. Cooperrider, P. F. Sorensen, Jr., D. Whitney, and T. F. Yaeger, 2000, Champaign, IL: Stipes.

**Figure 2**

**The Appreciative Inquiry Process**

**Discovery**. Members of a system generate a collective inquiry into past successes and exceptional moments to uncover the core qualities which give it life. Structures, dynamics, and other conditions that support these life-giving forces to thrive are identified during the unfolding of stories and ideals (Watkins & Mohr, 2001). Following the same recycling example given to illustrate the design thinking process, AI would begin by inquiring into those instances where the community was already successfully engaged in sustainable behavior. Though such behavior may be uncommon, inquiry into those moments where community members were doing things like donating recyclable items to charitable causes would make visible best practices in operation.

**Dream**. Using shared life-giving themes surfaced in discovery, the system builds a foundation for a future vision for how it would feel and function if the exceptional moments became the rule (Watkins & Mohr, 2001). Example themes of sustainable behavior might include using recyclables to build art, donating items to Goodwill, using recyclable materials in building renovations, and the like.

**Design**. The system then designs for that vision to become a reality within sociotechnical architecture, aligning current processes and structures with the desired outcome (Watkins & Mohr, 2001). Carrying forward the example, a community might design a system that encourages using recyclable materials in building construction or community art displays.

**Destiny**. Also known as the delivery phase, the system takes collective action to initiate change based on the preferred future image (Watkins & Mohr, 2001). In the recycling example, community members may begin by finding novel ways to collect recyclable materials and identify other ways they could be put to use such as composting for a community garden.

**Combined Methodologies**

AI is a powerful, practical process with transformational capacity to shift thinking and institute new models for lasting change (Bushe & Kassam, 2005). With the combined capabilities of highly participative, whole system change indigenous to AI (Whitney, Trosten-Bloom, & Rader, 2010) and the innovative capacity of design thinking (Beckman & Barry, 2007), it is possible to blend the two processes into one methodology that could potentially transform existing system paradigms to better serve the modern era.

The combined AI and design thinking methodology will henceforth be referred to as *AI.d*. AI stands for appreciative inquiry and the lower case d is representative of design thinking, as descriptively used in the name of the Hasso Plattner Institute d.school at Stanford University.

**Research Setting**

A global, spiritual community of young adults practicing a particular path of meditation yoga as disseminated by Self-Realization Fellowship (SRF) serves as an ideal community to conduct a pilot test of the virtual AI.d process. The spiritual community is composed of local groups of young adults associated with temples located around the world. However, these groups rarely interact and members often do not communicate with other members of other groups unless a presented the opportunity at a large event such as the annual SRF convocation in Los Angeles. While many young adults utilize social media, few take the opportunity to connect with others outside their local temple. A desire for more connection with other spiritual young adults has been expressed and some have organized a Global SRF Young Adults community website though there has been little success in fostering greater interaction between members of different temples.

Exploratory research took place virtually using Facebook as a platform to facilitate the five phase virtual AI.d process with the Global SRF Young Adults community. Prior to the start of the 6-week virtual process, participants were asked to report on their demographics, virtual interaction with community members, community collaboration, and their relationships with other community members to an online survey. Halfway through the virtual process, an optional two-hour design summit was held at a temple in the Southern California area to support the design process. With participant permission, the researcher took photographs to document qualitative data as a measure of innovation. The research concluded with a post-survey that asked participants to again rate their virtual interaction, community collaboration, and relationship in addition to collecting data on empathy, as a measure of relationship, goal efficacy, and skill development. A paired samples t-test is used to determine significance for virtual interaction, collaboration, and relationship. Empathy, goal efficacy and skill development means and standard deviations are analyzed to assess impact of the 6-week virtual process.

**Purpose of Research**

The purpose of this research is to investigate AI.d, a synthesis of AI and design thinking, in a virtual community. The virtual AI.d process intends to put the design process in the hands of the users, who best know the needs of their community or organization in order for it to thrive. AI.d moves from the notion that the expert designer is a central figurehead to the notion that everyone is a designer, transversing the gap from designer-as-expert to user-as-expert while employing the positive lens of AI.

The success of the virtual AI.d process is assessed by the following questions: (a) Will the virtual AI.d process increase virtual interaction on social media among

community members?, (b) Will measures of effective community collaboration increase as a result of AI.d?, (c) Will AI.d increase measures of relational closeness among community members?, (d) How does AI.d affect the level of innovation from idea generation to goal execution?, (e) Will the virtual AI.d process effectively execute the goals articulated by participants?, and (f) Does AI.d increase skill development in the areas of collaboration, relationship building, goal execution, and innovation? Each of these variables will be analyzed in Chapter 4 using both qualitative and quantitative analysis.

**Significance of Research**

AI.d must be developed and tested to assess its effectiveness and viability. Its theoretical roots in design thinking and AI are powerful known tools, however the virtual AI.d process is the first combined methodology. The facilitation of AI.d through virtual means is another aspect of this research important to determining its capability to foster positive innovation. The implications of an effective process which can be employed virtually are far reaching considering the current status of social media usage for organizations and communities alike.

**Thesis Outline**

Chapter 2 delves deeper into the theoretical roots of design thinking and AI and how the two can be synthesized into AI.d. Chapter 3 will detail the AI.d methodology and Chapter 4 presents the results of the qualitative and quantitative analyses. Finally, Chapter 5 revisits the original purpose of this study, reviews key findings, and implications for the application of the virtual AI.d process in organizations and communities. Limitations of the study and recommendations for further investigation will also be discussed.

# Chapter 2

## Literature Review

The purpose of this chapter is to build a theoretical framework for virtual AI.d by first exploring virtual collaboration, followed by examining the theoretical roots of AI and design thinking. Finally, AI and design thinking are integrated to form AI.d while describing points of convergence and divergence in the concepts. The chapter concludes with a brief overview of the research objectives and a description of chapter 3.

### Virtual Collaboration

Kirschner and Van Bruggen (2004) describe some of the foremost trends of the twenty-first century to include increased globalization of economies, multiculturalism, and speed of information exchange. These shifts have left organizations no other choice than to turn to technology as a mode to connect disparate workforces across time and distance. Frequently, teams operating in a virtual work space must contend with cross-cultural, language, trust and cohesion barriers often aggravated by the limited opportunities to identify common values (Kauppila, Rajala & Jyrama, 2011). To that list of challenges, Karpova, Correia, and Baran (2009) point out how learning new technology can be overwhelming and frustrating to users, thereby discouraging application of technological advances. On the other hand, technology brings to light new possibilities which allow organizations to become cost efficient, use knowledge from all over the world, better utilize human capacity and resources, institute high levels of parallel participation with 24-hour work, and increase ease of documentation and review having an electronic archive at their disposal (Berry, 2011). Technological infrastructure is the lifeline virtual collaboration depends on and without which, no virtual community would be possible (Garber, 2004). Technology that enables virtual collaboration to

accomplish work on a global level appears to be a mixed blessing. However, Berry (2011) makes an important distinction that technology should be "understood as only a communication and collaboration tool and not as communication or collaboration itself" (p. 191).

**Computer-mediated communication**. Communication, defined as the exchange of information, meaning, and understanding between two or more parties, is the cornerstone of virtual collaboration (Berry, 2011). Virtual communication is then the exchange of information, meaning, and understanding across time and space accomplished through technological means. Hogan and Quan-Hasse (2010) assert that the degree of communication and closeness online mirrors exactly that offline, further supporting Berry's (2011) notion that technology is simply the tool. The earliest forms of computer-mediated communication included email and discussion boards, provided limited opportunities for collaboration (Karpova et al., 2009). Later, the appearance of instant messaging, document sharing, and video and web conferencing presented a multitude of options, each with its own benefit and caveat. Depending on whether the objective is to remain strictly task-oriented or surface greater levels of cohesion and knowledge best facilitated by a deepening of relational connection, certain types of computer-mediated communication can be a blessing or a curse. Kauppila et al. (2011) revealed that small talk or watercooler stories are generally present when using emails or phone calls but become absent in portal discussions leaving the objective completely task-oriented. Karpova et al. (2009) give a comprehensive look at the pros and cons of various modes of communication though of particular interest to this work are those modes which use asynchronous communication.

**Asynchronous communication**. Mittleman and Briggs (1998) combine the dimensions of same or different time and place to define four types of virtual interactions (Berry, 2011). Asynchronous communication occurs in different times but in the same place such as a network or social media platform. This affords members the ability to communicate, collaborate, and complete task outputs simultaneously and flexibly, irrespective of their geographic location and time zone. Virtual teams depend most frequently on asynchronous communication as a mean to complete tasks, giving them an advantage over the same time, same place dimension required of teams working face-to-face.

One of the greatest benefits of asynchronous communication is that multiple threads from multiple contributors are able to take place simultaneously, providing a space for members to express ideas completely without interruption, unlike synchronous communication (Berry, 2011). There is no need to schedule a meeting in order to initiate a discussion to address problems, share perspectives, ask questions, or receive feedback thus allowing communication and an exchange of up to date information in such a way as to not disrupt other important activities (Berry, 2011; Kauppila et al., 2011; Waters, 2007).

With asynchronous technology capability, it is possible to orchestrate large scale, whole-system change through collaboration using such methods as open space, AI, and world cafes without the inconvenience of juggling physical logistics. Ideas, knowledge, capabilities, and a diversity of cultures could engage in a project such as resource allocation for an alliance or expressing different points of view in community building. Social media may be a convenient platform wherein such collaborative gatherings can flexibly commune.

> Interestingly, social media such as Facebook provide viable models for these platforms, as they have proved to be versatile environments for sharing knowledge and keeping abreast of what is going on even within large networks of people (Kauppila et al., 2011, p. 414).

**Virtual environments**. The design of virtual environments has a large degree of influence on the depth and type of interactions that can take place. Creating a sense of community is essential to successful virtual interaction (Kauppila et al., 2011). Garber (2004) emphasizes the necessity for deliberate construction of virtual space as the degree of infrastructure complexity determines the degree of interactions that can take place.

> Simple online community infrastructures facilitate basic communication and interaction functions, while more advanced technologies allow their users to create a virtual place where they can create new identities and environments to explore (Garber, 2004, p. 2).

Bringing an open-to-all, friendly, safe (perhaps confidential) space to a virtual environment can help to mitigate overreliance on task orientation (Berry, 2011) and facilitate knowledge sharing (Kauppila et al., 2011), idea formulation and iteration, surface key observations (Peppler & Solomou, 2011), thoughts, and feelings, and provide space for the emergence of novel topics through dialogue (Moffat & McLean, 2009).

**Social media**. Accounting for as much as one third of new web content, social media has gained considerable interest by corporations, governments, and non-governmental organizations (Finin, Joshi, Kolari, Java, Kale, & Karandikar, 2008) making it one of the most readily usable modes of computer-mediated communication. “As more of our world moves into online spaces, social media platforms become a central fountainhead for dispersed communities to share innovative ideas and original artifacts, as well as contribute to the discussions around those ideas” (Peppler & Solomou, 2011, p. 22).

One of the reasons social media platforms, such as Facebook, MySpace, and Twitter, have become so popular is most likely because they combine several modes of computer-mediated communication such as email messaging, instant messaging, testimonials, blogging, and profile searching (Hogan & Quan-Haase, 2010). Social media tools are highly customizable, permitting leaders to create their own environment specific to the needs of their community (Peppler & Solomou, 2011). The combined power of one-way (broadcasted message to audience) and two-way (author and respondent) communication (Hogan & Quan-Haase, 2010) allow for multiple kinds of interaction and participation.

Moffat and McLean (2009) discovered that social media lead to tangible business decisions and outputs and enable virtual teams to create a new culture. The unfolding of current cultural, environmental, political, and personal events in real time are often editorialized and reframed with personal opinion in re-posts by new authors, making social media capable of reinterpreting culture aside from mere content creation (Hogan & Quan-Haase, 2010). The strength of virtual platforms such as social media has literally reshaped our cultural way of identifying and interacting with the world of information whether within a causal, friendly exchange among friends on a conversation thread or within high performing organizational teams orchestrating a merger.

**Virtual communities**. Computer-mediated communities who share common experience, awareness, beliefs, or values are defined as virtual communities (Memmi, 2006). Garber (2004) takes this definition one step further to include that communities of any variety are the sharing of relationships that foster shared identity, commitment to a cause, and participation in activities. It matters little whether a community or team is virtual or face-to-face; both require established social relationships in order for

collaborations to be effective (Berry, 2011). The degree to which virtual communities or teams can foster social closeness is a source of some debate. Memmi (2006) contends that virtual spaces minimize social politics and therefore create a more efficient means to accomplish tasks while Moffat and McLean (2009) have demonstrated in their research how virtual communities are able to express feelings and emotions around organizational politics in an effective way such that a new organizational culture can emerge. What is not in dispute is that the degree of relational strength and trust determines the depth of conversations and cohesion that allow virtual communities to share knowledge (tacit or explicit), learn, and innovate (Kirschner & Van Bruggen, 2004; Karpova et al., 2009; Kauppila et al., 2011).

Using graduate students from different schools, Karpova et al. (2009) reveal how the creation of social and emotional bonds helps to facilitate virtual interaction. In one student's words, "First, you have to get to know each other and get as much information as possible to create social and emotional context, which helps develop reciprocal understanding of each other and to know how people work" (p. 49).

Implementation of work also depends on shared ownership. Moffat and McLean (2009) attribute the level of community member support in implementation to sustained participation, participant inclusion, and the co-creation of solutions. Waters (2007) affirms the importance of inclusion in a study that implemented technology platforms as a way for educators to plan and update curriculum: "The more teachers feel that they have some say in what the final product will be, the more likely they are to use them. I think they've changed our whole culture" (Waters, 2007, pp. 43–44).

**Virtual collaboration**. The challenge evident in virtual collaboration lies in how a particular process and technological infrastructure is designed such that communities

can achieve the cohesion necessary to carry out their goal (Karpova et al., 2009; Moffat & McLean, 2009). Without accounting for the social dimension of non-verbal cues, perspective sharing, storytelling, and meaning making to bridge the functional and cultural differences among members, collaborations conducted in virtual spaces are not likely lead to transformational outcomes (Garber, 2004; Kauppila et al., 2011; Kirschner & Van Bruggen, 2004).

Conkright (2011) successfully conducted a virtual AI summit that gave participants the tools to initiate their own direction and design their own future without waiting for leadership to provide direction and solutions. Clearly, the flexibility and independence afforded through asynchronous technology, good design and expert facilitation of a virtual community can lead to benefits unknown to traditional teams. A brief list would include: broadening cultural intelligence, embracing of diverse perspectives, creating information systems capable of faster responses and peer monitoring for information accuracy (Kauppila et al., 2011), and leveraging vertical integration and expertise by creating teams with the hit of a button (Berry, 2011; Karpova et al., 2009). “Organizations that are unwilling or unable to use virtual teams may find themselves losing out in an increasingly competitive and rapidly changing global economic and social environment” (Berry, 2011, pp. 201–202).

**Theoretical Roots of Appreciative Inquiry**

A new form of action research revolutionized the field of organizational development and shifted a commonly held viewpoint about the process of change. Until AI was introduced, change was almost certainly associated with problems to be solved. Action research was primarily used as a method to search for deficits, diagnose problems, and design interventions “to move from a problematic state to something more normal”

(Cooperrider & Godwin, 2010, p. 11). AI shifted the paradigm of research from a clinical stance to a transformational perspective interested in discovery, understanding, and innovation (Cooperrider & Srivastva, 1987). Whitney et al. (2010) define AI as:

> . . . The study of what gives life to human systems when they are at their best. It is an approach to human and organizational change, and it is based on the assumption that inquiry into and dialogue about strengths, successes, values, hopes, and dreams are themselves transformational. (p. 5)

AI is based on the precept that organizations are living systems filled with a narrative history of times when they were thriving with potential, strength, and opportunity brought to life by the alignment of specific forces (Cooperrider & Godwin, 2010). An appreciative approach ignites imagination and inspiration revealing and fueling these life-giving forces to move an organization from its current state to an ideal state (Cooperrider & Srivastva, 1987). One version of the AI process, called the 4-D cycle, achieves this goal in four steps: appreciate what is (discovery), imagine what might be (dream), determine what should be (design), and create what will be (destiny or deliver) (Bushe & Kassam, 2005).

**AI versus problem solving**. The primary difference between the traditional problem solving approach and the appreciative one is that the focus remains centered on surfacing the life-giving core of a system instead of diagnosing its ills. This is not to say that AI ignores problems; it simply goes about eliminating problems through generativity (Bushe, 2010). If participants bring up problems when asked to recall their best experiences, the inquiry turns to helping them clarify what is missing that they want more of and how their organization would look differently if such components were in place. The generative approach stimulates creative thinking, passion, and positive contribution whereas problem solving assumes something is broken, fragmented, and needing fixing

(Cooperrider & Srivastva, 1987). An analytic mindset seeks to break up a problem into segments that can result in the formation of independent experts further fragmenting the system (Barrett & Peterson, 2000). Barrett and Peterson assert that problem solving discourages experimentation central to generativity and often breeds defensiveness that breaks down cooperative learning. It is a limited approach to learning when people look for what is considered feasible at the expense of inquiring into creative possibility. Cooperrider and Godwin (2010) exemplify this idea, stating "being the best error-reducer at best helps you stand in place; it will never produce the ideas that can take an industry by surprise, turn on an entire workforce, and establish distinctive leadership" (p. 50).

**A whole-system approach**. To look for problems results in finding them; to look for possibilities is to open an expansive capacity to see beyond the boundaries of conventional thinking and open new potential (Barrett & Peterson, 2000). Amplification of strengths has the ability to help organizations and communities to not only perform, but transform (Cooperrider & Godwin, 2010) resulting in high performance systems that surpass limitations of what appears reasonable by analytical standards (Barrett & Peterson, 2000). The nature of complex interactions inherent in whole systems cannot be deconstructed into parts, systematically repaired, and reassembled into a high performance result. Such thinking goes against systems theory and has a higher chance of unintentionally producing new problems down the line.

**A democratic approach**. AI employs a whole system, democratic approach to change. Leaders are moving from authoritative to collaborative practices (Whitney et al. 2010). Using a democratic, high-involvement method is beneficial for three key reasons. First, AI is capable of producing high levels of interactive discourse compared to creative problem solving where participants tend to direct their responses to the facilitator or

independently record ideas (Peelle, 2006). The co-constructive nature of the AI process surfaces social knowledge within the collective (Cooperrider & Srivastva, 1987) and combines it with compelling ideas and images (Bushe & Kassam 2005). This active engagement of collectively designed change can unleash an unrelenting commitment (Cooperrider & Godwin, 2010).

Second, the more people become involved in the inquiry, the more generative AI is likely to become (Bushe, 2010). The inclusion of people from different backgrounds, perspectives, and ideas engaged in dialogue together encourages them to think creatively and question previously held notions (Barrett & Peterson, 2000; Whitney et al., 2010). Generative exchange of knowledge and ideas promotes joint discovery (Barrett & Peterson, 2000; Whitney et al., 2010).

Lastly, culture can be reshaped when ideas, beliefs, meanings, and intentions initiate action and allow people to change conventional codes or idea systems (Cooperrider & Srivastva, 1987). In an AI conducted with a rural school district, Calabrese, Hester, Friesen, & Burkhalter (2010) witnessed a shift from a defensive, isolationist, and reactive culture to one of trust, hope, and collaboration. Participants' self-transformation helped them to, "re-discover competence, regain confidence, become empowered, learn to value and respect colleagues, and dare to dream of a transformational future" (p. 260).

Its capability to shift from a mode of problem solving to one of highly participative, generative dialogue that fundamentally changes a culture makes AI a methodology which potentially leads to transformational outcomes.

**A method of transformation**. Transformation can begin immediately after the first phase of the 4-D cycle as was shown in the rural school district. Narratives can serve

to strengthen relationships by encouraging non-judgmental communication, mutual respect, and acceptance of diverse perspectives necessary to develop collaboration (Peelle 2006). Calabrese et al. (2010) reported increased self-esteem in participants who left believing they were agents of change and no longer victims of circumstances beyond their control. The acknowledgement of positive contributions between participants builds a sense of interconnectness, stimulates social capital, and creates ambassadors of change (Calabrese et al., 2010; Moody, Horton-Deutsch, & Pesut, 2007).

**Social constructivism**. Essentially, the way we think and approach change is socially constructed. Social constructivism states that social reality created through human behavior, sociotechnical architecture, and culture is ever-shifting (Watkins & Mohr, 2001). Social constructivism is grounded in five principles that elucidate the way reality is defined given the focus of an inquiry, selected language, formulation of positive imagery, and anticipated outcomes which inspire action.

***The constructivist principle***. According to the constructivist principle, reality is co-constructed within social systems because what is believed to be true affects our perception and action (Bushe & Kassam, 2005; Watkins & Mohr, 2001). Cooperrider and Whitney (1999) maintain that organizations are human constructions where knowledge and design are interwoven. Inquiry determines what is found and as such, the objective is to adjust the thinking to enable the change rather than try to adjust the object to be changed (Bushe & Kassam, 2005; Cooperrider & Srivastva, 1987).

***The simultaneous principle***. The simultaneous principle asserts that inquiry itself is an intervention and the questions themselves, are fateful (Bushe & Kassam, 2005; Cooperrider & Whitney, 1999). Inquiry and change occur simultaneously (Cooperrider & Whitney, 1999; Watkins & Mohr, 2001).

***The poetic principle***. The poetic principle describes organizations as open books, coauthored by members in a dialogue of stories shared each day (Bushe & Kassam, 2005; Cooperrider & Whitney, 1999; Watkins & Mohr, 2001). Social tapestries of meaning and understanding are woven through the sentiments of words, unfolding continuous storylines (Bushe & Kassam, 2005; Cooperrider & Srivastva, 1987).

***The anticipatory principle***. The anticipatory principle is the notion that expectation of a particular outcome is formed the moment an image of the future is conjured. Barrett and Peterson (2000) illustrate the anticipatory principle in their citation athletic research where visualization of a successful golf swing or bowling strike influenced that outcome beyond chance. The importance of focusing on positive images so that they may lead to positive actions is not to be underestimated (Cooperrider & Whitney, 1999).

***The positive principle***. The positive, described as hope, excitement, joy, inspiration, caring, camaraderie, and purpose to name a few, are the glue of social bonding that sustains momentum necessary to create change described in the positive principle (Bushe & Kassam, 2005; Cooperrider & Whitney, 1999). The positive principle of AI has been in question by some like Bushe and Kassam (2005) who have found that positivity was not enough to produce transformational change in a system. They contend that in order for change to be transformational, the system must be generative and experimental in its application of formulated ideas and models. However, what might be overlooked is that trust and social capital built through the positive principle allow for more experimentation and generative creativity to emerge (Cooperrider & Godwin, 2010). Fear-based change kills innovation whereas a focus into the positive generates energy.

**Positive emotion**. Fredrickson (2004) has spent considerable time exploring the value of positive human emotion and the way it broadens scope of attention, cognition, and action. The broaden-and-build theory affirms that positive states promote playfulness and exploration leading to increased flexibility, creativity, integration, expanded perception, openness to information, and efficiency. By contrast, negative emotions generate narrowed mindsets which lead people to become stuck in predictable behaviors. The positive not only makes people feel good but promotes generative thinking and resilience.

**Generative capacity**. The positive alone, however, does not lead to change although it is a springboard for generative ideas (Bushe, 2010). Positivity opens the door to expanded perception but does not always lead to the combining of new ideas and thoughts into novel action. Persistent chatter about a particular idea, shifts in discourse, and novel sense-making can indicate the presence of a generative idea. The juxtapositions of words or concepts called generative metaphors follow an open mindset of *yes/and* as opposed to a limited one made by a dichotomous *either/or* mindset (Moody et al., 2007). This tends to happen most often in the discovery and design phases and helps participants address complex problems (Bushe, 2010). Evidence of generativity significantly affects the degree of change.

**AI as social innovation**. Social innovation is the ultimate potential of AI realized when what is working in an institution is carried forward as a vehicle for societal growth (Cooperrider & Godwin, 2010; Moody et al., 2007). Cooperrider (2008) challenges us to see every social and global issue as a business opportunity in disguise. Conceiving business as an agent of world benefit could become the new reality that eradicates seemingly unsolvable problems such as extreme poverty. However, this would occur only

if we turn our focus to the appreciative (Cooperrider & Godwin, 2010). Imagine a future agenda of positive education, positive families, positive economy, and building a positive planet—such goals would, "not only elevate and connect human strengths but serve to refract and magnify our highest strengths into society" (p. 34).

Today is a new frontier filled with opportunities to design change through building on collective strengths and best practices by identifying core, life-giving forces of organizations and communities. AI offers the tools to create a social tapestry from generative dialogue which can be leveraged globally with the help of virtual platforms. Another generative methodology originating from the realm of design compliments and reinforces the generative component explored in the strengths-based approach of AI.

## Theoretical Roots of Design Thinking

Design is rich in a multitude of perspectives ranging from product design to skills and strategies but what may be most important to note is that is not just an artifact or end result; it is also a process (Mingfen, 2000). Banathy (1992) defines design broadly as a purposeful action seeking to conceptualize and create novel phenomena through a decision-oriented, disciplined inquiry. "Moving from an existing condition to a preferred one" is a widely accepted definition of design used by Milton Glaser and originated by Herbert Simon (as cited in Berger, 2009, p. 242). Berger outlines the general process of design, starting with a deep dive into research exploring human wants and needs, making visual representations by using sketches and models to portray the concept to others, and using feedback to build on the initial idea into a refined product or service.

**History of design thinking**. The history of design reaches back to the mid 1960s when the complexities of emerging technology which spanned across multiple disciplines called for structure to the design process, allowing designers to communicate the process

to others (Beckman & Barry, 2007). The process evolved from a mechanistic means of breaking down problems into smaller parts for experts into a social process that included a diversity of players other than experts. Mingfen (2000) details the transformation of design by comparing the synthesis of systems thinking by Banathy and Senge:

> First Generation Design: The designer is an outside expert who creates a future system and gives it to the clients for implementation.
> Second Generation Design: The designer is an outside expert who has limited interaction with the client while designing a future system and turns it over to them for implementation.
> Third Generation Design: The designer is an outside expert who has a higher degree of interaction with the client, uses input and feedback throughout the design process, and may assist with implementation.
> Fourth Generation Design: The designer functions as a learning facilitator to foster design competence in clients as they learn, design, and implement for their wants and needs throughout the process. The designer participates with the clients, no longer "doing to" or "doing for" them. (p. 215)

Design thinking was borne out of the socially oriented discipline of design and could be labeled Third Generation Design, according to Banathy and Senge (as cited by Mingfen, 2000), except that it emphasizes an us-with-them approach to the designer-user relationship (Brown & Katz, 2009). It first appeared in the 2001 work, "The Art of Innovation" by Tom Kelley, general manager at the prominent design firm, IDEO (as cited by Bell, 2008). Tim Brown, chief executive at IDEO, details his account of how the term *design thinking* was coined in conversations with founder, David Kelley, who used it to describe what designers do (Brown & Katz, 2009). Design thinking is now used as readily to tackle problems from obesity to business to climate change. This is a far cry from the previously understood definition of design to mean the latest widget.

**The design thinking process**. The exploratory process of design thinking is non-linear as it makes its way through phases of innovation (Beckman & Barry, 2007; Brown & Katz, 2009; Teal, 2010).

> We can think of them as *inspiration*, the problem or opportunity that motivates the search for solutions; *ideation*, the process of generating, developing, and testing ideas; and *implementation*, the path that leads from the project room to the market. (Brown & Katz, 2009, p. 16)

The phases, or as Brown likes to call them, overlapping spaces, of design thinking are explored in greater detail to surface the basic assumptions of design thinking.

**Understand**. Design thinkers use the notion of *human-centered* referring to the ability to "construct ideas that have emotional meaning and functionality" (Brown & Katz, 2009, p. 4). "The focus is on making people the source of inspiration and direction for solving design challenges" (Carroll et al., 2010, p. 41). In order to fully understand people, it is necessary to immerse within the world of the human experience, to consult with those most near the problem or opportunity that are able and motivated to respond, with experts who can act as an additional resource and conduct research to gain insight. It assumes that design can only be successful if it has engaged the roots of meaning within the system it intends to innovate. Beckman and Barry (2007) make the point that an understanding of why people do the things they do requires an intimate look into culture if design is to determine aspects like product choice, usage, and resistance. In addition to explicit and tacit needs of a consumer or client, design thinkers must ask the right questions to bring into perspective elements of the end-user's environment, social factors, market adjacencies, and emerging trends to ensure that innovations are balanced in technical, business, and human needs (Holloway, 2009). Brown and Katz (2009) addresses these elements as feasibility (e.g., Can you deliver it?), viability (e.g., Can you make money with it?), and desirability (e.g., Will people want it?). As a multitude of factors are taken into consideration during this first phase of deepening understanding, the next phase of observation begins.

**Observe**. Design thinkers spend time observing the user's behavior or interactions, asking questions to clarify understanding, and reflecting on what they see (Carroll et. al, 2010). Artifacts such as pictures, diagrams, sketches, video clips, and photographs are placed around the design space so that design thinkers deepen their empathetic understanding (Holloway, 2009). Beckman and Barry (2007) take observation a step further to describe the fundamental principles which come from ethnography: exploring the user's natural setting, seeing the world through their eyes, empathizing with them, staying for extended periods of time, and participating in cultural life. Developing empathy is key and one of the foremost skills of successful design thinkers. This empathetic understanding, developed in the observation phase, culminates into a point of view.

**Define**. The design challenge begins by combining the understanding of the users, that is who is being designed for, with the needs of the user, as well as insights gathered by the designer in the previous two phases of the process. Together, these define the scope of the design challenge stated as a design question often beginning with the words, *how might we* (Carroll et. al, 2010). Examples of design questions currently posted on the Open IDEO website (n.d.) include: "How might we better connect food production and consumption?", "How might we increase the number of registered bone marrow donors to help save more lives?", and "How might we improve maternal health with mobile technologies for low-income countries?" The design question steers the direction of the ideas generated in the ideation phase.

**Ideate**. During this phase design thinkers collaborate, go for quantity, and embrace a non-judgmental openness while they brainstorm hundreds of ideas (Carroll et. al, 2010). Collaboration is encouraged as the popular IDEO phrase, "All of us are smarter

than any of us" denotes. This generative approach allows the emergence of new ideas to be built upon previous ideas or what is termed *melioration*. Passig (2007) defines melioration as the merging of two different concepts to create a whole new concept. The process of abduction, defined as the inference of reasons based on the observation of consequences (Magnani, 2004), gives design thinkers the ability to move from what is known as possible into the realm of the uncharted and see possibilities of what might be (Berger, 2009). The common colloquialism "think outside the box" captures this idea whereas thinking inside the box refers to a common form of sense-making (Wylant, 2008). Abductive reasoning is later supported by deduction to trace the consequences of ideas and induction, the testing of those ideas (Patokorpi, 2006), in the next phases of design thinking.

**Prototype**. "If the design process starts with questioning what currently exists and then progresses to the next stage of seeking out fresh possibilities, at some point the designer must begin to communicate those new possibilities to others" (Berger, 2009, p. 72).

Prototyping accomplishes two tasks: first, it becomes a platform on which ideas are experimented as they are assembled into a visual representation or model and second, the visual representation is able to effectively communicate the idea to others better than words can (Berger, 2009; Brown & Katz, 2009).

During the prototyping phase, design thinkers create rough representations of ideas using an assortment of two or three dimensional materials to try them out and modify according to what they learn from testing them (Berger, 2009). This phase alternates quickly with the testing phase to create a succession of refined prototypes (rapid prototyping). Mistakes and prototype failure are looked upon as an inevitable part

of the process and is the reason why the first prototypes are nothing more than a quick sketch or scotch tape holding together a foam core model. They are made to be easily modifiable (Brown & Katz, 2009).

Prototypes also have the ability to tell a story as their visual representations give far more impact than a verbal description. Berger (2009) asserts that a "disproportionate amount of brain power is dedicated to visual processing [allowing us to] acquire far more information through vision than all other senses combined" (p. 75). Those who are charged with the role of giving feedback, like users, are able to gain a clear sense of the designer's ideas through the use of prototypes. This is why good prototypes raise questions and stimulate discussion (Holloway, 2009).

**Test**. The testing phase is a process of learning what works and what doesn't from feedback provided by users (Carroll et. al, 2010). Iteration helps the design thinker to come up with new ideas and modifications that bring the prototype closer to achieving its intended purpose. After an unknown number of tests and evaluations, the prototype is ready for final design and delivery. The delivery process may include additional consideration by the design thinker as the design reaches its intended audience so that it may be introduced in an enticing and useful manner. Brown and Katz (2009) give a good example of such considerations as informal dress attire of store employees who would sell the cruiser bike intended for the less-serious, just-play cyclist in effort to create a less intimidating, more welcoming store climate.

Design thinking is clearly a culture of disciplined adhocracy, welcoming disruptive innovation by means of risk-taking, openness to wild ideas, and defining the previously non-existent innovation. Its ability to construct a world through abductive reasoning and melioration while keeping connected to the social roots of human-centered

design gives it a versatile edge, applicable to multiple disciplines whether it means redesigning a library to be more research friendly or creating the next generation of environmentally friendly modes of transportation.

**The Process of AI.d**

What is appreciative innovation? The Merriam-Webster online dictionary defines *appreciate* as taking notice of value, worth, or quality and to increase in value ("Appreciate," 2011). Likewise, *innovation* is defined as the introduction of something new; a new idea, method, or device ("Innovation," 2011). Therefore, appreciative innovation introduces something new through taking notice of value, worth and quality thereby increasing the value of an idea, method, or device. Cooperrider and Godwin (2010) have created a model of Innovation-Inspired Organizational Development. It is a convergence of several fields including AI and design thinking, bringing the notion of appreciative innovation to life.

> . . . We believe the outcomes will define the next episode in creative capitalism and, ultimately, will determine the well being of our imperiled planet. Hence the exciting question is this: "How do leading companies, associations, and markets turn pressing global and social issues . . . into bonafide business opportunities, in ways that vitally and consistently benefit both business and the world?" (Cooperrider & Godwin, 2010, p. 36).

AI.d lives in the spirit of Innovation-Inspired Organizational Development and has merged the best of AI and design thinking. Like the 4-D model, AI.d follows the phases of discover, dream, design, and deliver (or destiny) with an added emphasis in design thinking. The final phase of AI.d, valuate, accentuates the idea that reality is emergent, complex, and co-constructed during multiple iterative cycles. The AI.d model shares theoretical similarities with AI and design thinking such as empathy, generative capacity, using a positive lens, and emergence. However, it also departs to include user-

as-designer and embraces the notion of continuous change with valuation (Watkins & Mohr, 2001).

**Empathy**. Both AI and design thinking use empathy as a means to make connection. In the discovery phase of AI, participants engage empathy through dialogue. In paired interviews, each person takes turns encouraging the other to relive the thoughts and feelings that took place during a time when things were at their best. The interviewer uses empathy to step into the shoes of their partner and support the dialogue process by asking questions to reveal story details that deepen the interviewee's experience. Likewise, the first phase of design thinking is similar in that designers observe and seek to understand their users' implicit and explicit wants and needs. Empathy serves two functions: it allows members to step outside themselves and embrace new perspectives which supports the generative function (Bushe, 2010; Peppler & Solomou, 2011) and it nurtures relationships necessary to cohesive collaboration and community building (Berry, 2011; Kauppila et al., 2011; Moffat & McLean, 2009). AI.d employs paired interviewing to inquire into the history of best experiences within an organization or community, surface personal qualities and values, and leverage strengths of members in such a way as to generate empathy.

**Positive lens**. AI and design thinking emphasize the use of a positive lens to bring out strengths or reframe problems. Turning to the positive opens the mind to the creative. A positive lens fuels the embrace of experimentation, empowers learning from mistakes, and channels innovation through constraints (Cooperrider & Godwin, 2010). The world is either full of problems or opportunities and AI and design thinking are interested in the latter.

> Business has the technologies to redesign the world energy economy and stabilize climate change. It has the capacity to eradicate extreme poverty within a generation or two. It has new, emerging approaches to turn all of these issues, and many more, into business opportunities for tomorrow's industry leaders. (Cooperrider, 2008, p. 38)

Like designers, participants in the dream phase of the virtual AI.d process create versions of possible futures they would like to see transpire in their community. A positive lens helps to articulate a succinct possibility statement which is then translated into a design question (e.g., "How might we . . . "), positively framing the challenge. "Management's greatest moments are when the call to collective action is clearest—when we turn our attention from the question, 'What could we . . . ?' to the question, 'How might we . . . ?'" (Cooperrider, 2008, p. 38).

**Generative**. Common to both AI and design thinking is the use of generative capacity which is central to the design phase of AI.d. Participants engage in *yes, and* thinking to combine two ideas together to make a generative metaphor (Bushe, 2010; Moody et al., 2007). Johnson's (2009) game, *Creative Radical* encourages generative metaphor by allowing participants to build on the ideas of others and serves as the brainstorm session used in the ideate phase of design thinking. Peppler and Solomou (2011) found that idea formulation emerges as part of immersion in a narrative. Feeding back during the prototype process presents an opportunity for participants to engage in generative dialogue. "The use of social networking technology, it is suggested, can serve as a valuable means of enabling generative dialogue and conversation" (Moffat & McLean, 2009, p. 535).

Virtual AI.d utilizes asynchronous communication in social media environments to allow participants to express ideas completely without interruption (Berry, 2011) and build on the ideas of other participants.

**Emergent**. Design thinking and AI are both emergent processes on which AI.d is built. Bushe and Kassam (2005) express how *planned change* appears to be an oxymoron but that cases of transformational change adopted an improvisational approach to change. Throughout the first three phases of the virtual AI.d process, strengths and ideas culminate into a shared vision which is then translated into actionable steps in the delivery phase. Time frames are honored and actions are clear but with the understanding that the future is fundamentally unknowable and thus change is more like an improvisational dance.

**Valuation**. AI.d plays on the notion of continuous change in that even when the initial vision or project outcome has been reached, aspects of the environment continue to shift which may redefine or create a whole new game. Typically the work of designers is project-based and as such, relies on a series of feedback loops until the end product is reached and then evaluated against success-defining criteria. Valuation is different from evaluation as associated with feedback (Watkins & Mohr, 2001). Instead, it seeks to address the continuity of the change process by cycling the first four phases of the AI process and revisiting prior phases while in valuation. A series of questions guide users through the prior steps with an appreciative lens to build on current successes. This serves to encourage novel ways of looking at the present situation and how to further generate support or others' expertise that might be included. Figure 3 depicts the five phases of the virtual AI.d process and how each is recycled in the phase of valuation.

Evaluation works by comparing a result to a standard in an attempt to measure how close one is to an end product. In valuation, the process continues to build on the best of what is discovered. Like a fractal, a mini-AI.d process lives within the phase of valuation. The approach of valuation is improvisational rather than implemental. Bushe

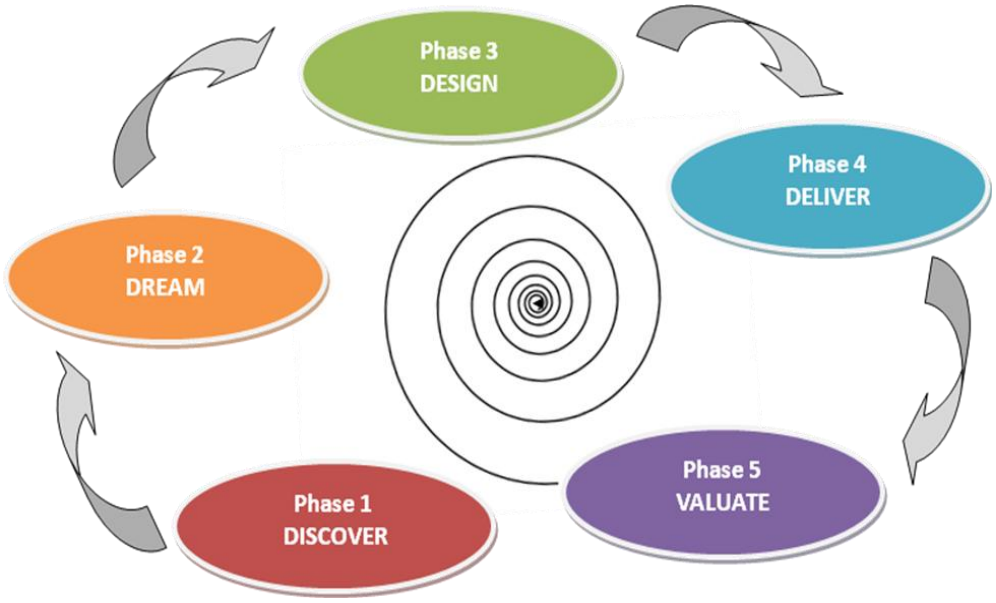



**Figure 3**

**The Five Phases of the Appreciative Inquiry-Design Process**

and Kassam (2005) define a transformational case as improvisational "where there were numerous, diverse ideas for changes pursued by various actors" (p. 171) and "rather than trying to implement something, leaders looked for where people were innovating and helped them along when they could" (p. 9). Improvisation views tangible results as side effects of a larger intangible change. This is different from implementation where a tangible result concludes and defines the impact of the intervention.

**User-as-designer**. AI.d epitomizes what Bushe and Kassam (2005) mean when they say that transformational cases: (a) foster a collective sense of what is needed, (b) employ a means of how to achieve it, (c) align with people's motivation, and (d) encourage them to act on their own initiative to make it a reality. The only means of achieving this is to turn people into designers of their own making and let them loose in collaboration. Who better knows the system and its needs than the people who live within

it? This is not to dismiss the fact that outside expertise can be very helpful and in actuality, AI.d emphasizes bringing in external collaborators in the valuation phase. In AI.d, fourth generation design where the users become the designers and the designer professional serves not as an expert but instead as a coach to supports clients' creative competence (Mingfen, 2000). Such is not the case yet for design thinking as indicated by Brown and Katz (2009):

> My colleague Jane Fulton Suri has even begun to explore the next stage in the evolution of design as it migrates from designers creating *for* people to designers creating *with* people to people creating *by themselves* through the application of user-generated content and open-source innovation. The idea of Everyman-the-Designer is a compelling one, but the ability of consumers to generate breakthrough ideas on their own—as opposed to replicating existing ideas more efficiently and cheaply—is far from proven. (p. 59)

To the contrary, Cooperrider and Godwin (2010) affirm the Everyman-Designer concept.

> Coupled with new web technologies, there are now AI Summits and IBM Jam Sessions with 10,000 to over 60,000 people combining their strengths and drawing from the positive core of the system. Often these sessions are infused with IDEO-like design methods, with the assumption that design methods are too powerful to be only used by designers—everyone is a designer. (pp. 34 -35)

AI.d is a tool with the intention of making the Everyman-Designer concept readily available to all organizations and communities. It addresses a question asked by Bushe (2010) on how to engage discussion such that it produces agreement and alignment on a design statement without needlessly laborious meetings that drain generative energy from the group. It is possible for users to become designers and spontaneously initiate their own ideas into prototypes that embody the overall vision for the group.

**Intentions of AI.d**. Virtual AI.d is first and foremost, a practical tool for change. It embraces the ideals of the Innovation-Inspired Organizational Development model

which starts at the microcosmic level (the individual), increases to focus on transformational uses of the system by magnification of strengths, and makes way for positive organizations to create a positive society as a whole (Cooperrider & Godwin, 2010). Its method applies learnable skill sets which make use of the strengths, knowledge, and resources of its participants. The combined power of new knowledge and recognition of strengths inspire innovative action without waiting for approval from the top. This is confirmed to be of utmost importance by Bushe and Kassam (2005) in their assessment of what makes AI transformational. The power of user-as-designer puts the capacity of change to work in the imaginative minds of those who live in the very system they wish to transform. Everyone is a designer and a change maker and with the help of technology, virtual communities and teams can unleash their appreciative innovation.

**Summary**

The purpose of this study is to investigate the AI.d method with globally dispersed members of a community while using social media as a virtual platform for appreciative innovation. Specifically, research on AI.d will measure its capacity to: (a) increase virtual interaction (b) foster collaboration, (c) cultivate relational closeness, (d) generate innovative ideas, (e) execute effacious goals, and (f) build on the skill set of collaboration, relationship building, innovation, and goal execution.

The virtual AI.d process allows participants the freedom to choose their own technology to support parts of the collaboration while using Facebook as the primary mode of virtual interaction. Karpova et al. (2009) remark that most studies employing virtual methods restrict participants' autonomy to a predefined virtual platform. This research has given its participants choice of virtual communication modes for

collaboration. In chapter three, research design, participants, instrumentation, data collection, and analysis are examined in detail.

# Chapter 3

## Research Methodology

In this chapter, the research design, sample, participants, development of instruments used, data collection and analysis are explored. The purpose of this research was to apply AI.d, a synthesis of AI and design thinking, in a virtual community. The focus was to investigate the virtual AI.d process and how it enables members of virtual communities to assemble for an expressed purpose or objective, facilitate collaboration, enhance relationships among members, become their own self-directing designers exploiting innovative practices, and execute effacious action on desired goals. Specifically, the study aimed to discover how the virtual process of AI.d affected virtual interaction, collaboration, relationship, goal efficacy, skill building, and innovation.

### Research Design

Qualitative and quantitative methodology was employed while conducting the 6-week virtual process of AI.d using Facebook as a social media platform. Quantitative data were collected using surveys administered before and after the virtual AI.d process to measure three dependent variables. The pre-survey collected baseline data for virtual interaction, effective collaboration, and relationship development. In addition to measuring any change in the first three variables listed, the post-survey measures three additional variables. Empathy, as an additional measure of relationship, goal efficacy, and skill development are analyzed. The final variable, innovation, is measured both quantitatively and qualitatively during the last phases of the virtual AI.d process. Final data analysis will determine if statistical significance is found.

**Virtual interaction**. Virtual interaction is the quantity of virtual exchanges with one or more other members of a community. This variable is measured by reporting the

frequency of posts made by participants to other SRF young adults on Facebook personal profiles and SRF young adult Facebook groups.

**Collaboration**. Collaboration refers to a process where stakeholders both within and outside a group, organization, or network formulate, jointly make, and mutually carry out decisions interdependently (Thompson, Perry, & Miller, 2007; Koppenjan, 2008). Another aspect of this definition is the degree to which stakeholders become aware and take best advantage of their collective skills and available resources. Pre and post-survey questions inquire into the nature of young adult community members' collaborations, communication, resource sharing, and collective action execution and can provide comparisons of post-process data to baseline data to determine if any changes occurred.

**Relationship**. Quality of relationship refers to the level of empathy shared between participants. Empathy is an interpersonal process of self-awareness and awareness of another's feelings, perspectives, and experiences (Gerdes, Segal, & Lietz, 2010). Pre and post-survey questions inquire into the nature of young adult community members' relationship building and empathy to one another during the discovery phase of the virtual AI.d process and comparisons between baseline and post-process data can determine if any changes occurred.

**Goal efficacy**. Goal effectiveness refers to how well participants are able to divise actions from their prototypes, define goals, take actionable steps within a period of specified time, observe measurable progress of individual and collective actions toward goals and create meaningful, sustainable change. Combined data from the post-survey and input from participant postings to the group during the delivery phase provide qualitative data to determine how well subjects implemented their vision into measurable results.

**Skill development**. Participants are asked to rate their skill growth in areas of collaboration, relationship building, innovation, and goal execution. The ability of virtual AI.d to affect the skill development of participants is crucial to determining its long-term effectiveness in building the capacity of Everyman-Designers.

**Innovation**. Qualitative data analysis methods are used to determine the presence of innovation through the evolution of an idea to executed result. Innovation is measured both qualitatively by idea elaboration and quantitatively by idea fluency and flexibility.

***Elaboration***. Elaboration is the realization of an idea which is transformed into concrete form (Kim, Lee, Park, & Jeong, 2009). Photos of tangible prototypes taken at the design summit in addition to virtual prototypes such as videos and pictures posted online by participants will serve to document the evolution of an idea from vision, to prototype, to implemented action as a measure of elaboration.

***Fluency and flexibility***. Fluency is the number of responses given the same information or within a particular category (Kim, et al, 2009). Flexibility is the ability to shift the set or change catagories. For example, a brainstorm looking for ideas to increase sustainable behavior might entertain ideas on recycling including product packaging, building materials, and reusable items. Other categories that relate to sustainable behavior might turn to ways other than recycling such as energy conservation of water and electricity. This would demonstrate the ability to shift sets or consider other categories as part of a solution.

During the design phase, exchanges of ideas in the *yes, and* creative radical brainstorm taking place virtually and at the design summit are counted and sorted into catagories to measure fluency and flexibility. The number of ideas generated indicates the

level of fluency and the number of idea sets or categories indicates the level of flexibility as a quantitative measure of innovation.

**Sampling Methodology**

The method of chain sampling was used to assemble a group of SRF young adult community members. Global SRF young adult members were invited to participate in the AI.d study on Facebook and joined what is referred to as a *secret group*. Facebook identifies three group classifications and unlike open and closed groups, those which are secret cannot be found in searches, do not make content visible, and do not disclose the members of the group. Participants were asked to invite other SRF young adults they knew to participate in the study. Participation was made optional, allowed subjects to participate as much or as little as desired and with the expressed option to discontinue the study at any time.

**Participants**

Participants chosen for this study consisted of global members of the SRF young adult community. The goal of SRF young adult community is to develop global connections and create an exchange of spiritual fellowship. Some members expressed having little access to young adult groups and activities and others would like to widen their network. Efforts thus far to foster such connections have affected little change. As an informally connected and operating web of international community groups, many who are online Facebook members, this population served as an ideal candidate with which to conduct virtual collaboration efforts and investigate the virtual AI.d process.

The SRF young adults are not directly affiliated with the non-profit institution of SRF and are an informal, self-directed community. Young adults are classified as being

between the ages of 18 and 39 and comprise the community of devotees who follow this spiritual path. Table 1 outlines the demographics of participants in this study.

**Table 1**

***Participant Demographics***

| Demographic | N | % |
|---|---|---|
| GENDER: | | |
| Male | 20 | 63% |
| Female | 12 | 38% |
| AGE GROUP: | | |
| 18-22 | 4 | 12% |
| 23-26 | 10 | 30% |
| 27-30 | 11 | 33% |
| 31-34 | 5 | 15% |
| 35-39 | 3 | 9% |
| LENGTH OF MEMBERSHIP: | | |
| Never Participated | 3 | 9% |
| Less than 1 Year | 6 | 19% |
| >1 to 2 Years | 7 | 22% |
| >2 to 3 Years | 3 | 9% |
| >3 to 4 Years | 3 | 9% |
| >4 to 5 Years | 3 | 9% |
| >5 to 6 Years | 1 | 3% |
| More than 6 Years | 6 | 19% |
| MEMBERSHIP TYPE | | |
| Not a Lessons Student or Kriyaban | 0 | 0% |
| Lessons Student | 6 | 18% |
| Kriyaban | 27 | 82% |
| YOUNG ADULT GROUP ATTENDANCE: | | |
| Never Attended | 4 | 12% |
| 1 to 4 Times a Year | 9 | 27% |
| 5 to 9 Times a Year | 11 | 33% |
| 10 to 17 Times a Year | 3 | 9% |
| 18 to 24 Times a Year | 3 | 9% |
| More than 24 Times a Year | 3 | 9% |
| TEMPLE ATTENDANCE: | | |
| Yes | 28 | 85% |
| No | 5 | 15% |

*N* = 33

Thirty-five participants between the ages of 20 and 39 (mean = 28; mode = 30) signed up for the study. Of the participants who completed the pre-survey, there were 20

women and 12 men. Participation in a young adult groups ranged from never having attended a meeting to having participated for over 6 years and 50% indicated they had been active members less than 4 years. All participants reported having at least signed up for formal SRF lessons and 27 had been initated into kriyabanship, a higher level of yoga meditation. Twenty-eight participants indicated that they attend the young adult groups that meet at temples, of which 20 participants indicated that they attend between one and nine meetings a year. Locations where young adults choose to congregate for meetings included California (Richmond, Sacramento, Encinitas, Lake Shrine in Pacific Palisades, and Hollywood), Arizona (Phoenix), Oregon (Portland), Germany (collectively known as Youth of the Golden Age), and at the yearly convocation held in Los Angeles. Most participants had no prior experience with the processes of design thinking or AI as indicated in Table 2.

**Table 2**

***Participant Prior Experience***

| Experience Level | N | % |
|---|---|---|
| PREVIOUS DESIGN THINKING EXPERIENCE: | | |
| Never Used It | 25 | 76% |
| Used One Time | 5 | 15% |
| On Occasion | 3 | 9% |
| Regularly | 0 | 0% |
| PREVIOUS AI EXPERIENCE: | | |
| Never Used It | 28 | 85% |
| Used One Time | 2 | 6% |
| On Occasion | 3 | 9% |
| Regularly | 0 | 0% |

*N* = 33

Global Young Adult community members who participated in this study understood that the non-profit, SRF was not affiliated with this study and that

participation was voluntary and may be withdrawn at any time without risk or penalty. See Appendix A for a copy of the Waiver of Informed Consent form.

**Instrument Development**

**Pre-survey**. A 12-item scale was developed by the researcher to create the pre-survey (see Appendix B) for purposes of this research. The first page of the online survey describes the study and details the terms of participation and participant rights. In lieu of a signed consent form, on the first page of the survey participants are able to click on a box to provide their consent and acknowledgement of conditions before continuing with the survey. The survey begins with two demographic questions (age and gender) follwed by two questions regarding the extent of participation in the online SRF community. The next two questions inquire into their familiarity and useage of AI and design thinking activities similar to ones associated with AI.d to account for possible variance in the data.

Next, virtual interaction is measured by two questions that probe into the frequency of participants' virtual online interaction with other young adult community members and membership groups. The last two sets of questions ask the participant to use a six-point Likert scale from strongly disagree to strongly agree, with the option of not applicable. A set of 19 questions inquire into the collaborative nature of the the global young adult community and are divided into 4 subscales: charter alignment, communication, resource usage, and collaboration effectiveness. The final set of six questions ask the participant to rate the quality of relationship to other associated young adult community members using two scales: creation of relationship and relationship interaction.

**Post-survey**. A 12-item post-survey was developed by the researcher for purposes of this research. See Appendix C for a copy of the post-survey. The opening of the survey

repeats questions to assess virtual interaction, collaboration, and quality of relationship to other associated Young Adult Group members. Two additional scales, empathy and relationship building, are added to the post survey to measure relationship.

Participants are then asked whether they attended the design summit and if so, to rate the extent that the summit expanded creative collaboration and action planning. Efficacy of individual actions taken, progress made upon set goals, and overall contribution to the SRF young adults community questions constitute the next set of five questions. The same six-point Likert scale from strongly disagree to strongly agree, with the option of not applicable was used. In the last set of four questions, participants are asked to rate their skill growth in the areas of collaboration, relationship building, innovation, and goal execution as a result of experiencing the virtual AI.d process using a four-point Likert scale from not at all to significantly, in addition to not sure. Table 3 outlines the variables measured in the study.

**Table 3**

***Variables Summary***

| Variable | Pre-Survey Items | Post-Survey Items |
|---|---|---|
| Virtual Interaction | 9, 10 | 2, 3 |
| Collaboration Subscales | 11 | 4 |
| Charter Alignment | 11_1, 2, 3 | 4_1, 2, 3 |
| Communication | 11_ 7, 10, 15 | 4_7, 10, 15 |
| Resource Usage | 11_8, 11, 12, 13, 14, 16 | 4_8, 11, 12, 13, 14, 16 |
| Collaboration Effectiveness | 11_5, 6, 18, 19 | 4_5, 6, 18, 19 |
| Relationship Subscales | 12 | 5 |
| Creating Relationship | 12_1, 2, 6 | 5_1, 2, 6 |
| Relationship Interaction | 12_3, 4, 5 | 5_3, 4, 5 |
| Empathy | -- | 5_9, 10, 11, 13 |
| Relationship Building | -- | 5_7, 8, 12, 14, 15, 16 |
| Goal Efficacy | -- | 8 |
| Skill Building | -- | 12 |
| Innovation | -- | -- |

## Virtual AI.d Process Development

The researcher adapted each phase of the AI.d process adapts exercises from AI and design thinking to create the virtual AI.d process. At the end of each phase, a personal reflection exercise is included in each phase of the process protocol, intended to help individuals continue to personalize further enhance skill development. The virtual AI.d process creation is explained briefly for each phase. See Appendix D for a copy of the virtual AI.d process protocol.

## Data Collection

Data were collected before and after the 6-week virtual AI.d process as shown in Table 4.

**Table 4**

***Virtual Appreciative Inquiry-Design Process Timeline***

| Time | Phase | Activity |
|---|---|---|
| Prior to start (2 wks) | Pre-Survey | Complete 15-minute online survey |
| Week 1 | Phase 1: Discover | Story telling and interviewing |
| | Phase 2: Dream | Theme surfacing |
| Week 2 | Phase 2: Dream | Future vision, possibility statements & reframe into design question |
| Week 3 | Phase 3: Design | Brainstorm session, idea reflecting, design team formation |
| 1 day | 2 Hr. Design Summit | (optional in person summit) Brainstorm, prototype and feedback session, and reflection |
| Week 4 | Phase 3: Design | Prototype representations and give feedback to design teams |
| Week 5 | Phase 4: Deliver | Devising action to test prototype, reporting via calendar (Once done, can go immediately to phase 5) |
| Week 6 | Phase 5: Valuate | Taking action, testing prototypes, reporting learning during the recycling through the phases |
| After completion (2 wks) | Post-Survey | Complete 25-minute survey online |

An online pre-survey was sent to all participants in the secret Facebook group created for the virtual collaboration to determine their virtual interaction, collaboration and quality of relationship with other members as a baseline for the community. The researcher emailed participants with a link to the 15 minute online pre-survey conducted through Qualtrics. The survey was open for two weeks with a reminder email sent after the first week to all participants. Copies of the emails sent are found in Appendix E.

**Phase 1: Discovery**. At the conclusion of the pre-survey, the first phase of the virtual AI.d process began and lasted one week. The first phase, discovery, is entitled Treasure Hunt and depicts the game-like task of hunting for and discovering the treasures or best experiences of other SRF young adults in the group. Participants were instructed to select someone whom they did not know or wished to know better and conduct a 20-minute interview by virtual means of communication such as video calling, messaging, or via telephone. Interview questions centered on the telling of the best, most exciting time being a part of the SRF young adult community, what personal values demonstrated in the story, what participants valued about themselves and their life, and strengths that they saw in themselves and others. After interviewing, participants were asked to post their partner's personal story to the secret Facebook group wall for all participants to read.

**Phase 2: Dream**. The second phase, dream, is entitled Vision Quest and began at the end of week 1 for the purpose of surfacing core life-giving qualities of the SRF young adults community. Core life-giving qualities are those qualities that give the community life and enable members to thrive. After sharing and posting partners' stories from phase one, participants were able to comment on similarities between each others' stories in phase two. A group poll was used to post all identified themes where participants then voted on five themes they believed were the most important in creating a thriving,

connected, meaningful and engaged community. Themes that received the highest amount of votes were announced before the start of week 2.

During week 2, participants were given instructions to complete a visualization exercise where core themes were expressed as contributions to the community in three wishes. Participants were asked to write their visions of their community's desired future as if the vision were already happening. Visions were saved as individual documents kept within the secret Facebook group page. Next, participants were instructed to capture the essence of their vision in one phrase to create their own personal possibility statement. Possibility statements are short phrases that capture the essence of what gives life to an organization or community. Personal possibility statements were entered into a poll where participants voted for their top three choices. The winning possibility statement that received the most votes was then reframed into a design question beginning with the words, "How might we . . . " A design question brings focus to an overarching objective that can be translated into prototypes, setting the stage for the next phase, design.

**Phase 3: Design**. Phase 3 is entitled World Invention and is a 2-week phase that began virtually and continued during an optional in-person design summit that was held at the end of the first week. The design phase opened with participants visiting each others' visions and expanding on them through a brainstorm process called Creative Radical, an exercise developed by Johnson (2009). The creative radical exercise captures the essence of the design thinker's radical collaboration, where a diversity of ideas come together and form out-of-the-box designs. Participants enacted the role of creative radical by making idea suggestions stating the words, "yes, and . . . " finishing with a new idea. By posting their *yes, and* ideas in the comment section below each vision, participants expand on others' visions. Participants were encouraged to help build the brainstorm by

posting their creative radical ideas in response to others' ideas. Additionally, they could inidicate others intriguing, silly, fun, or out there ideas they liked best by selecting *like* under that idea to show support. Those who felt drawn to a particular vision were directed to self-organize into one or more design teams. Participants were instructed to share which particular vision or set of ideas they were most interested in developing into prototypes. In effort to support team development, participants were then asked to come up with a team name, create their own design document where notes, ideas, and dialogue were to be shared, as well as a media album for prototypes to be posted.

Virtual prototypes are visual representations of ideas constructed using a variety of media such as pictures and videos. To ensure that prototypes actually expressed the original vision and possibility statement, additional instructions directed design teams to discuss how their prototypes transform their vision into reality.

The optional design summit began at the end of week 3 during the design phase. Eight participants attended the two hour design summit in person at the SRF temple in Pacific Palisades, California. Participants were told that craft and office supply materials would be provided and that they could bring their own materials to build tangible prototypes or electronic devices such as digital cameras and laptop computers to create virtual prototypes. See Appendix F for a copy of the email invitation for the design summit. The design summit began by picking up where participants left off at the end of week 3 of the design phase. Participants worked with each other to build on their present vision ideas before constructing prototypes. In design thinking fashion, each participant shared how their vision would fulfill the unified vision for a thriving, connected, meaningful, and engaged community. Next, each answered questions from other participants and a round of sticky note *yes, and* ideas were posted to that participant's

corresponding vision board. By providing each other with "I like . . ." and "I wish . . ." feedback ("I like this about your prototype and I wish it had . . . "), participants began developing actionable steps to test their prototypes. The design summit closed with personal reflections on the experience. Participants declared for what they wanted to be acknowledged to capture key learning. Lastly, those who attended the design summit were encouraged to integrate their learning by sharing their experience, insights, ideas, and prototypes with the rest of the virtual group.

Week 4 continued with virtual prototyping sessions during the design phase on Facebook. Individuals in design teams were instructed to create a prototype, or visual representation of their idea using videos, photos, drawings, or whatever media they liked. Team members provided feedback on prototypes to further develop the idea as it would apear in the real world. Then members invited other design teams to provide feedback on prototypes which could be successively modified to reflect new ideas.

**Phase 4: Deliver**. The action planning process began in the phase of delivery, entitled "Lift-off" during week 5. Design groups engaged in virtual discussions using any means available to them via phone, instant messaging on Facebook, or video conferencing. The purpose of these discussions was to clarify short-term steps to be taken by the end one week and long-term goals to be achieved by the end of two months to a year. Each participant was to devise individual actions they would take to test the prototype(s) they helped create and identify what they hoped to learn from their test. A Facebook document served as a group calendar instructed each participant to input their action(s) they planned to take and by when they these actions would be completed. The use of a visual calendar was intended to provide goal execution clarity, transparency and accountability during the delivery phase. Participants were asked to clarify what they

wanted to learn by testing their prototype during the delivery phase so they could expand upon their prototype implementation in the last phase of valuation. A team document served as a way to share these learning insights and prototype testing progress.

**Phase 5: Valuate**. Week 6 began the valuation phase entitled, "We Make It Possible." Valuation was explained to participants as a process of refining action through the lens of what worked and learning from that which did not. Participants were given four sections of reflection questions, one for each of the previous phases to support goal realization. Each phase of the virtual AI.d process (discovery, dream, design, deliver) were reexamined as actions recycled through the process. The participants were asked to share their vision and prototype with others within and outside the secret Facebook group in effort to raise awareness and generate support. Each participant was instructed to update their progress report, learning, and reflections on their corresponding design team document throughout the valuation phase. Although this research concluded the virtual AI.d process at the end of week 6, the researcher made clear that participants could continue working on their project goals as long as they liked or until the project goal was completed.

At the conclusion of the 6-week, virtual AI.d process, participants were sent an email inviting them to participate in the online post-survey conducted through Qualtrics. The post AI.d survey required 25 minutes for completion and was open for a two-week period. An email was sent to all participants halfway through to remind those who wished to complete the survey to do so. At the end of the two-week period the post-survey was closed, participants were thanked for their time, and reminded they could request a copy of the completed thesis. A copy of the emails sent can be found in Appendix E.

## Data Analysis

Both quantitative and qualitative analyses were performed on the collected data. Paired t-scores were used to analyze pre and post results on the dependent variables of virtual interaction, collaboration and relationship taken before and after the virtual AI.d process. The analysis determined whether the virtual AI.d process improved virtual interaction, collaboration, and relationship among participants. Data from the post-survey was analyzed to determine if efficacy and skill development occurred as a result of the virtual AI.d process.

A qualitative analysis was conducted on the evolutionary process from vision, to prototype, to result through the use of photographs and recorded actions during the delivery and valuation phases to look for the presence of elaboration. That is, did participants fulfill articulated visions through the execution of tangible or virtual prototypes?

Lastly, a secondary qualitative analysis was performed on the creative radical ideas posted during the virtual AI.d process and in-person design summit brainstorm sessions. Two sets of brainstorms will be compared in terms of idea fluency and flexibility. Does the virtual AI.d process increase idea flexibility and fluency over time? Number of participants will be controlled for by comparing the average number of ideas (fluency) and idea catagories (flexibility) overall. A second rater will check the categories to increase reliability.

## Summary

This chapter outlined the methods used in this research project, including the research design, sampling methodology and participants, instrument development, virtual

AI.d process protocol, data collection and data analysis procedures were discussed. The next chapter reports on the analysis results.

# Chapter 4

## Results

This chapter summarizes the quantitative and qualitative data from this pilot study. Three quantitative variables, virtual interaction, collaboration, and relational closeness, were measured before and after the 6-week, virtual AI.d process to determine any significant differences in pre and post scores. Two other quantitative variables, goal efficacy and skill building, were measured at the completion of the 6-week process to determine what effects the virtual AI.d process might have had as a result. The last variable, innovation, was measured both qualitatively and quantitatively during the design, deliver, and valuation phases of the virtual AI.d process. The chapter opens with the descriptive statistics and analysis of the quantitative variables and then details the qualitative results.

### Quantitative Results

This section describes the results of the quantitative variables measured over time in the pre and post-survey, including findings from the paired-sample t-test.

Descriptive statistics for variables measured over time, virtual interaction, collaboration, and relationship, are shown in Table 5. Collaboration was divided into subscales described as *charter alignment, communication, resource usage*, and *collaboration effectiveness* and were measured on the pre-survey. Also measured on the pre-survey, relationship was divided further into two subscales labeled *creating relationship* and *relationship interaction*. A six-point Likert scale from strongly disagree to strongly agree, plus not applicable was used to measure these variables.

**Table 5**

***Pre-Survey Descriptive Statistics***

| | N | Min | Max | Mean | SD |
|---|---|---|---|---|---|
| Virtual Interaction | 33 | 1.00 | 5.00 | 1.132 | 0.708 |
| Charter Alignment | 31 | 2.33 | 6.00 | 4.172 | 0.907 |
| Communication | 28 | 2.00 | 6.00 | 4.125 | 1.004 |
| Resource Usage | 28 | 1.33 | 5.75 | 3.885 | 1.415 |
| Collaboration Effectiveness | 28 | 2.00 | 6.00 | 4.277 | 0.832 |
| Creating Relationship | 30 | 1.00 | 6.00 | 3.744 | 1.231 |
| Relationship Interaction | 30 | 1.50 | 6.00 | 3.539 | 1.314 |
| Valid N | 14 | | | | |

In Table 6, descriptive statistics from the post-survey are depicted, repeating the seven measures from the pre-survey depicted as *virtual interaction*$_2$*, charter alignment*$_2$*, communication*$_2$*, resource usage*$_2$*, collaboration effectiveness*$_2$*, creating relationship*$_2$*,* and *relationship interaction*$_2$*,* in addition to four measurements from the post-survey. *Empathy* and *relationship building* were added to the post-survey as two additional subscales to measure relationship. The last two variables measured on the post-survey include *goal efficacy* and *skill building*.

**Table 6**

***Post-Survey Descriptive Statistics***

| | N | Min | Max | Mean | SD |
|---|---|---|---|---|---|
| Virtual Interaction$_2$ | 23 | 1.00 | 4.50 | 1.761 | 0.9432 |
| Charter Alignment$_2$ | 20 | 3.00 | 6.00 | 4.833 | 0.8482 |
| Communication$_2$ | 20 | 3.00 | 6.00 | 5.183 | 0.5240 |
| Resource Usage$_2$ | 20 | 3.00 | 6.00 | 4.533 | 0.7227 |
| Collaboration Effectiveness$_2$ | 20 | 1.00 | 5.67 | 4.520 | 0.7298 |
| Creating Relationship$_2$ | 20 | 1.33 | 6.00 | 3.867 | 1.0452 |
| Relationship Interaction$_2$ | 20 | 4.00 | 6.00 | 3.883 | 1.2201 |
| Empathy | 20 | 4.00 | 6.00 | 5.325 | 0.5654 |
| Building Relationship | 20 | 3.33 | 5.67 | 4.825 | 0.6248 |
| Goal Efficacy | 20 | 2.00 | 6.00 | 3.941 | 1.3854 |
| Skill Building | 20 | 2.00 | 4.00 | 3.483 | 0.6340 |
| Valid N | 15 | | | | |

Cronbach's alpha coefficients were used to calculate reliability for scales seen in Table 7. Paired sample t-test results for each of the seven pre and post-survey measures are reported in Table 8.

**Table 7**

***Scale Reliability***

| Scale | Cronbach's Alpha | N |
|---|---|---|
| Virtual Interaction | .786* | 2 |
| Charter Alignment | .571 | 3 |
| Communication | .526 | 3 |
| Resource Usage | .871* | 6 |
| Collaboration Effectiveness | .857* | 4 |
| Creating Relationship | .770* | 3 |
| Relationship Interaction | .844* | 3 |
| Empathy | .870* | 4 |
| Building Relationship | .860* | 6 |
| Goal Efficacy | .578 | 5 |
| Skill Building | .833* | 6 |

*indicated statistical significance

**Virtual interaction**. Virtual interaction is a two-question scale that reports the frequency of posts made by participants to other SRF young adults on Facebook personal profiles and SRF young adult Facebook groups. A Cronbach's alpha revealed the virtual interaction scale to be reliable ($\alpha$ =.79). Participants' post-survey responses ($M$ = 1.76, $SD$ = .71) reported significantly higher levels of virtual interaction after the 6-week, virtual AI.d process than pre-survey responses ($M$ = 1.13, $SD$ = .94), $t(19) = -3.37$, $\underline{p} < .003$.

**Collaboration**. Collaboration was measured using a six-point Likert scale for 19 items, divided into four subscales on both the pre and post-survey.

***Charter alignment***. The charter alignment subscale, consisting of 3 items ($\alpha$ =.57), was not found to be reliable. Post-survey measures (M = 4.17, SD = .91) for

**Table 8**

***Paired Samples Test***

| | | Paired Differences | | | | | t | df | Sig. (2-tailed) |
|---|---|---|---|---|---|---|---|---|---|
| | | Mean | SD | Std. Error Mean | 95% Confidence Interval of the Difference Lower | Upper | | | |
| Pair 1 | Virtual Interaction & Virtual Interaction$_2$ | -.52500 | .69727 | .15591 | -.85133 | -.19867 | -3.367 | 19 | .003* |
| Pair 2 | Charter Alignment & Charter Alignment$_2$ | -.83333 | 1.02017 | .25504 | -1.37694 | -.28972 | -3.267 | 15 | .005* |
| Pair 3 | Communication & Communication$_2$ | -.63333 | .87786 | .22666 | -1.11947 | -.14719 | -2.794 | 14 | .014* |
| Pair 4 | Resource Usage & Resource Usage$_2$ | -.90952 | 1.29527 | .34618 | -1.65739 | -.16166 | -2.627 | 13 | .021* |
| Pair 5 | Collaborative Effectiveness & Collaborative Effectiveness$_2$ | -.33333 | .98501 | .25433 | -.87881 | .21215 | -1.311 | 14 | .211 |
| Pair 6 | Creating Relationship & Creating Relationship$_2$ | -.22917 | 1.02356 | .25589 | -.77459 | .31625 | -.896 | 15 | .385 |
| Pair 7 | Relationship Interaction & Relationship Interaction$_2$ | -.29167 | .78998 | .19750 | -.71262 | .12929 | -1.477 | 15 | .160 |

*indicated statistical significance

charter alignment were significantly higher than pre-survey measures (M = 4.83, SD = .85), t(15) = -3.27, $\underline{p} < .005$.

***Communication***. The 3-item communication subscale reliability was low ($\alpha$ = .53). Post-survey test scores (M = 5.18, SD = .52) revealed significantly higher levels of communication than pre-survey test scores (M = 4.13, SD = 1.00), t(14) = - 2.79, $\underline{p} <$ .014.

***Resource usage***. The resource usage subscale was found highly reliable (six items, $\alpha$ = .87). Post-survey scores (M = 4.53, SD = .72) as compared to pre-survey scores (M = 3.89, SD = 1.42) indicated significant increase in resource usage, t(13) = 2.63, $\underline{p} < .02$.

***Collaboration effectiveness***. A Cronbach's alpha score of .86 indicated high reliability for the 4-item collaboration effectiveness subscale. Participants' pre-survey scores (M = 4.28, SD = .83) and post-survey scores (M = 4.52, SD = .73) showed no significant difference in collaboration effectiveness, t(14) = 1.31, p = n.s.

**Relationship**. Relationship was sub-divided into four subscales measured using a six-point Likert scale. Two were measured on both the pre and post-survey and the other two were only measured on the post-survey.

***Creating relationship***. A 3-item subscale measured the capacity for SRF young adults to create relationship and was shown to be reliable ($\alpha$ = 0.77). Differences in participants' scores on the pre (M = 3.74, SD = 1.23) and post-survey (M = 3.87, SD = 1.05) were not shown to be significant, t(15) = -0.90, p = n.s.

***Relationship interaction***. The relationship interaction subscale was found highly reliable (3 items, $\alpha$ = .84), however no significant difference was found between

participant pre (M = 3.54, SD = 1.31) and post-survey scores (M = 3.88, SD = 1.22), t(15) = -1.48, p = n.s.

***Empathy***. Empathy was an additional subscale of relationship measured after the 6-week virtual AI.d process and appeared only on the post-survey. Empathy was measured using a 4-item scale:

1. I felt like I could step into another member's shoes and experience their story as it was being told.
2. I was aware of my emotional reactions while hearing another member's personal story.
3. When I asked another member questions about their story, values and strengths, I noticed their emotional reactions and perspectives.
4. Discovering others' stories, values, strengths, and wishes helped to me to consider a new perspective.

A Cronbach's alpha found that the empathy subscale was reliable ($\alpha$ = .87). Mean scores for each item are displayed in Table 9 for empathy (M = 5.33, SD = .57).

**Table 9**

***Empathy Descriptive Statistics***

| Item | N | Min. | Max. | Mean | SD | Variance |
|---|---|---|---|---|---|---|
| 1 | 20 | 4 | 6 | 5.25 | .910 | .829 |
| 2 | 20 | 4 | 6 | 5.30 | .733 | .537 |
| 3 | 20 | 4 | 6 | 5.35 | .813 | .661 |
| 4 | 20 | 4 | 6 | 5.40 | .681 | .463 |

***Building relationship***. A six-item scale was developed to measure relationship building and data was collected on the post-survey. The questions asked of participants are as follows:

1. Hearing other members' stories touched me on a personal level.
2. I felt closer to other members after hearing their stories.

3. The questions I asked were powerful and helped the other members and I get to know each other at a deeper level.
4. Understanding others' view points and personal stories strengthened new and existing relationships with other members.
5. I enjoyed hearing other members' stories, values, and strengths.
6. Overall, I feel more connected to members of the SRF global young adult community than before.

The relationship building scale was found to be reliable ($\alpha = .86$). The total subscale means for relationship building is 4.83 and the mean for each score on the post-survey is shown in Table 10.

**Table 10**

***Relationship Building Descriptive Statistics***

| Item | N | Min. | Max. | Mean | SD | Variance |
|---|---|---|---|---|---|---|
| 1 | 20 | 4 | 6 | 5.60 | .598 | .358 |
| 2 | 20 | 4 | 6 | 5.65 | .587 | .345 |
| 3 | 20 | 4 | 6 | 5.35 | .813 | .661 |
| 4 | 19 | 4 | 6 | 5.21 | .713 | .509 |
| 5 | 20 | 5 | 6 | 5.75 | .444 | .197 |
| 6 | 20 | 3 | 6 | 5.35 | .745 | .555 |

**Goal efficacy**. Goal efficacy consisted of five items on the post-survey which were measured on a six-point Likert scale after the 6-week, virtual AI.d process. The items were as follows:

1. I was able to identify clear, actionable, and achievable steps to implement my prototype.
2. I took action on my identified steps by the time I specified.
3. Overall, I am satisfied with my progress and contribution to the SRF global young adult community.

4. Overall, I am satisfied with the progress and contribution of other members of the SRF global young adult community.

5. I feel that the virtual process has been effective in creating positive and sustainable results.

A Cronbach's alpha did not find the goal efficacy scale to be reliable ($\alpha$ = .58). The scale means is 3.94 and the descriptive statistics for each question item (see Table 11).

**Table 11**

***Goal Efficacy Descriptive Statistics***

| Item | N | Min. | Max. | Mean | SD | Variance |
|---|---|---|---|---|---|---|
| 1 | 18 | 2 | 6 | 3.45 | 1.508 | 2.273 |
| 2 | 18 | 2 | 6 | 3.40 | 1.578 | 2.489 |
| 3 | 20 | 1 | 6 | 3.56 | 1.854 | 3.438 |
| 4 | 19 | 2 | 6 | 4.62 | 1.147 | 1.317 |
| 5 | 20 | 3 | 6 | 4.67 | 0.840 | 0.706 |

**Skill building**. Skill building consisted of a four-item scale as follows:

1. Collaboration skills to bring people together and interact under a common goal.

2. Build closer relationships with others.

3. Innovation and creativity skills to recognize opportunities and design for them.

4. Creating goals and planning actionable steps to implement prototypes.

A 4-point Likert scale from *not at all* to *significantly*, including *not sure* was used to measure skill building for each of the four items. The scale was found to be reliable ($\alpha$ = .83). The mean for all items on the skill building scale is 3.48 (see Table 12).

**Table 12**

***Skill Building Descriptive Statistics***

| Item | N | Min. | Max. | Mean | SD | Variance |
|---|---|---|---|---|---|---|
| 1 | 20 | 2 | 4 | 3.38 | 0.62 | 0.38 |
| 2 | 20 | 3 | 4 | 3.58 | 0.51 | 0.26 |
| 3 | 20 | 2 | 4 | 3.38 | 0.72 | 0.52 |
| 4 | 20 | 1 | 4 | 3.31 | 0.95 | 0.90 |

Four participants indicated in items 1, 3, and 4 that they were not sure if the virtual AI.d process had any effect on skill building. One participant was unsure if the virtual AI.d process had any effect on skill building in item 2.

**Innovation**. Innovation is quantitatively measured in terms of the amount of ideas generated or fluency and the number of various types of categories each idea fits into or frequency. One virtual brainstorm took place during the 6-week, virtual AI.d process and one took place in person during the design summit.

Eight participants generated 35 ideas from 11 visions during the virtual brainstorm on Facebook. The mean for idea frequency is 4.38 ideas per participant. Idea categories were coded by two raters to increase reliability and identified 13 categories for innovation frequency; a mean of 1.63 categories per participant. Idea categories and number of ideas for each category are shown in Table 13. The second rater suggested recoding one of the ideas under Young Adult Group Engagement to Traveling not shown in the table.

**Table 13**

***Virtual Innovation***

| Fluency | Flexibility |
|---|---|
| 3 | Communication |
| 6 | Young Adult Group Development |
| 1 | Young Adult Listings |
| 5 | Young Adult Group Engagement |
| 2 | Young Adult Group Exercises |
| 4 | Share Knowledge |
| 2 | Spiritual Young Adult Support |
| 2 | Spiritual/Life Mentorship |
| 5 | Synchronized Spiritual Activities |
| 1 | Traveling Young Adults |
| 2 | Health & Wellness |
| 2 | Spaces for Young Adults |

Seven participants generated 39 ideas from 9 visions during the in-person design summit. The mean for idea frequency is 5.57 ideas per participant, indicating an increase in idea generation from the first, virtual brainstorm. Independent raters identified nine categories for innovation frequency; a mean of 1.29 categories per participant. The second rater noted that two categories, Global Community Development and Young Adult Group Website overlapped with one another. Idea fluency and flexibility for the design summit brainstorm can be found in Table 14.

**Table 14**

***Design Summit Innovation***

| Fluency | Flexibility |
|---|---|
| 6 | Global Community Development |
| 5 | Leadership |
| 11 | Young Adult Group Website |
| 3 | Foster Self-Expression |
| 3 | Making Talent Visible |
| 4 | Event Activity Ideas |
| 1 | Innovation |
| 3 | Support for Young Adult Life Needs |
| 3 | Spiritual Support |

Six items on the post-survey were developed to measure efficacy of the design summit and are as follows:

1. The design summit helped me to expand on my creativity.
2. The design summit allowed me to support others to expand on their creativity.
3. There was a high level of creative collaboration between me and other participants.
4. The design summit helped us to refine our ideas and prototypes.
5. The design summit helped me to know how to implement (test) my prototype.
6. Overall, the design summit was very helpful to build innovation skills in a collaborative setting.

Table 15 shows the descriptive statistics for four of the eight attendees at the design summit.

**Table 15**

***Design Summit Descriptive Statistics***

| Item | N | Min. | Max. | Mean | SD | Variance |
|---|---|---|---|---|---|---|
| 1 | 4 | 5 | 6 | 5.25 | 0.50 | 0.25 |
| 2 | 4 | 4 | 6 | 5.00 | 0.82 | 0.67 |
| 3 | 4 | 4 | 6 | 5.00 | 0.82 | 0.67 |
| 4 | 4 | 5 | 6 | 5.50 | 0.58 | 0.33 |
| 5 | 4 | 4 | 5 | 4.50 | 0.58 | 0.33 |
| 6 | 4 | 4 | 6 | 5.00 | 0.82 | 0.67 |

## Qualitative Results

Elaboration is the execution of an idea into form (Kim et al., 2009) and prototyping is the first stage of elaboration. The 6-week process developed 2 virtual prototypes on Facebook and one physical prototype from the design summit. The physical prototype was centered around making contact with newly entering young adults to help them find connection with the spiritual community and various events and resources available to them. The group of seven participants and the researcher used role play as a means to chart out how best to find and connect with incoming young adults. Several ideas were surfaced through generative dialogue, such as creating informational brochures, using a welcoming committee, making a calendar, and distributing information globally through the use of social media websites. Although the design summit adjourned with ideas about how to test the prototype, further implementation of these ideas was not executed into tangible results.

Another participant created a virtual prototype that built on the physical prototype created at the design summit. This virtual prototype displayed a map of channels SRF young adults take to find their way into the young adult community. Through temple

services, direct meeting of other spiritual devotees, special events such as a retreat, or on the World Wide Web, this prototype was created with the intention of discovering new ways to make connection with newly entering SRF young adult devotees. The creator of this prototype recently created a Google website to organize a young adult retreat which was then advertised globally using social media as a platform. Currently, SRF young adults are signing up for the retreat and further evidence of this prototype elaboration could be assessed given more time before the completion of this thesis.

The purpose of the second virtual prototype was to find ways that SRF young adults could initiate new ideas and projects by taking on an informal leadership role. The prototype tells a story of how a spiritual young adult might initiate, spread the word, and have support in a project. For example, a spiritual young adult has an idea to create a special interest group such as a spiritual community garden. This young adult would then seek support from a formal leadership committee and have access to the virtual AI.d process as a tool to develop the project. As the project grows, new ideas emerge thus spinning off new groups and building the global community.

As ideas and questions evolved the prototype into new iterations, the design team came up with a title called *community connector* as a replacement for *leader*, because community members could identify with being a connector but not necessarily a leader. The virtual group voted for the best title and community connector was the winning pick. A community connector was defined as (a) a bridge between the individual and the community, (b) one who creates and develops connections to others within and outside the global spiritual community, (c) a role that offers support, facilitates events, and listens to the needs of others, and (d) is an attractor of diverse friends, experiences, and embraces many interests. Most importantly, community connectors can be anyone and do

not have to already serve as a formal leader for a committee or attain a particular level of membership. A community connector can also evolve into a more specified role within the global young adult community. If, for example, a community connector identified with being very adept at creating retreats, that person may adopt a new formal title such as Retreat Master and serve the young adult community in that capacity. Although a formal committee of community connectors to support one another has yet to be assembled, the title has stuck and identified community connectors are finding new titles under which to serve their community as seen on the YA One World website.

Two other ideas borne out of the brainstorm sessions were not prototyped, yet were executed and demonstrate another form of innovation elaboration. One idea recently executed by one of the local temple groups was the notion of using a closed group. A closed group on Facebook refers to a format where members must be first approved by a group moderator before joining and non-members cannot view group posts. A closed (and secret) group was used to conduct this research and participants remarked that they liked the idea because it created a safe space to share, thereby, fostering increased trust and group intimacy. The second idea was to have a synchronized meditation for global young adult and was recently initiated as a group event through Facebook where anyone could join.

**Summary**

This chapter presented results on both quantitative and qualitative variables. Notable quantitative findings of this study were an increase in virtual interaction and in the collaboration subscale, resource usage. Qualitative evidence of idea elaboration from idea to realized result also suggests that innovation did occur during the 6-week, virtual AI.d process. No significant differences in pre- and post-survey scores for relational

closeness were found. Research findings, conclusions, study limitations, and suggestions for future research are further discussed in the next chapter.

# Chapter 5

## Conclusions

The purpose of this research was to investigate a new process called AI.d which synthesized AI with design thinking. Variables measured in this research included virtual interaction, collaboration, relational closeness, innovation, goal efficacy, and skill building. Chapter five summarizes and discusses each of these findings and interprets the implications of the results. Lastly, recommendations for future research and study limitations are examined.

### Discussion

Since the dawn of Internet, an increasing interest in working virtually has appeared on the scene for organizations and communities. Rather than subscribe to the limitations of physical time and space, virtual communities and organizations are learning to take advantage of cost efficiency, global knowledge and resource sharing, 24-hour work periods through parallel participation, and a well-documented electronic archive of transactions (Berry, 2011). This research with a global community takes one more step in building a foundation of understanding of what conditions foster collaborative success when working in virtual mode. AI.d was created to bridge the gap from expert-designer to user-as-designer while unleashing an appreciative approach to innovation and change.

**Does the virtual AI.d process facilitate effective collaboration?** This question explores various facets of collaboration divided into four subscales: charter alignment, communication, resource usage, and collaboration effectiveness.

The virtual AI.d process did increase collaboration as evidenced by increased resource usage. There was significant difference in resource usage ($\alpha$ = .87, 6) pre (*M* = 4.53, *SD* = .72) and resource usage post scores (*M* = 3.89, *SD* = 1.42); *t*(13) = (2.63), p =

.02. This suggests that the virtual AI.d process most influenced the use of community resources and knowledge. Subscale items inquired into the extent that participants felt that their and others' interests, skills, and knowledge were identified and made a recognizable difference. The nature of ideas surfaced during generative phases reflects the personal interests of participants and brings awareness to the skills and knowledge of community members. Members' conversations were forthcoming with information sharing while building on each others' ideas in the design phase.

A cornerstone of virtual collaboration is the exchange of information, meaning, and understanding (Berry, 2011) that cultivates a sense of community (Kauppila et al., 2011). The qualitative and quantitative data suggest that the virtual AI.d process created an effective container wherein exchanges could nurture community collaboration to take place.

Although the subscale for communication did not prove reliable, there is evidence that the virtual AI.d process facilitated communication of needs and offers of support. Overall mean scores increased from pre ($M$ = 4.13, $SD$ = 1.00) to post ($M$ = 5.18, $SD$ = .52) suggesting that the virtual AI.d process had some affect on how community members communicated.

One of the three items on the communication subscale confirms that members felt an increased presence of open communication. A qualitative observation to support this notion took place during the discovery phase when one of the members expressed dissent and requested that others acknowledge feelings expressed about being a part of the community. Exchanges made by others in the group acknowledged this member's point of view and expressed similar feelings about particular aspects of the Global SRF Young Adult community. Trust through dialogue is essential to the building of a virtual

community in order for it to form deeper relationships required for higher performance outputs (Peppler & Solomou, 2011; Moffat & McLean, 2009).

Charter alignment, though also not found to be a reliable subscale ($\alpha$ = .57, 3), revealed evidence that the AI.d process opened an opportunity for members to take part in the formulation of the community mission and vision. The literature points out that community members must have a hand in the design of a charter before being committed to its execution (Moffat & McLean, 2009; Waters, 2007). During the dream phase participants dialogued about each other's visions and surfaced salient themes expressing a clear mission of the community. A community poll revealed the top voted themes which express the community's mission. Those themes were the importance of cultivating a spiritual family, unconditional love and acceptance of all, evoking and reinforcing the SRF principles and practices, and allowing the guru Paramahansa Yogananda's guiding hand to work through the SRF young adults. Members' discussion of their respective visions may have provided some clarity around and alignment with community purpose. It would suggest that the virtual AI.d process supported these interactions.

The virtual AI.d process did not reveal significant differences on collaboration effectiveness ($\alpha$ = .86, 4) pre (*M* = 4.28, *SD* = .83) and post (*M* = 4.52, *SD* = .73) scores. Despite this finding, some evidence suggests that the AI.d process had moderate influence. Participants reported a 0.66 increase from pre and post-survey mean scores on item 2 which rates the level of collaboration effectiveness when taking action on goals. A possible explanation for these results is the notion that communities must first establish social relationships in order to become cohesive enough to effectively implement solutions (Berry, 2011; Moffat & McLean, 2009). This variable is explored next.

**Does the virtual AI.d process foster relational closeness?** Two scales of relationship, creating relationship ($\alpha$ = .77, 3) and relationship interaction ($\alpha$ = .84, 3), were measured before and after the 6-week, virtual AI.d process. Creating relationship is the capacity for others to meet and make lasting relationships with other members. Relationship interaction is the level of interaction members have with each other online and offline during and outside of formal events. No significant difference in pre and post measures for either variable was found.

Two additional scales of relationship, empathy ($\alpha$ = .87, 4) and relationship building ($\alpha$ = .86, 6), were created and measured after the 6-week, virtual AI.d process completed. Mean scores for empathy ($M$ = 5.33, $SD$ = .57), defined as capacity of awareness of self and others (Gerdes et al., 2010) and relationship building ($M$ = 4.83, $SD$ = .62), the facilitation of meeting and getting to know others, revealed that participants agreed both were present during the virtual AI.d process.

The degree of relational strength and trust determines the depth of conversations and cohesion (Karpova et al., 2009) that allow virtual communities to share, tacit or explicit knowledge (Kauppila et al., 2011), learn (Kirschner & Van Bruggen, 2004), and innovate (Peppler & Solomou, 2011). The research suggests that the interaction which took place during the virtual AI.d process may have helped to create the conditions for relational closeness as measured by increased mean scores on all four subscales and the nature of interactions found in the qualitative data. Such open and honest sharing of doubts and support described previously evidence that relationship was in its forming stages. Furthermore, participants reported that the area of skill they increased in the most was relationship building which is discussed later in this work.

**Does the virtual AI.d process facilitate innovation?** This question is answered both qualitatively by measuring idea elaboration and quantitatively by comparing fluency and flexibility increase in successive brainstorms. Clearly, some ideas were compelling enough to execute while others are still in the process of emerging into tangible form. Ideas that found their full expression of elaboration included the use of the closed group format on Facebook recently instituted for the Encinitas Young Adults temple group. A planned synchronized meditation was announced shortly after the conclusion of the 6-week process in an event invite to other SRF young adults on Facebook. The evolution of identifying and encouraging community connectors to identify themselves and initiate their ideas is an ongoing continuation. Recently, special interest groups such as a local women's mediation group and a creativity group night have emerged. The most noteworthy example of a community connector is one participant who independently initiated and organized a camping retreat open to SRF young adults all over the world. An announcement was sent to a network of hundreds of SRF young adults encouraging attendance from any temple, center, region, state, and country with 50 spots available to reserve. Currently, young adults signed up come from seven cities in California, 1 from out of state, and 1 from another country. A Google site was created especially for the event and several community connectors are signing up to lead various parts of the retreat. It is a co-created effort initiated by one young adult who participated in the 6-week AI.d process.

Quantitatively, idea fluency increased from an average of 4.38 ideas per person during the virtual brainstorm to an average of 5.57 ideas per person during the in-person design summit. The community demonstrated idea flexibility by generating a total of 74 ideas across 21 idea categories during the 6 weeks of the virtual AI.d process. Mean

scores for those that attended the 2-hour design summit suggest that it was effective at helping to expand on their creativity (*M* = 5.25), support others' creativity (*M* = 5.00), creatively collaborate (*M* = 5.00), refine ideas and prototypes (*M* = 5.50), prepare to test prototypes (*M* = 4.50), and build overall innovation skill (*M* = 5.00).

The user-as-designer idea postulates that any person can be a designer presumably because the design thinking process is learnable and not reserved for just the experts (Jana, 2006), although Brown and Katz (2009) express doubt about the Everyman-Designer becoming a reality. The findings show that it is quite possible for communities to generate their own ideas and identify their own solutions. However, the extent to which solutions are implemented depends not so much on designer skill as it does on the depth of member relationship.

**Additional Findings**

Although not the central focus of the study, other variables were measured to gather additional information about the virtual AI.d process.

**Does the virtual AI.d process increase virtual interaction among community members?** A significant finding implies that the virtual AI.d process influenced virtual interaction in the form of Facebook posts to other members and groups online. Data for virtual interaction ($\alpha$ = .79, 2) as measured by the number of online posts, was taken both before (*M* = 1.13, *SD* = .94) and after (*M* = 1.76, *SD* = .71) the 6-week process. A significant paired sample t-score, *t*(19) = (-3.37), p = .003, revealed that the virtual AI.d process increased participants' level of virtual interaction.

**Does the virtual AI.d process effectively facilitate the execution of goals articulated by participants?** The virtual AI.d process did not support the realization of goals from vision to completed action. Executing actions to attain goals was not

uniformly present in the community. Goal efficacy ($\alpha$ = .58, 5) was not found to be a reliable scale and had a moderate mean score ($M$ = 3.94, $SD$ = 1.39). Participants disagreed that the virtual AI.d process supported them to identify actionable goals but that it did create some sustainable results as evidenced by higher mean scores on scale items 4 and 5.

**Does the virtual AI.d increase skill development?** Skill building was influenced by the virtual AI.d process. Mean scores using a 4-point Likert scale suggest that participants found the virtual AI.d process to considerably increase their skill in areas of collaboration ($M$ = 3.38), innovation ($M$ = 3.38), goal creation ($M$ = 3.31), and most notably, relationship building ($M$ = 3.58). Experiential learning during the 6-week, virtual AI.d process, including the personal exercises, supported participants' skill development.

## Study Limitations

The restricted sample size and particular age group (18 to 39) for this study limits the ability to generalize findings to other organizations and communities. The SRF global young adult group is also an informal community whose needs and interests may differ from other types of communities and formal organizations.

The success of the virtual AI.d process may have been limited by three other factors. First, it began without any formal training in design thinking and AI concepts which could impact each phase of the process from proper interviewing technique to iterating prototyped ideas.

Second, the virtual AI.d process began virtually without any in-person meeting until the end of the third week where only a few participants were able to attend the design summit. Pervading literature also notes that virtual collaboration should start off with an in-person meeting so that members can more quickly establish relationships with

one another (Berry, 2011; Karpova et al., 2009). As discussed earlier, the depth of relationship significantly impacts community learning (Garber, 2004; Kirschner & Van Bruggen, 2004), knowledge sharing (Kauppila et al., 2011), generative capacity (Peppler & Solomou, 2011), and collaborative capacity (Karpova et al., 2009) necessary for transformation.

Third, participants expressed to the principle researcher that the 6-week process moved too quickly. Initially, the virtual AI.d process was designed to take place over ten weeks though because the study had a limited period of time within to be conducted, the process was shortened by four weeks. There was little time for participants to move through each phase and, in particular, the first phase of discovery needed to be at least two weeks to allow sufficient time to build relationships.

**Implications for Organizational Development Practitioners**

Organizations may consider applying social media as a platform to support virtual interaction among globally dispersed teams. These virtual spaces can help organizations to make efficient use of resources. The virtual AI.d process could be used both for virtual team or project development and as a large-scale change tool that could accompany open space methods or put a new spin on AI. The virtual AI.d process may also appeal to the increasing interest in design thinking to foster innovative capacity in individuals, teams, organizations, or whole communities.

Organization development practitioners should be aware of the need to customize the focus of the inquiry as consistent with the AI process. Preparation should include a basic overview of the AI and design thinking, including techniques in interviewing and brainstorming. Sufficient time is needed execute each phase and an additional project planning tool for the implementation process would be helpful in facilitating goal

efficacy. As suggested by Garber (2004), virtual spaces should be designed with intention to create the appropriate container for desired virtual interactions.

**Recommendations for Future Research**

As part of the growing body of research on virtual collaboration and innovation, AI.d presents future opportunities to refine the user-as-designer concept and build collaborative capacity by focusing on the cultivation of relationship in other ways. One recommendation is to begin the AI.d process with an opening summit where participants would meet for the first time in person to cultivate relationship as well as undergo training in basic AI and design thinking principles and practices. The opening summit could be accomplished in one day and could potentially increase the effectiveness of collaboration and relational closeness.

Another area of difficulty arose during the deliver phase where participants were instructed to discuss actionable steps to test their prototypes. A steering committee formed by self-selected and community voted members could be useful to help plan and implement projects. In this research, several design teams formed around initiatives that appealed to them and some participants belonged to more than one team. Further research might focus implementation efforts by limiting membership to only one design team while those who take membership of a steering committee solely direct and actively support the efforts of each design team.

A final suggestion for future research is to apply the virtual AI.d process in a more formal setting within a diverse pool of participants. The current study lacks generalization of results because it spotlighted the efforts of a spiritual young adult community where participants' ages ranged from 20 to 39. A different setting and range

of diversity could reveal deeper insight into the collaborative, relational, and innovative capacity of the virtual AI.d process.

**Conclusion**

This is the dawn of an information age, globally connected with the help of technology and teeming with possibilities for collaboration and innovation. Forerunners David Cooperrider of the AI philosophy and David Kelley of the design thinking philosophy share a commonality in that these processes were meant to be shared to create a healthy and sustainable world. This research has piloted the first test of a newly created process developed by taking the best of both and sewing them together into AI.d.

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## Appendix A: Waiver of Informed Consent Form

INTRODUCTION:
This research study is being conducted by Colleen N. Holt, a student in the Master of Science in Organization Development program at Pepperdine University, Graziadio School of Business and Management, under the direction of Dr. Terri D. Egan.

PURPOSE:
The purpose of this research is to investigate the effectiveness of a method called 'AI.d' in a virtual community to determine its ability to enable members to effectively collaborate and innovate by leveraging a community's strengths. As the world's increasing complexity of change and globalization increase, novel challenges need to be solved by engaging as many stakeholders as possible using all means of communication including virtual platforms. There is a need to more fully understand the virtual conditions which allow members to assemble into an effective collaboration, generate innovative ideas, and implement them in an ever changing environment. As a member of the Global Young Adults Self-Realization Fellowship community, you are invited to participate in this study.

* Please note that the non-profit organization, Self-Realization Fellowship, is not affiliated with this study.

PROCEDURES:
My participation will include two online surveys, 6 weeks of virtual AI.d participation and an optional design summit. If the design summit is cancelled due to non-participation, random selection of participants will be employed to conduct a 15-minute interview.

PRE-SURVEY -- The first online survey will ask me questions about me and my participation in the Self-Realization Fellowship Global Young Adult community and will take no more than 15 minutes to complete. I do not have to answer any of the questions on the survey that I prefer not to answer—simply leaving such items blank.

VIRTUAL AI.D PROCESS -- My participation in the virtual AI.d process will require 1.5 hours a week for a total of 6 weeks and will be held on a secret group on Facebook. During the process, I will be asked to:

Interview and be interviewed by another participant about the best, most meaningful experiences with the SRF Global Young Adult community,
Collectively create a vision of what I and others would like to see more of in our community,
Collectively brainstorm and prototype ideas,
Decide upon individual actions I am willing to take to implement those ideas,
Take action on the steps I have designed,
Report my progress and learning as a result of taking my identified steps

OPTIONAL DESIGN SUMMIT -- During the third week, I will be invited to attend an optional 2 hour design summit to be held at a Self-Realization Fellowship temple in southern California. Drawings of visions and prototypes that I and others create during the design summit will be photographed and documented for research purposes with my permission.

POST-SURVEY -- After the end of the 6 weeks, at the completion of the virtual AI.d process, I will be sent an online follow-up survey which will ask me questions about participation, collaboration, relationship building, effectiveness, use the virtual AI.d process, and skill building. This survey will take no more than 25 minutes to complete. I do not have to answer any of the questions on the survey that I prefer not to answer—simply leaving such items blank.

BENEFITS:
The research involves direct benefit to the Self-Realization Fellowship global young adult community in that it has the potential to enhance interpersonal relationships, identify strengths, and articulate and carry out a vision for positive change. The completion of surveys will report valuable information about the effectiveness of the virtual AI.d process collaboration and its ability to create innovative, strengths-based change. As a research participant, I may directly benefit by skill development in collaboration, relationship building, innovation, and goal effectiveness through the experience of the virtual AI.d process. I will be

able to use and share the virtual AI.d process in the future for my own and others' personal and professional development.

RISKS OR DISCOMFORTS:
I understand there are no major risks associated with this study.

PARTICIPATION:
I understand that participation is voluntary and I may refuse to participate and/or withdraw my consent and discontinue at any time without penalty or loss of benefits to which I am otherwise entitled. Terminating my participation at any time will not put my Self-Realization Fellowship global young adult membership in jeopardy in any way.

I can also request a summary of the study findings to be delivered in about one (1) year by sending an email to [contact information].

CONFIDENTIALITY:
I understand that all virtual interactions and postings to the Facebook group where this research is conducted are kept confidential through the use of a secret group. Secret groups on Facebook do not reveal my identity, are not found in search results, and all information posted therein is unviewable and unsearchable. I may delete any posts I make at any time and request the researcher to delete posts made by other participants without risk or penalty.

DESIGN SUMMIT -- I understand that photographs taken at the design summit will not be of me and other participants nor will they reveal information which could identify me or others. All photographs will exclude any personally identifying or sensitive information to respect my confidentiality. My objection to photographing may be made to the researcher in confidence and my request will be honored without risk or penalty. Photographs will be kept in a password protected electronic file.

I understand that the researcher, Colleen Holt, will take all reasonable measures to protect the confidentiality of my records and my identity will not be revealed in any publication that may result from this project. The confidentiality of my records will be maintained in accordance with applicable state and federal laws.

COMPENSATION:
I understand that there will be no compensation in exchange for participation in this research.

CONTACT:
I understand that the investigator is willing to answer any inquiries I may have concerning the research herein described and that I may contact the researcher, Colleen Holt at [contact information]. I understand that I may contact Dr. Terri D. Egan at [contact information] if I have other questions or concerns about this research.

If I have questions about my rights as a research participant, I can contact Dr. Yuying Tsong, Chairperson of the Institutional Review Board, Pepperdine University, at [contact information]. I may also contact the GPS IRB Manager, Jean Kang, at [contact information].

CONSENT:
I understand to my satisfaction the information regarding participation in the research project. All my questions have been answered to my satisfaction. I have received a copy of this informed consent form, which I have read and understand. By checking the box below, I hereby consent to participate in the research described above.

θ I have read the informed consent (above) and agree to participate in this study.

## Appendix B: Pre-Survey

**Question Set 1: Demographic Information**

1. **What is your age?**
   - Enter age

2. **What is your gender?**
   - Male
   - Female

3. **How long have you been a member of the SRF global young adult community?**
   - Less than 1 year
   - 1+ to 2 years
   - 2+ to 3 years
   - 3+ to 4 years
   - 4+ to 5 years
   - 5+ to 6 years
   - Over 6 years
   - Never participated

4. **What is the status of your membership in the Self-Realization Fellowship?**
   - Not a lessons student or Kriyaban
   - Lessons student (in the past or currently)
   - Kriyaban

5. **On average, I attend Self-Realization Fellowship Young Adult Group meetings and events in person:**
   - More than 24 times per year (more than twice a month)
   - 18—24 times per year (twice a month)
   - 17—10 times per year (once a month)
   - 5—9 times per year
   - 1—4 times per year
   - Never attended

6. **The Self-Realization Fellowship Young Adult Group I attend most often is:**
   - Please state _____
   - I do not attend

**Question Set 2: Prior Experience**

7. **My level of experience in design thinking is:**
   - Never used it
   - Used it once
   - Use it on occasion
   - Use it regularly

8. **My level of experience with change appreciative inquiry is:**
   - Never used it
   - Used it once
   - Use it on occasion
   - Use it regularly

**Question Set 3: Virtual Community Interaction**

9. **On average, I post _____ comment(s) or message(s) directly to other SRF young adults' online profiles a week:**
   - Less than 1

- 1—3
- 4—7
- 8—12
- 13—17
- 18—22
- 23—28
- More than 28

10. **On average, I post _____ comment(s) or message(s) on SRF young adult online groups a week:**
    - Less than 1
    - 1—3
    - 4—7
    - 8—12
    - 13—17
    - 18—22
    - 23—28
    - More than 28

**Question Set 4: Collaboration Level**

11. **Please rate the following: (7 point Likert from strongly disagree to strongly agree plus N/A)**
    - The vision, mission and goals of the SRF global young adults community are well defined and actionable
    - I have taken part in creating the vision and goals for the SRF young adults community/group
    - I am empowered to participate in supporting the vision and taking action on goals
    - I see the SRF young adult community as a place for me to find support and nurture my life goals and progress
    - There is a high level of personal initiative and commitment among members
    - Effective collaboration is present when taking action on goals
    - Open communication is present within our community
    - I feel that my knowledge, skills, and interests are identified and put to good use
    - I am motivated to take on a leadership role when my knowledge and skills can fulfill an identified objective or goal
    - I am aware of the needs of other community members and offer my support
    - My knowledge and skills have made a recognizable difference in the community
    - I am familiar with the knowledge, skills, and interests of other members
    - I feel that the knowledge, skill, and diversity of other members are put to good use
    - Members of the SRF global young adults community and I share helpful information and resources
    - Others outside the SRF global young adults community often lend support in some way
    - I feel there is a high level of creativity and resourcefulness present in collaborations
    - I feel enthusiastic and energized during collaborations
    - Results of collaborations are visible, acknowledged and celebrated
    - I am satisfied with the decisions, goal progress and outcomes from collaborations

**Question Set 5: Relationship to Others**

12. **Please rate the following: (7 point Likert from strongly disagree to strongly agree plus N/A)**
    - I know most of the members of the SRF global young adults community
    - I make a conscientious effort to get to know new members

- I interact frequently with the members of the SRF global young adults community during in person meetings and events
- I interact frequently with the members of the SRF global young adults community online
- I interact frequently with the members of the SRF global young adults community in person outside of meetings and events
- I have developed long-term, personal relationships with most of the members of the SRF global young adults community

## Appendix C: Post-Survey

**Question Set 1: Percentage of Participation**

1. **Please rate your level of participation in the virtual, 6 week AI.d process: 0% = None at all to 100% = Completely (Uses a sliding scale from 0 to 100 percent)**
   - Week 1: Interviewing and being interviewed by another
   - Week 2: Discovering and voting on themes from the interview stories
   - Week 2: Visualizing and sharing your future vision/ Possibility statement
   - Week 3: Brainstorming ("Yes and . . . ")
   - Week 4: Creating and commenting on prototypes
   - Week 5: Forming design teams and discussing possible actions
   - Week 6: Valuating your action, sharing your learning, refining your next step

**Question Set 2: Virtual Community Interaction**

2. **On average, I post _____ comment(s) or message(s) directly to other SRF young adults' online profiles a week:**
   - Less than 1
   - 1—3
   - 4—7
   - 8—12
   - 13—17
   - 18—22
   - 23—28
   - More than 28

3. **On average, I post _____ comment(s) or message(s) on SRF young adult online groups a week:**
   - Less than 1
   - 1—3
   - 4—7
   - 8—12
   - 13—17
   - 18—22
   - 23—28
   - More than 28

**Question Set 3: Collaboration**

4. **Please rate the following: (6 point Likert scale from strongly disagree to strongly agree plus N/A)**
   - The vision, mission and goals of the SRF global young adults community are well defined and actionable
   - I have taken part in creating the vision and goals for the SRF young adults community/group
   - I am empowered to participate in supporting the vision and taking action on goals
   - I see the SRF young adult community as a place for me to find support and nurture my life goals and progress
   - There is a high level of personal initiative and commitment among members
   - Effective collaboration is present when taking action on goals
   - Open communication is present within our community
   - I feel that my knowledge, skills, and interests are identified and put to good use
   - I am motivated to take on a leadership role when my knowledge and skills can fulfill an identified objective or goal
   - I am aware of the needs of other community members and offer my support

- My knowledge and skills have made a recognizable difference in the community
- I am familiar with the knowledge, skills, and interests of other members
- I feel that the knowledge, skill, and diversity of other members are put to good use
- Members of the SRF global young adults community and I share helpful information and resources
- Others outside the SRF global young adults community often lend support in some way
- I feel there is a high level of creativity and resourcefulness present in collaborations
- I feel enthusiastic and energized during collaborations
- Results of collaborations are visible, acknowledged and celebrated
- I am satisfied with the decisions, goal progress and outcomes from collaborations

**Question Set 4: Relationship**

5. **Please rate the following: (6 point Likert scale from strongly disagree to strongly agree plus N/A)**
   - I know most of the members of the SRF global young adults community
   - I make a conscientious effort to get to know new members
   - I interact frequently with the members of the SRF global young adults community during in person meetings and events
   - I interact frequently with the members of the SRF global young adults community online
   - I interact frequently with the members of the SRF global young adults community in person outside of meetings and events
   - I have developed long-term, personal relationships with most of the members of the SRF global young adults community
   - Hearing other members' stories touched me on a personal level
   - I felt closer to other members after hearing their stories
   - I felt like I could step into another member's shoes and experience their story as it was being told
   - I was aware of my emotional reactions while hearing another member's personal story
   - When I asked another member questions about their story, values and strengths, I noticed their emotional reactions and perspectives.
   - The questions I asked were powerful and helped the other members and I get to know each other at a deeper level
   - Discovering others' stories, values, strengths, and wishes helped to me to consider a new perspective
   - Understanding others' view points and personal stories strengthened new and existing relationships with other members
   - I enjoyed hearing other members' stories, values, and strengths
   - Overall, I feel more connected to members of the SRF global young adults community than before
   - I feel more motivated to participate in SRF global young adult community in person meetings and events
   - I am more active in the virtual (online) community of the SRF global young adults

**Question Set 5: Efficacy**

6. **I attended the design summit**
   - Yes
   - No

7. **If you answered yes, please rate the following: (6 point Likert scale from strongly disagree to strongly agree plus N/A)**
   - The design summit helped me to expand on my creativity
   - The design summit allowed me to support others to expand on their creativity
   - There was a high level of creative collaboration between me and other participants

- The design summit helped us to refine our ideas and prototypes
- The design summit helped me to know how to implement (test) my prototype
- Overall, the design summit was very helpful to build innovation skills in a collaborative setting

8. **Please rate the following: (6 point Likert scale from strongly disagree to strongly agree plus N/A)**
    - I was able to identify clear, actionable, and achievable steps to implement my prototype
    - I took action on my identified steps by the time I specified
    - Overall, I am satisfied with my progress and contribution to the SRF global young adults community
    - Overall, I am satisfied with the progress and contribution of other members of the SRF global young adults community
    - I feel that the virtual process has been effective in creating positive and sustainable results.

**Question Set 6: Process Usage**

9. **Please rate the following: (6 point Likert scale from strongly disagree to strongly agree plus N/A)**
    - I would participate in another virtual collaboration using this process
    - I would invite others to participate in a future virtual collaborations using this process
    - I would share this virtual process with other members of the SRF global young adults community who are not aware of it
    - I would share the virtual process with people outside the SRF global young adults community
    - I have ALREADY shared the virtual process with other members from the SRF global young adults community
    - I have ALREADY shared the virtual process with people outside the SRF global young adults community

10. **I am currently planning or involved in another virtual collaboration using part or all of this process**
    - Yes
    - No

11. **If you answered yes, please share with whom you are planning or sharing the virtual AI.d process:**
    - My Family
    - My Community
    - My Organization
    - Other (please state):_____
    - N/A

**Question Set 7: Skill Building**

12. **Please choose the answer that best describes you. (4 point Likert scale from not at all to significantly plus not sure)**

    **The virtual AI.d process has helped to me to develop:**
    - Collaboration skills to bring people together and interact under a common goal
    - Build closer relationships with others
    - Innovation & creativity skills to recognize opportunities and design for them
    - Creating goals and planning actionable steps to implement prototypes

# Appendix D: AI.d Process Protocol

**General Introduction:** AI.d is a process that brings people together to collaboratively discover the strengths they bring to a community, their vision for its future, and ways to innovatively co-create that future. This process combines appreciative inquiry (AI) and design thinking (d). Through the AI.d process, you will cultivate the designer and positive change catalyst in you.

**Appreciative inquiry** seeks to find the core life-giving qualities and values people bring to an organization or community in effort to create more of what they want. Through the telling of stories of times when people felt at their best and most engaged, they discover themes that were in place which allowed these extraordinary circumstances to occur. These themes are then used to co-create a thriving organization or community.

**Design thinking** is an innovative process of brainstorming, iterating, and prototyping ideas used by designers to invent new products and services as well as solve problems through radical collaboration. "All of us are smarter than any of us" is the basis of a design thinker's philosophy.

## Timeline:

| Time | Phase | Activity |
|---|---|---|
| **Prior to start Jan 2 - 8** | Pre-Survey | Complete 15 minute survey online |
| **Week 1 Jan 8 - 14** | Phase 1: Discover<br>Phase 2: Dream | Story telling/interviewing<br>Theme surfacing |
| **Week 2 Jan 15 - 21** | Phase 2: Dream | Future vision, possibility statements & reframe into design question |
| **Week 3 Jan 22 - 28** | Phase 3: Design | Brainstorm session and idea reflecting |
| **1 day Jan 28** | Phase 3: Design<br>2 Hr. Design Summit | (optional in person summit) Prototype and feedback session, reflect, & support |
| **Week 4 Jan 29— Feb 4** | Phase 3: Design | Design team formation, prototype session and initial design team feedback |
| **Week 5 Feb 5 - 11** | Phase 4: Deliver | Devising action to test prototype, reporting via calendar (Once done, can go immediately to phase 5) |
| **Week 6 Feb 11 - 18** | Phase 5: Valuate | Taking action, testing prototypes, reporting learning during the recycling through the phases |
| **Completion Feb 19 - 29** | Post-Survey | Complete 25 minute survey online |

**Objective Introduction:** The intention of the SRF Global Young Adults is to create spiritual connection in harmony with principles taught by Paramahansa Yogananda for those between the age of 18 and 39. Each local group has its own unique way of creating this connection though little interconnectedness exists between the groups. Through the

AI.d process, the Young Adults of SRF would be able to establish global connections to share ideas, support each other in life and spiritual goals, and forge a meaningful future for the community as a whole.

The process is designed to work on three levels: to support personal and professional growth at the individual level, growth and transformation at the local community level, and growth and transformation at a global level.

****Please Note:** This research initiative is not affiliated with the non-profit organization of Self-Realization Fellowship. It is sponsored by young adults for benefit of the SRF Global Young Adult community.

**What to Expect:** Instructions will be sent to you at the beginning of each week to guide you through the process. Most of the process will take place within our Facebook group.

**Optional Personal Reflections:** At the end of the instructions, you will see a "Personal Reflection" exercise. This is an **optional** personal development exercise you may choose to complete outside the group. The personal reflections will not be used as part of the 6 week group collaboration.

**Getting Started:** To get a head start in preparing for the first week, you will receive some instructions now. The process will **begin on January 8, 2012** and conclude on February 18, 2012. Please complete the survey and await additional instructions on January 8th before conducting interviews in the first phase. **You may select partner(s) and schedule your interview together now (see below instructions).** *It is advised that you try to schedule your interview during the first part of the week (January 8—12) so that you have enough time to complete the following steps.*

Contact me with any questions you may have at:
[contact information]

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## **PHASE ONE:** Discovery—"Treasure Hunt"

"Never do anything that taints your mind. Wrong actions cause negative or evil mental vibrations that are reflected in your whole appearance and personality. Engage in those actions and thoughts that nurture the good qualities you want to have."—Paramahansa Yogananda

The essence of the first phase is captured in the above quote by Yoganandaji. First, it deliberately seeks out the positive: what is appreciated, what is valued, what gives life—in this case, to the Global SRF Young Adults community. It is a process that brings out

that which we wish to nurture, to grow in ourselves in others. By meeting and interviewing a partner, you get to discover who they are and how they bring this community to life and they get to learn about you! We may not even realize the value we bring and this is why another set of eyes is so valuable in this first step.

This type of interview is different from traditional interviews because it looks for the most creative, exciting, life-giving experiences of life and the community while uncovering your values and what is most meaningful to you.

**Instructions for interviewing with partners:**

- Select a person in our Facebook group that **you do not know** particularly well, or that **you want to know better**. Do this by messaging group member(s) and then post who your interview partner(s) is to the group list (Link: https://www.facebook.com/groups/306779586021043/#!/groups/306779586021043/doc/313398252025843/).

- You will interview your partner for at least **30 minutes then switch roles** and your **partner will interview you**. (Total time: at least **1 hour**). Starting on **January 8, 2012** you will have one week (**until January 14, 2012**) to complete your interview and the first part of **Phase 2: Dream**.

- **There are multiple ways you can conduct your interview.** Pick the best fit for you and your partner(s). You may choose to use: Facebook video (https://www.facebook.com/videocalling/), Skype calling, instant messaging, a phone call, or if possible an in-person meeting to conduct the interview. Be sure to **remove distractions** during this time.

- **If you are doing an interview by video, phone, or in person:** During the interview, jot down words, phrases, quotes, anything that stands out for you as exciting and important as you listen. You may want to write down verbatim, a phrase that intrigues you or stands out. As the story is told, capture enough to help you recall the story so that you can **share it later** by **posting it on wall of the group Facebook page** in the next part of the process.

- **If you are conducting interviews via IM** you can summarize the conversation, copy and paste any important quotes, and **post it on wall of the group Facebook page**.

**The Interviewer's Role:** is **TO ACTIVELY LISTEN**, occasionally prompting the person being interviewed to be more descriptive or to enlarge their story. This type of interviewing is unique in that it is about **engaging someone to relive the experience** in addition to collecting valuable information. You can ask questions or prompt your interviewee to go into more detail by saying:

- Tell me more about . . .  Say more about . . .
- What happened next?
- What was it like for you to experience . . . ?
- What made that especially meaningful for you?

**Please Note:** If a **negative experience** arises during the interview, rather than try to steer your interviewee away from it, **help them become clear about ask them what they want more of** by asking **what is missing**, what is their image of **how the community ought to be**, and what they would **like to see different**.

**The Interviewee's Role:** is to **HELP YOUR INTERVIEWER TO EXPERIENCE** the feelings and thoughts about the situation you are describing.
You can schedule your time together now but do not start interviews until instructions are sent.

## Phase 1: Discovery Interview Questions

1. **PERSONAL STORY:** *Tell me a story about a time when you felt the **SRF principles & practices came alive** with **new meaning through the support** of the **SRF Global Young Adult community**. It may have occurred during a **life transition** (moving, traveling, going to school, starting a new relationship, getting married or getting divorced, starting a family, starting a new job, taking on more/new responsibilities at an existing job, etc.) **or** it may have been a **regular activity** you take part in at your temple.*

   *In what way did this experience **foster a special connection** to **other young adults** and how did it **vitalize the spiritual principles & practices** set forth by Paramahansa Yogananda?*

   - *What was **happening** at the time?*
   - *What were **you** doing?*
   - *What was the **primary objective** or **focus**?*
   - ***Who** was involved?*
   - *What **kinds** of interactions took place and **how** did others respond?*
   - *What happened as a **result**?*
   - *How did **you** make a difference?*
   - *What were **key lessons you learned** along the way?*
   - *What was the **ultimate outcome**?*
   - *How has this **outcome** been a **contribution** to your spiritual development? To the greater **community**?*

(**HINT:** It is not as important to answer every question as it is to **tell a complete story**. A story has a beginning, middle, and an end. Try to recall the details of what happened and the feelings involved.)

2. **PERSONAL QUALITIES & VALUES:** *What do you value most **about your story**? What do you value about the **community itself** and **being a part of it**? Without being modest, what do you **value most** about **yourself** and **your life**?*

3. **STRENTHS:** *Considering the objective to create a community of **connection, support**, and **spiritual growth**, what do you see is **already present** and **working well**? What do you want **more** of? If you received this, what would that **give you**? What are you most **grateful** for? What **strengths** do **you bring to the community**?*

(**HINT:** If you aren't sure what your strengths are you can take the VIA Strengths Survey at: http://www.viacharacter.org/Surveys/SurveyCenter.aspx [1])

**Personal Reflection: (optional)**
You can write about this in a personal journal if you like and if you so desire, share with the group. After you complete this section, reflect on what themes you see about yourself. What do you notice? With this new clarity, where might you employ your personal strengths, qualities, and values to support you in your present endeavors? If you were to better your relationship and learn more about someone in your life, who would it be? What best experience would you want them to share and how would it support you both? (Go for it!)

---

## PHASE TWO: Dream—"Vision Quest"

*"Imagination is not unreal; it is the borderland of what is yet to be real."* - Paramahansa Yogananda

In this phase, a vision will be built using the espoused values and stories from the discovery phase. Everyone is a dreamer and this is the place to let it out! Combined with phase 1: Discovery, you will have one week to complete the first part of this phase, to be completed by **January 14, 2012**.

Sharing Stories: You and your interview partner will **post each other's stories to the Facebook group page wall**. Comment on the highlights of your partner's story. What captured your attention or expanded your perception to see something new and different? What would you like to acknowledge your partner for?

Identifying Common Themes: As you browse the postings made by other interview pairs/groups, notice any themes. A theme is a word, idea, or concept that identifies what is important in their stories.

- **Read** through as many stories as you can.
- **Comment** on themes that you see under the stories that you read. Look for high points, core values, and thoughts that "grab" you.
- What are the **values and personal qualities** that you notice? Record themes you notice in the in your comments section below the stories you read. These will later be posted in a group poll for the next step "Choosing Themes."

**Choosing Themes:**

- From the list of themes on the Facebook Poll (posted by the group administrator at the end of the week), vote for **5 themes**. Select themes that you believe are the

[1] Via Institute on Character (2011). Survey Center. Retrieved from: http://www.viacharacter.org/Surveys/SurveyCenter.aspx

most important in creating a **thriving, connected, meaningful and engaged SRF Global Young Adult community**.

- Themes that receive the most votes will be announced to the group.

You will have one week to complete the next part of phase 2: Dream by **January 21, 2012**.

Visualizing the Future: Read the next questions, silently meditate, and visualize a possible future for the SRF Global Young Adult community. *What are **three wishes** you have for the Self-Realization Fellowship Global Young Adults community that would make it a **thriving, connected, meaningful,** and **engaged community** that **represent the themes and values**? If you were granted these wishes, how would the **SRF YA community** be transformed? How would the **community** look different than it is now? How would **you** be transformed? How would **your life** look differently than it is now?* **Write a brief description** of how you envision the future for the SRF YA community **as if it were already happening**.

**Instructions:** **Please be sure to write your vision in a document on your computer first!!** (This is to ensure that you don't lose your vision if Facebook loses it.) Next, **copy/paste it into a Facebook document** that you create (see documents icon at top of group page), **title your document** "[your name] Vision" and **post it** to the group.

Possibility Statements: These are the visualizations put into words. It is a positive image of the ideal outcome. The *Possibility Statement* captures the positive image of the ideal outcome in a short, 'sticky' (catchy or memorable) statement. In a brief statement, summarize your vision in words that capture its most vital essence.

**Examples** could look like, "We build a community through sharing our unique abilities," "We are a family who supports each other in times of need and transition," or "Through God and Guru, we are connected, and through our connection, we connect to God and Guru." **Make it personal**; make it **your own**.

- **Post your possibility statement to the group 'Possibility Statement' poll** (created by the administrator).
- **Vote for your top 3** possibility statement choices posted on the poll.
- The possibility statement that receives the most votes (or if there are more than one, a combination of all) will become the group possibility statement. This will guide the next phases of designing and creation.

Actualizing the Vision: In order to actualize or 'bring into form' the possibility statement, it needs to be articulated into a design question. Design questions are useful because they help you to know how to take action. Examples include: "How might our community bring awareness to each other's unique gifts and take better advantage of them?" "What if our global young adults community had a way to bring visibility to each others' needs and express their desire for support?" or "How might we create an inspiring space where people feel more connected?" The group possibility statement will be

reworded into a design question and posted for your vote. The final choice will signal the next phase: **Design**.

**Personal Reflection:** (optional) You can write about this in a personal journal if you like and if you so desire, share with the group. Wishes are powerful and often depicted as something that a genie grants in fairy tales. Genie comes from the word 'genius' and refers to the creative principle that is ignited in your dreams. Given the previous question, "How would your life look differently" if the vision were a reality right now, what possibilities stand out for you? Which may be closer within your reach than you realize? Expanding your perception, how would the world look differently if you were to make this vision happen? If you were to have your own possibility statement to represent this time in your life, what would it say? What does it say about who you are as a person and the role (for example - teacher, entrepreneur, etc.) you are called to play? What parts of your life (actions, events, etc.—big or small) are already in alignment with this role and vision?

## PHASE THREE: Design—"World Invention"

*"You must not let your life run in the ordinary way; do something that nobody else has done, something that will dazzle the world. Show that God's creative principle works in you."—Paramahansa Yogananda*

In this phase, you will become a 'design thinker,' unleashing your creativity through radical collaboration through brainstorming and prototyping to bring form to the vision and share it with the group. You will have **one week** to complete the virtual part of this phase by **January 28, 2012**.

Play 'Creative Radical': Next, read your interview partner(s)' vision (posted in the Facebook documents) in addition to **3 or more** visions written by others. You are going to play 'Creative Radical' which is a person who sees potential and possibility in the ideas of others and stretches their line of sight into new worlds. The Creative Radical says, "Yes, and you could . . . " Continue to use "Yes, and" to build on what each other says. Keep going no matter how wild or crazy the ideas may be and see what shows up. To make your comments, first go to the Facebook group wall and click on 'documents,' next click on the title of a member's vision where you can read it in full, and then post your comments.

Brainstorming: Playing Creative Radical[2] is the brainstorm session. Tips for the best brainstorming include:

- Post as many ideas as you can! In this case, **quantity counts!**
- **Suspend judgment** and write down every idea. 'Wild, silly, and out-there' ideas are encouraged just as much as 'realistic' ideas. Be bold!
- You **do not** need to worry about how to make your idea work.

[2] Johnson, R. J. (2009). Appreciative Inquiry Model for Personal Transformation—IRACE—Exploration Phase. Retrieved from: http://21stcenturyappreciativeinquiry.com/innovations/appreciative-inquiry-model-for-personal-transformation-irace-exploration-phase/

- Try to vary as many different **idea sets** as you can (For example, different types of self expression might include art, dance, acting, writing, speaking, clothing or hair style, bumper stickers, etc.)
- Within each idea set, try to **generate as many ideas** you can think of for each idea set (For example, for art: sculpture, watercolor, oil, acrylic, pen & ink, pastels, colleague, colored pencil, calligraphy, etc.)
- **Build on** your all of group members' ideas.
- **If you get stuck**, ask yourself where you can 'break the rules' or look at this with a different interpretation. How might this be simpler? What would a child you know say?
- **Have snacks**. Brain food can help keep the process going.
- **Standing up** can help as sitting is passive.

### Idea Reflecting:

- Once everyone has completed their Creative Radical brainstorm, **choose the idea** that was most **intriguing, silly, fun, or 'out-there'** by giving their commented idea a 'thumbs up.'
- Team up with others who were drawn to a particular vision or idea set for the next phase. If there are **six or more people**, **split up** into groups of 3 to 5 people. You may want to select groups with **people you do not know well** or would like to **know better**. **This will be your design group** and it is by no mistake that you have found each other. You share a common vision! **Come up with a team name.**
- Using the same modes of communication listed for interviewing phase 1: Discovery, **connect with your group** to decide on your team name and talk about your ideas using this document to keep track of your notes.
- **Create a team document** on the Facebook group especially for your group with the **team name as your title.**
- **Create a team photo/video album** (entitle it your team name) on the Facebook group where you can **post your prototypes** as you create them. To access your team's album, go to the Facebook group wall and click 'photos' next to the 'documents' link.

## PHASE THREE (Part II): Design—"World Invention"

*"You must not let your life run in the ordinary way; do something that nobody else has done, something that will dazzle the world. Show that God's creative principle works in you."—Paramahansa Yogananda*

You will have **one week** to complete the second part of this phase by **February 5, 2012**.

**Form Design Teams:**

- Team up with others who were drawn to a particular vision or idea set for the next phase. If there are **six or more people**, **split up** into groups of 3 to 5 people. You may want to select groups with **people you do not know well** or would like to **know better**. **This will be your design group** and it is by no mistake that you

have found each other. You share a common vision! **Come up with a team name.**

- Using the same modes of communication listed for interviewing phase 1: Discovery, **connect with your group** to decide on your team name and talk about your ideas using this document to keep track of your notes.
- **Create a team document** on the Facebook group especially for your group with the **team name as your title.**
- **Create a team photo/video album** (entitle it your team name) on the Facebook group where you can **post your prototypes** as you create them. To access your team's album, go to the Facebook group wall and click 'photos' next to the 'documents' link.

Prototype: A prototype is a visual representation of an idea or set of ideas in the form of pictures, models, or skits used to convey how it works to others. It is meant to be rough so that others get a 'gist' of how an idea works but is ambiguous enough for them to imagine other possibilities to build on it, change it, and further refine it. The prototypes you will build are not to be an exact replica of the real thing.

**Creating Prototypes:** In your design group, you can create prototypes together or individually using an assortment of media. Designers have noticed that creating works best when in an open environment with natural lighting, lots of work space, and gives a sense of inspiration.

- Create **rough representations** through picture, model, skit, song, plan drafts or any other method you dream of. **Post your media** to the team album you create in the Facebook group. You can take a picture of your model and post it or record a video of your skit, etc. and post that to the album as well. You can also post web links to ideas in your team document as ideas.
- **Remember the possibility statements** and **visualizations**. **Recall some of the stories you read** from the discovery phase. Let the prototype take form around these themes and how it would contribute to others. Keep others in mind when you design.
- **Ask your group members** to help you if you get stuck or need support. As you build, talk it through describing your rationale for how it works and what is most compelling about the idea.
- Don't worry if the prototype is 'flimsy,' just focus on whether it **captures the essence** of the idea.
- **Keep them simple.** The more ambiguous, the more open to interpretation which will help the prototype to evolve in unique ways.

**Please post your prototypes early in the week so that you have enough time to get feedback!**

**Team Feedback:**

- Within your design team, talk about your prototype idea(s) describing how it looks or works either in the comment section under your photo/video in the team

album or in the team document. **Post as many pictures, videos, drawings, plans, etc. as you like!**

- Connect how the prototype would **achieve the vision** and how that would **reflect a thriving, connected, and engaged community**.
- Each of **your team members** share **what they like best** about the prototype and **what their wishes are** for it by using the comment function. (For example, "I like the idea of going on hikes in the mountains. I wish this event wasn't taking place during the hottest time of the year.") Feedback is **most helpful** and **best received** when given in **positive** fashion.
- **Request feedback** from at least 2 to 3 members **from other design teams** for one of your prototypes (if more than one) and link your prototype post to your request. Do this by sending a Facebook message to the people from whom you would like feedback.
- Use this feedback to **step into another's shoes** and feel what this prototype would be like in their world. Your **empathy will guide your prototype** iterations and steer modifications toward a successful prototype. Make your main goal of this step to **benefit them**. In other words, rather than focusing on moving closer to your goals, this is about moving them closer to theirs.

**Personal Reflection:** (optional)
You can write about this in a personal journal if you like and if you so desire, share with the group. Where else in your life could you play "creative radical" to innovate new ideas? Whether with a group or on your own, keep a log of ideas for something you are currently working on. Be sure to record ALL of your ideas and categorize them into two classifications: 'realistic, possible, or believable' and 'silly, out there, or crazy'. If you can't come up with any wild ideas, just find some kids to help you. One way designers 'think outside the box' is by combining ideas together to invent something completely new. For example 'personal computer + notepad = iPad.' Most ground-breaking innovations are 'realistic' ideas combined with wild ideas. See how many different ways you can match up your idea categories using sticky notes to play with different arrangements. Have fun with this!

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This next step will happen during an in-person design summit:

**Design Summit!** During the design summit, design teams are invited to participate in a group gathering where they may continue to build on prototypes, start new ones, and share with the whole group. The Design Summit will be held on **January 28th, 1:00—3:00 PM** at **Lake Shrine Temple** in Pacific Palisades, California.

**What's Next?:** Bring your ideas, your prototypes, and print out your team's feedback posts to guide the next step. You can bring your craft, art, or technology materials (i.e., laptops, video cameras, etc.) with you to use in refining your prototype ideas or creating new ones. We will repeat the prototype steps but this time, together where personal connection can transcend virtual communication and bring a new dimension to the creativity. This is meant to be engaging, fun, and meaningful . . . for whatever you create, you will be called to take action on.

**Whole Group Feedback:** After an hour of team prototyping and feedback sessions, **each designer** breaks out and in round robin fashion to meet with other designers. Remember to use this feedback to **step into another's shoes** and feel what this prototype would be like in their world. Your **empathy will guide your brainstorm** and **prototype** iterations and steer modifications toward a successful prototype. Make your main goal of this step to benefit them. In other words, rather than focusing on moving closer to your goals, this is about moving them closer to theirs.

- Each design team will visit every other design team to view to brainstorm and prototype.
- Teams will **ask questions** and experience how a prototype works.
- Note what personally gets you excited about a prototype. What is **extraordinary about this prototype** and **the designer** that created it? How do you see this prototype fulfill the **vision** for the SRF global young adult community?

**Using sticky notes**, write feedback from these next steps and **post them** to the design teams' poster paper. *(Each person will have a sticky note pad, pen, and each team will have poster paper with their name on it and a brief description of their vision.)*

- Be a **Creative Radical** and submit "**yes, and's**"
- **Submit** "**I like; I wish**" feedback
- Suggest ideas for how each team could take **action to realize their prototype** to come to life. How many different ways can this prototype be interpreted and brought to life?
- **Thank the design teams** for hearing your presentation and providing feedback.

Reflect & Support: It is critically important that what you initiate receives as much support as possible. The saying, "All of us are smarter than any of us" epitomizes the concept of radical collaboration. The next set of questions are to be discussed in the small design teams for about **15 minutes** and then shared with the whole group. Take a few minutes to reflect and record your answers to the following questions.

- *What are the 'nuggets' you have gleaned as a result of this experience?*
- *What do you want to be acknowledged for?*
- *What are you most grateful for right now?*

Gratitude: Gratitude is the fuel that keeps us going, that courageously continues on in the face of doubts, and inspires our spirit. Much work has been accomplished and it's time to acknowledge it. The whole group will stand in a circle and go around to each person who will answer the question, ***"What do you want to be acknowledged for right now?"*** in one word. At the end, you can also acknowledge each other for what you most admired, found helpful, or were delightfully surprised by. This concludes our design summit and the next step for virtual collaboration will be announced to the group.

**Share:** When you return to the Facebook group, **post your insights and 'nuggets'** from the design summit experience **to the group wall** so others can hear about your experience. You can ask questions and make comments to others' wall posts.

----------Completion of Design Summit----------

## PHASE FOUR: Deliver—"Liftoff"

Thinkers do not accept the inevitable; they turn their efforts toward changing it. The season of failure is the best time for sowing the seeds of success."—Paramahansa Yogananda

In the deliver phase, design team prototype will be tested. An initial test will uncover more information that will be useful in actualizing the prototyped ideas into the world. That information may lead to more ideas, consider ways to overcome emergent obstacles or take advantage of new opportunities. Change is always happening and while it is perfectly fine for the prototyped idea to work as it was designed, it's okay if it doesn't work. Ideas that 'fail' unlock robust ideas that are more sustainable and bring about an even better outcome. The best designers aim to fail early and often to learn sooner than later. You will have **1 week** to complete this phase, by: **February 12, 2012.**

**Discuss as a group:** In your design team, review the suggestions given by the other design teams and discuss virtually (use your team document to write back and forth, use video, phone, etc.) the following questions.

- *How many **different** ways can we realize our prototype?*
- *What does our work look like in **1 week** (short term), **1 month**, or **a year** (long term)?*
- *What **specific action** or set of action(s) is **each person willing to take** in order to carry out the next step?* (**Hint:** choose small steps that have greater impact)
- *When will you have **completed** your action(s) by? Who will check in with you to ensure you are on track?* Devise who will check in and when. Everyone gets a **check-in buddy**.
- *What is it you **hope to discover** and **learn** from taking the first steps?*

**Record important information** where you can access it later in your phone, planner, or use a sticky note to put somewhere as a reminder. Include a note to remind you to check in with your buddy. **Write your specific action in the group calendar**: https://www.facebook.com/groups/306779586021043/doc/334866899878978/

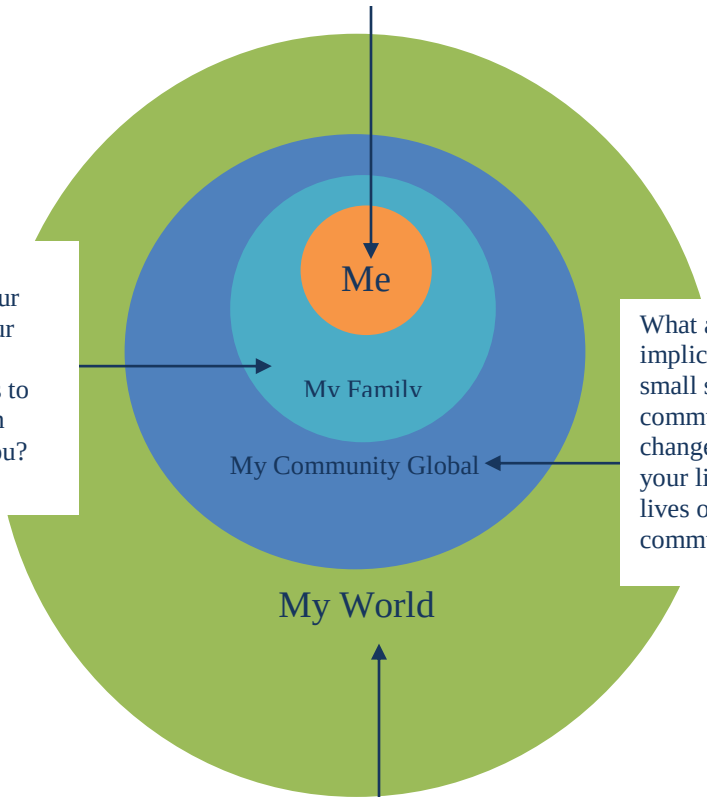
**Recommendation - Make it Visual**: Identify a place where your actions to be taken, the prototype and visualization they bring to life, and the possibility statement they embody are **made visible to you on a daily basis** (for example, as a screen saver). Visual reminders can be **powerful ways** to **stay focused** on the process.

**IMPORTANT! TAKE ACTION: Complete** your **initial (short term) action**/prototype test within one week, by **February 19, 2012**. Beginning the moment you take action, you can share your progress with the group. The next week begins **Phase 5: Valuate** where you get to refine your prototype and retest. People in your group and community will be interested in what you are doing, especially in what you are learning and how you are changing. In phase 5, you keep them up-to-date.

**Personal Reflection:** (optional) You can write about this in a personal journal if you like and if you so desire, share with the group. Think of a time (as recent as possible) where you felt that you 'failed' at something and what you wished you would have done instead. As you reflect on that time, focus on what lessons were valuable out of that experience. If you hadn't learned the lessons of that experience, what mistakes could have occurred later down the road? How has the wisdom of experience guided you to do life differently? Is there something you would like to try but fear you will fail at? What's the price you pay for not trying and is it worse than giving it a try? If you were to 'prototype' a small step, how would it look? Who would you want on your 'design team' to support you?

Consider the implications of 'making it possible' and 'building it together' using the **Ripple Effect Model**. When you toss a stone into a pool of water, it creates ripples just as action creates transformative change. This is to help you realize how big 'little' steps truly are. You make the difference.

You are the proverbial 'stone' that creates ripples which extend into larger circles within the world. When you demonstrate your values, strengths, and creativity, how do you affect others around you?




What are the implications of your small steps for your family? How can change that occurs to your life transform those nearest to you?

What are the implications of your small steps for your community? How can change that occurs in your life transform the lives of others in your community circles?

Combining the effects of your small steps on you, your family or those nearest to you, and your community impact the world? All 'small' things gather momentum as ripples in a pond. What surprises you most by what you see here?

## PHASE FIVE: Valuation—"We Make It Possible"

"Persistence guarantees that results are inevitable."—Paramahansa Yogananda

**Valuation** is a process that looks at 'what worked' and the 'best of' the implemented test. It is designed help you to understand what to do **MORE of in the future**. It is different from ***evaluation*** which seeks to measure the result to a previous set of expectations. Valuation drops the "should" in the sense that the test *should* have gone a particular way or produced a particular outcome. Since there is no expectation, only to create more of what is working, valuation is the method you will use to observe the fruits of your creative efforts. Remember, this is a learning experience and what you might call a 'mistake' or 'failure' is just as valuable as successful execution.

**Taking Action:** This phase begins the moment you take action so you can report on your progress. **Create a new Facebook group document** and **entitle it with *your* name**.

Use your document to post updates to share. Be sure to have posted a report on your progress by **February 18, 2012** so that others can check in on the evolution of your/design group prototype.

You will have until **February 19, 2012** to complete this last phase.

**Requests of Support:** Make requests for support to others and check in with others' progress by clicking on their document and leaving comments. The following steps and example questions provided below are there as a guide during this phase of the process. There is more flexibility because everyone will progress at different rates and be at various points in the valuation cycle.

**Valuation Cycle:** The valuation cycle is really not much different than the previous steps. People in your group and community will be interested in what you are doing, especially in what you are learning and how you are changing. In this phase, you keep them up-to-date. As you are experimenting and learning, communicate what is working for you.

As you explore and experiment here's some further ideas on what to communicate:

- **Who else** are you currently working with to help you execute your actions?
- What new uses of **technology** support you to move forward?
- What "noise" you have learned to pay attention to? "Noise" is something that appears to be a distraction but is actually important **once you stop to listen**.
- What **surprises** have you discovered?
- **Share experiment results** even if your experiment is still under way so others learn too.
- Tell all of your supporters about **your hopes and dreams**. **Share your passion** and your **progress** with others, even if they aren't in your network.

1. **Re-Discover:** Share the best of your implementation experience so far. You can report your own story or interview your original partner as you did at the very beginning.
    - What worked? What might you do differently or try next?
    - What are you most proud of (even if it didn't come together the way you envisioned)?
    - What personal qualities and values are at work? Look into what strengths are present.
    - What valuable learning has transpired as a result of this experience?
    - How have you already made a contribution to the community?
    - Who else would be beneficial to talk with?
    - How does your current situation uncover new opportunities or potential benefits?

2. **Re-Dream:** Re-look at the original possibility statement and consider if it has taken on new meaning, shifted in some way, or still holds as strong as it did during it did at conception.

- What new values or themes are emerging?
- What new wishes do you have? Do a second visualization and share what has transformed.

3. **Re-Design:** Re-look at the original design question and consider how well it still takes the group in the direction of the objective.
    - Would it make sense to create another design question?
    - How is your prototype evolving? What would you like more of? Using the principles learned, ask for a new brainstorm session based on your visualization.
    - Show modifications in your prototypes and allow others to provide feedback. Share video, pictures, or any available media that the whole group can see and provide supportive feedback on.

4. **Re-Deliver:** Clarify actions that you will take and what it is you hope to learn from them. State by when you will complete your actions.
    - What would you like to be acknowledged for at this point?

5. **Re-Valuate:** Repeat the valuation as many times as needed to achieve the desired outcome of the targeted objective. Valuation may occur as frequently as necessary to move the process forward. When change is rapid, the cycles may take place more frequently and when change is gradual, the cycles may happen less frequently. The process may end for a particular objective, maintain an objective, or begin anew with a fresh objective.

**Personal Reflection:** (optional)
You can write about this in a personal journal if you like and if you so desire, share with the group. Your life is your own personal journey and everyone in it is on your team. If you were to call a ‘team valuation’ what objective would you like valuated? How might this process benefit your and others’ life goals? You can call your own ‘treasure hunt’ or ‘vision quest;’ break out a design session or a building strategy with your team. Taking an appreciative approach with curiosity about what is valued and working combined with learning through trying out new ideas builds a foundation for dreams to take shape. Share your journey with others and acknowledge the contributions that you make.

## Appendix E: Emails to Participants

Dear SRF YA Devotee,

I am currently a student at Pepperdine University and am in the process of conducting research for my thesis project in partnership with the SRF Global Young Adult Community. My research explores the application a process called 'AI.d' in virtual communities and its capacity to enable collaboration and innovation among community members.

You are invited to participate in an online survey so I can learn about your participation, relationships, and collaboration within the global community. You do not have to answer any of the questions that you prefer not to answer—simply leave such items blank. Your participation is strictly voluntary and your responses will be kept anonymous and confidential.

Completion of the survey will take approximately 15 minutes. **Please complete this survey by January 7, 2012**.

**Click the link to take the survey: [Link]**

Participation in the 6-week virtual collaboration on Facebook will begin in one week on: **January 8, 2012**. You will receive additional instructions at the beginning of each week. You may decline to participate in part or all of these activities. If you would rather decline, simply send me an email to let me know. Your participation makes an invaluable contribution and is much appreciated. You will receive initial instructions and project details shortly.

Should you decide to participate in this research, a consent form will appear at the beginning of the survey. Please read it closely and contact me with any questions that you may have.

Thank you,
Colleen Holt

_____
[contact information]

Reminder Email

Dear SRF Devotee,

This is a friendly reminder that you have been invited to take a survey to learn about your participation, collaboration, and relationships with the SRF young adults. The topic of research explores the application of the AI.d process in virtual communities and its capacity to enable collaboration and innovation among community members.
Because the responses to this survey are anonymous and confidential, I do not have records of who has or has not completed the survey so I am sending this email to all group members.

If you have already completed the survey and are making preparations to select an interview partner for our Facebook collaboration beginning on January 8, 2012, then thank you and please disregard this email. (See instructions in PDF attachment.)

If you have not already done so and are interested in taking the survey, please do so by the deadline, **January 7, 2012.**

Your participation is strictly voluntary and your responses will be kept anonymous and confidential. Completion of the survey will take approximately 15 minutes.

**Click here to take the survey: [Link]**

Please let me know if you have any questions or if you have decided to decline your participation.

Thank you,
Colleen Holt

_____

[contact information]

Dear YA Devotee,

Your participation has been instrumental in understanding how to engage virtual communities in collaboration and innovation using the virtual AI.d process.

I want to thank you again for your contribution to this work as well as your community and invite you to participate in the final survey so I can learn about your experience with AI.d, its impact on your relationships and collaboration, how you perceive its effectiveness, and whether you find it valuable.

**Regardless of how much or how little you actually participated in the process, your input is very valuable!**

The survey is online and your responses will be kept anonymous and confidential. You do not have to answer any of the questions that you prefer not to answer—simply leave such items blank. Your participation is strictly voluntary. Completion of the survey will take approximately 25 minutes. The deadline to complete this survey is **February 29, 2012**.

**Click here to take the survey: [Link]**

If you would rather decline, please email or message me and let me know.

Your support of my thesis research has been greatly appreciated and I hope you decide to complete the final survey. Again, your responses to the survey are valuable in my learning regardless of your level of participation in the virtual 6 week process.

As a reminder, a summary of the study results will be provided upon your request.

Thank you,
Colleen Holt

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[contact information]
Reminder Email
Dear YA Devotee,

This is just a friendly reminder that you have been invited to complete the final survey. Because the responses to this survey are anonymous and confidential, I do not have records of who has or has not completed the survey so I am sending this to all participants.

If you did not take the original survey, you are still encouraged to respond. All you need to do for the first question is enter a made-up ‘code name’ to ensure confidentiality. For example, you can use the name of a favorite pet and your age (“Roxy25”).

**Regardless of how much or how little you actually participated in the process, your input is very valuable!**

The work you have done in this study is a great contribution to the field of organizational development, specifically, understanding how processes like AI.d conducted virtually impact collaboration and innovation. Your participation in the final survey helps me to learn about your virtual experience with AI.d, its impact on your participation, collaboration, and relationships, as well as how you perceive its effectiveness and value.

If you have already completed the survey then thank you and please disregard this email. If you have not already done so and are interested in taking the survey, please do so by the deadline, **February 29, 2012**.

Your participation is strictly voluntary and your responses will be kept anonymous and confidential. Completion of the survey will take approximately 25 minutes or less.

**Click here to take the survey: [Link]**

Your support has been greatly appreciated and a summary of the study results will be provided upon your request.

Thank you,
Colleen Holt

_____

[contact information]

## Appendix F: Emailed Invitation to Participate in the Design Summit

Dear SRF Devotee,

Your participation throughout the virtual AI.d process has been a contribution to the young adult community and to my thesis research on participation, virtual collaboration, innovation, relationship building, and goal realization.

This letter is to invite you to the AI.d design summit taking place on **January 28, 2012** from **1 to 3pm**, held at **Lake Shrine Temple, Pacific Palisades, CA**. The design summit is a continuation of the design phase you have begun virtually on Facebook. This is an opportunity to collaborate in person to continue building on your ideas, work with other groups, and give/receive feedback.

The design summit will last approximately two hours and is completely voluntary. You are welcome to bring any materials you like to help you in creating prototypes such as arts and crafts supplies, digital devices such as a camera or computer, or office supplies like notebooks. Some crafts and office supplies will be provided.

If you would rather decline to attend the AI.d design summit, please email or message me on Facebook and let me know. You may decline your participation any time prior or during the summit.

I appreciate your consideration and hope you decide to attend the summit.

Thank you,
Colleen Holt

_____

[contact information]