

Training Design

The Strategy Exchange

The Strategy Exchange described in these pages was developed for the 1981 National Conference on Volunteerism by Susan J. Ellis, in cooperation with Ivan Scheier, Eva Schindler-Rainman, and Marlene Wilson. All four trainers refined the design and were present in Philadelphia when the Strategy Exchange was run for more than 300 Conference participants. Since then, quite a number of requests have been received for the complete instructions on how to implement a Strategy Exchange exercise elsewhere--and several regional conferences have indeed offered their own versions during the past year.

The following describes the objectives, design, and logistics of the Strategy Exchange as it was run in Philadelphia at the National Conference. Readers are urged to adapt this material to suit the needs of their own groups.

STRATEGY EXCHANGE

RATIONALE: As conferences grow in size, it becomes harder and harder for participants to meet people with mutual interests. Also, many veterans are becoming bored with the standard conference agenda mix of speakers and workshops. If a conference could arrange for a large number of participants to come together in a large room for a good block of time, a minimal amount of structured exercise could facilitate meaningful interaction.

STRATEGY EXCHANGE OBJECTIVES:

1. To enable participants who share common goals, concerns, etc. to meet one another:
 - a. to encourage further one-to-one or small group meetings informally during the remainder of the conference;
 - b. to break down the feeling of being overwhelmed by the size of the conference, and therefore remaining rather isolated within the crowd.
2. To facilitate meetings that "match" those with questions to those with answers (or at least with some workable ideas or past experience):
 - a. to demonstrate that everyone has something to offer as a "resource" to someone else;
 - b. again, to encourage further informal meetings during the conference.
3. To visibly involve our field's top trainers as a motivator and support to group interaction:
 - a. to utilize these trainers as facilitators "on the floor" during the exchange period and then as "summarizers" and "highlighters," commenting on observations;
 - b. to assist in matching up people, based on prior acquaintance with many of the participants and on-site observation.
4. To generate energy and excitement from the very experience of seeing a ballroom filled with people, but then becoming a giant "resource

center."

POSSIBLE PITFALLS TO AVOID:

1. That the session seem disorganized, noisy, etc.
2. That people are unsure of what to do and so begin to drop out of the exercise.
3. That people are more interested in the national trainers than each other, and so try to "grab hold" of one during the session.
4. That people feel frustrated at the fact that the national trainers will not do a major presentation during this period.
5. That people feel uncomfortable sharing whatever information/experiences they have and constrained because they are not "experts" (whatever an expert is!).

Careful planning and enough facilitators with full instructions can avoid these pitfalls.

ROOM ARRANGEMENT: Select largest open space room (in Philadelphia this meant the Grand Ballroom). Arrange chairs in small group circles clustered around posted signs (this may mean clustered near to the walls, or around free-standing easels as well). Chairs may be set up in the center of the room in rows for the opening and closing. At least one microphone is needed at the head of the room. Two more standing mikes near the center of the room would be helpful, too.

SUPPLIES/EQUIPMENT NEEDED:

Large signs or sheets of newsprint on which to print topics	Balloons (helium-filled) with long strings-- enough for all facilitators (note: funny hats or big bow ties can also work well)
Masking tape	Self-adhesive "dots" in <u>two colors</u> -- enough for all participants
Marking pens--enough for all groups	Copies of Strategy Exchange instructions
Copies of "Exchange Slips"-- at least 5 for each participant	

PREPARATION: The key to the Strategy Exchange is preparation. Select and orient a sufficient number of local facilitators (the Philadelphia session had approximately 15 facilitators for a group of 300 participants). The most important thing is for the facilitators to understand fully exactly how the Strategy Exchange will work. Their role is to: make sure everyone is following instructions; answer individuals' questions as they arise; notify the trainers of special needs. Facilitators may participate in the Strategy Exchange along with everyone else, but should be alert to situations needing attention.

Topics need to be selected (get ideas from lots of sources) and must be clearly labelled onto individual signs. Choose topics that are skills-oriented, rather than setting-oriented (or else you will constantly cluster museum people with other museum people, hospital folk with hospital folk, etc. and

defeat the purpose of the Exchange). Topics used in Philadelphia included:

- Utilizing Teenage Volunteers
- Recruiting Church Groups
- Recruiting & Utilizing Newcomers/Immigrants
- Older Americans as a Resource
- Tapping Corporate Volunteerism
- Newsletters and Other Communication Ideas
- Getting Press Coverage
- Assignments for Homebound Volunteers
- Ideas for Inter-Generational Programs
- Children as Volunteers
- Getting the Most from Advisory Councils
- Recruiting in Rural Areas
- Recruiting in the Inner City
- In-Service Volunteer Training Programs
- Utilization of Volunteers with Disabilities
- Getting In-Kind Donations
- Techniques for Evaluating Programs
- Techniques for Evaluating Individual Volunteers
- How to Organize Bartering
- Successful Money-Making Events
- Management Techniques for Large Volunteer Programs
- Starting a DOVIA
- Starting a VAC
- Starting From Scratch
- Ideas for Research Topics
- OTHER

Instructions for the Strategy Exchange and sample "Exchange Slips" should be placed in the registration packets of all conferees, so people can familiarize themselves with the concept before the event. Also, the list of selected topics should be included in the packet or posted prominently prior to the Exchange time. Here is exactly what participants received in their packets in Philadelphia:

* * * * *

The 1981 National Conference on Volunteerism is delighted to offer participants a unique afternoon on Thursday, October 15: "The Strategy Exchange." So that everyone can get the most out of this experience, we ask you to read this sheet before Thursday afternoon.

Objectives:

The objectives of the Strategy Exchange are:

1. To enable participants who share common goals, concerns, etc. to meet one another, and:
 - a. to encourage further one-to-one or small group meetings informally during the remainder of the Conference;
 - b. to break down the feeling of being overwhelmed by the size of the Conference.
2. To facilitate meetings that "match" people with questions to people with answers--or at least with some workable ideas, past experience, or the desire to team up to look for answers!
 - a. to demonstrate that everyone has something to offer as "resource" to someone else;
 - b. again, to encourage informal meetings during the rest of the Conference.
3. To generate energy and excitement from seeing a ballroom filled with people become a giant "resource center."

How It Will Work:

When you enter the ballroom, you'll be given a color-coded tag to wear. This is very important because it will divide the whole group into two halves. At any given time during the Exchange, half the participants will share information, while the other half will be free to move about, ask questions, make contacts. **EVERYONE WILL HAVE THE CHANCE TO PLAY BOTH ROLES!**

Susan Ellis will open the afternoon with a review of instructions. Facilitators will be on duty all around the ballroom, indicated by yellow balloons. Ivan Scheier, Eva Schindler-Rainman and Marlene Wilson will be

on hand to assist on the floor and to make closing remarks at the end of the afternoon.

All around the ballroom will be banners indicating a specific topic of interest to volunteer program managers and others in volunteerism. At least 20 topics will be listed. At Susan's signal, half the group will select a topic on which they feel they can be of help to others and will go and stand under that banner. Then the other half of the group will be free to go to whatever subjects are of interest to them (you may go to as many topics as you have time for in the 45 minute Exchange period allotted for each half). Resource givers, however, will remain under their banner for the full 45 minutes--then they get the chance to switch roles.

Important:

The success of the Strategy Exchange depends upon your willingness to interact with others and to follow the instructions given. Please remember that there will not be time to go into much detail with all the people you will meet during the Exchange. Rather, look upon this as an opportunity to **MEET THE PEOPLE YOU WANT TO CONNECT WITH LATER IN THE CONFERENCE--AND EVEN AFTER YOU RETURN HOME.**

It is so easy to spend Conference time "visiting" with old friends and never realizing that the person next to you in the elevator has some key information you could tap (and vice versa). So the point of the Strategy Exchange is to allow you to find those conferees who share your concerns. The rest is up to you . . . use meal times, late night pajama talks, limo to the airport talks--whatever time available to have a conversation that just might make the whole Conference worthwhile for you! And follow up later with an exchange of letters and materials.


So that you can prepare for the Strategy Exchange, your packet contains several **EXCHANGE SLIPS** to fill out prior to Thursday (more will, of course, be available in the ballroom during the session). Bring along your business cards and extra program brochures, too. Remember, this is an exchange!

All of us who planned this afternoon are looking forward to it with great anticipation. It is a direct response to those of you who commented last year that we were getting "too big" for all the contact-making you wanted to do. We welcome your feedback after the Strategy Exchange and encourage you to make the most out of this unique opportunity.

Have fun!!!



This is a sample "Exchange Slip":

	<u>EXCHANGE SLIP</u>
Name: _____	Hotel Room No.: _____
Organization: _____	
Address: _____	
Telephone: _____	
Summary of why we are making this Exchange: (information promised, subject of mutual interest, etc.)	

THE DESIGN: The Strategy Exchange ran for 2½ hours, from 2:15 to 4:45 p.m. The following is the "script" for the session as it was run in Philadelphia:

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|-----------|----------|---|
| 1:00 p.m. | 75 mins. | <u>Room set-up and facilitator orientation.</u> Topic signs posted around ballroom. Chairs arranged. Balloons attached to facilitators. Some facilitators stationed at doors to keep early arrivals out and then to place dots. Microphones tested. Extra instructions and Exchange Slips placed in piles around room. |
| 2:15 | 15 mins. | <u>Doors open.</u> As people enter the ballroom, facilitators at the door place a self-adhesive colored dot on each person's nametag (note: cards in two colors can be substituted, if necessary). Care is taken to give out an <u>equal number</u> of dots of each of <u>two colors</u> , effectively dividing group in half. People then familiarize themselves with the room arrangement and note where each topic has been located. |

- 2:30 10 mins. Welcome and instructions. Lead trainer encourages everyone to enjoy the process. Re-emphasizes that the point is to meet people that you'd want to spend more time with later, not to get lots of "answers" now. Explains use of Exchange Slips for this follow-up purpose.
- First half of group (example: red dots) then told to select a topic, go to the designated area now, and stay there for the first exchange. The red dots will be the "consultants."
- When red dots are settled, second half (example: blue dots) are told that for the next 40 minutes they may go to as many topics as they wish, meeting people and filling in Exchange Slips. The blue dots will be the "inquirers."
- 2:40 40 mins. FIRST EXCHANGE occurs.
- Note: Trainers and facilitators need to be sure everyone seems involved as the Exchange period begins. Also, if anyone wishes to offer a topic in the "Other" category, he or she should approach the lead trainer who will make the announcement at the microphone.
- 3:20 10 mins. Switch. Lead trainer tells everyone to "freeze." Now the blue dots are given the instructions to select a topic, go to it, and remain there as "consultants." When they are settled, the red dots are now free to move around as they wish, as "inquirers."
- 3:30 40 mins. SECOND EXCHANGE occurs.
- 4:10 35 mins. Exchanges end. Group takes chairs into center. Trainers, who have been floating during both Exchange periods, now make observations on what they heard. Microphones are open to all participants to share new ideas that surfaced during the exchanges. Participants can be asked to make notes on newsprint under each topic, listing ideas discussed, so that the sheets can be posted for the rest of the conference.
- 4:45 Session ends. (Adjourn to cash bar!)

ADAPTATIONS: There are many ways to vary the theme of the Strategy Exchange. For example, four exchange periods of twenty to thirty minutes each could be offered, rather than two longer ones. No formal breaks are necessary, but having refreshments available in the room would be nice. National trainers are certainly not necessary, but it is helpful to have at least a few people acting as observers/commentators. At the close of a conference during which a Strategy Exchange has been offered, "reports" might be given on how many follow-up meetings indeed happened as a result of the "Exchange Slips."

SUMMARY: Though requiring preparation, the Strategy Exchange is actually a simple idea. Feel free to use the concept, if not the specifics. The key is realizing that everyone has something to offer, as well as having mutual questions. The Strategy Exchange, therefore, is a design that can be used in DOVIA meetings and with smaller groups of all sorts. People too often sit next to others for a long time without realizing that they may have some important things in common or may be resources for one another. The Strategy Exchange is a tool to facilitate such discoveries.

Editor's note: This has introduced a new, periodic JOURNAL feature: training designs. The Journal is seeking examples of training ideas adaptable to many situations. Prospective contributors are urged to follow the format of the way in which the Strategy Exchange is presented here.