

# IDP DESIGN

Co-designing the future  
of the humanities PhD



Pilot project report  
July 2023



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## Introduction

**TRaCE Transborder** seeks to transform the challenges that humanities PhDs face into global opportunities. Despite the valuable skills students gain while completing their degree, they experience difficulties that include:

- Long completion times
- Poor employment prospects
- Protracted transition to career paths
- Low social impact

Solving these challenges requires a creative re-thinking of the PhD process and the ways in which students interact with the world outside of the university.

The **catalyst for this collaboration** was to begin experimenting with ways to leverage the library of TRaCE narratives to enrich the experiences of current PhD students. Two challenges were identified: first, doctoral students have limited professional contact with individuals and communities outside of academia; second, doctoral students are asked to build their professional development journeys basically in isolation. Similar challenges were also noted about the formulation of their thesis projects, which are usually defined with the support of the academic supervisor (and sometimes other members of the thesis committee), and the level of support during that formulation process ranges from very hands-on to almost completely hands-off.

These obstacles were what led to the **formulation of the IDP Design program**, which is a component project of TRaCE Transborder. IDP Design leverages the TRaCE database of interviews with PhD graduates to inspire students with ideas about non-academic career pathways that might be of interest to them. It also leverages collaborative problem-formulation and solution-ideation techniques drawn from the world of design thinking. The stages of the IDP Design process are laid out in Figure 1 below.

The **objective of this collaboration** is to conduct an in-situ test of this new approach, to understand what benefits it might offer to students and to inform revisions to the program structure to increase its value.

The **structure of this document** follows the stages of the IDP Design program. In essence, it acts as a “field diary” of the program. Each section covers the overall approach, preparatory work undertaken, notes on the execution of the stage, relevant artifacts and finally some notes on how the process might be improved in future iterations. These last two—the artifacts and the potential upgrades—are of particular value to those looking to bring IDP Design to their institutions.

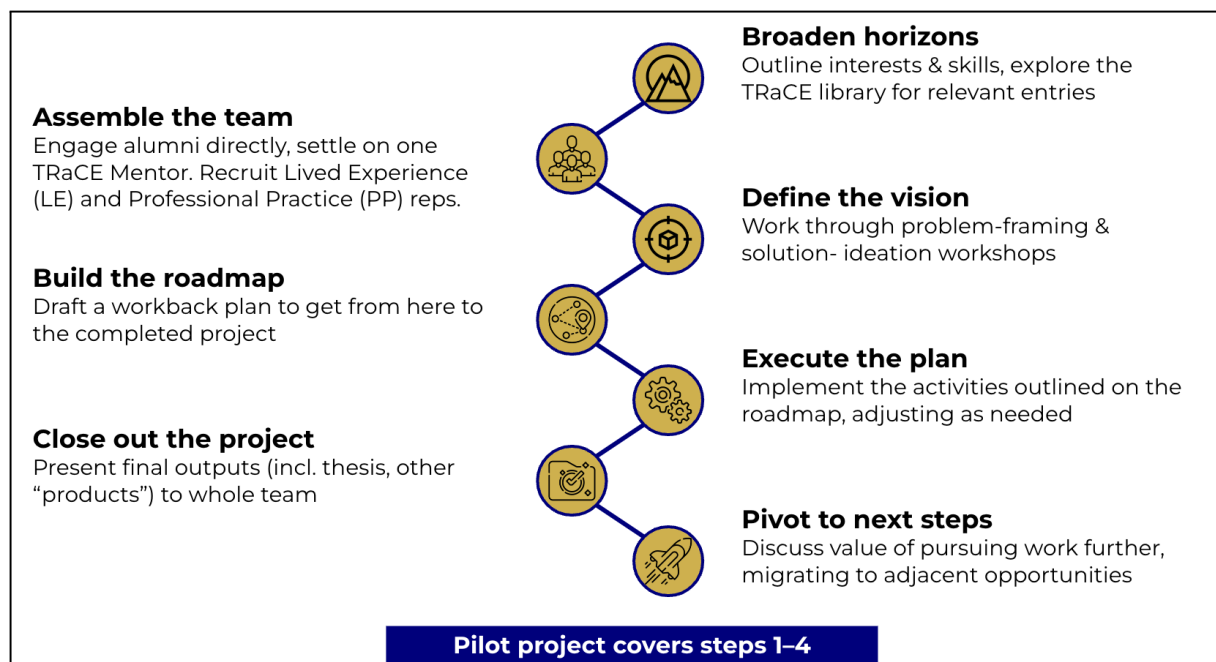


Figure 1: Steps of the IDP Design process

Source: internal project materials

## Stages of the journey

### Student recruitment

#### Approach

To raise awareness about the pilot, the facilitator and the TRaCE PI visited several graduate “professional skills” **seminars for PhD students**, taking a few moments to introduce the concept, take questions, and outline next steps for the students interested in participating.

The intention had been to have an **open application process**, with submissions assessed according to a rubric to determine the quality of fit between the applicant and the program. However, due to delays in the administrative process of getting contractual matters sorted out, there ended up being too little time to run such a process. Furthermore, the number of applicants demonstrating keen interest to join the pilot matched our capacity, and so there was no need for a selection process to determine who would be able to participate.

#### Preparation

The facilitator and the PI agreed ahead of time on the **structure of the presentation**: the PI would talk about TRaCE and the challenges of transitioning to non-academic employment, then handing the baton to the facilitator to discuss the IDP Design process in particular and how it

was tailored to address these barriers. From there, the two handled questions together, and indicated to students that if they were interested they should email both the PI and the facilitator.

## Execution

The presentations were, in general, very positively received. The students recognized the challenges of employment post-completion and saw the value in what was being offered to help them address this challenge proactively. The recurring questions were about how a humanities PhD project could gain traction outside the academy, more generally about what was seen as the poor fit between the academic humanities and the non-academic world, about the time IDP Design might take away from students' research and writing, and about how IDP Design might be viewed—not favourably—by faculty members.

## Relevant artifacts

The only artifact used to support the presentation to students was the **IDP Design journey map**, included as Figure 1 above.

## Refinement

In future, as the program becomes more established, it will be important to leverage additional **channels to advertise** the opportunity, and also to develop a **transparent process for selecting** among the applicants. Both of these should be developed iteratively, to improve reach and refine selection processes from one cohort to the next.

Furthermore, it would be valuable to start collecting systematically the questions raised by students; these can inform **revisions to the presentation materials** and populate an **FAQ section** on an eventual webpage advertising the program.

Finally, there was no onboarding process between recruitment and the skills & interests workshop. It might be valuable to **integrate an onboarding** session (perhaps an asynchronous one, pre-recorded and viewed as homework) or even just an onboarding email that provides key pieces of information, an overall roadmap and key next steps. Getting students to document their journeys as they unfold is something that the facilitator and PI were aiming to promote; the onboarding phase would be the appropriate moment to introduce this “journey log” and orient the students towards how and when to use it.

## Skills & interests workshop

### Approach

Initially, student skills and interests were going to be explored through a series of 1-on-1 interviews between Chantelle Thauvette and the individual students, with the facilitator participating as an observer. However, due to time constraints, we needed to shift towards a new model. Accordingly, the facilitator decided to gather the students all together and conduct this discovery exercise in the format of a group workshop.

## Preparation

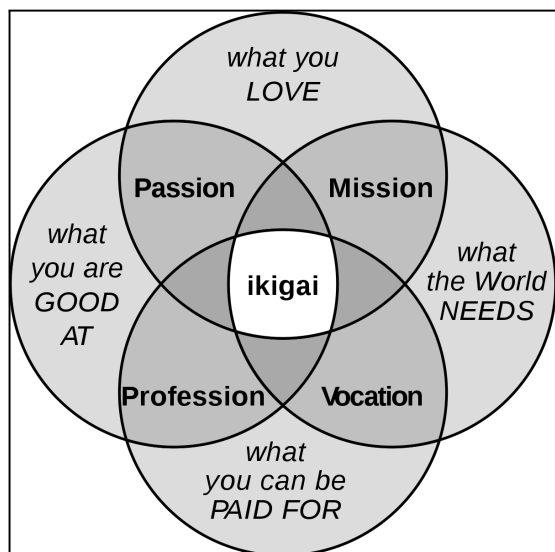
The **draft questions** for the workshop were the following:

- Research topic
  - How would you describe your research to my 5-year-old daughter?
  - If she asked you why that's important, what would you say?
  - What experiences in your life got you interested in this topic in the first place?
- Subject areas
  - What are the issues out there in the world that really inspire you?
  - What are the issues out there in the world that make your blood boil?
- Skills
  - What activities (in your work, or elsewhere) can you lose yourself in, where time just flies by and you're completely absorbed?
  - What do friends and/or family seek your input for? What do they mention as your skills and/or passions?

Students were provided with the questions ahead of time, so that they could reflect before arriving and wouldn't need to jump in completely "cold."

The **feedback** received from selected "friends of the program" was generally positive. The respondents were surprised by the questions, having assumed that there would be more questions about jobs or sectors, or about the mechanics of how they would seek out employment. This feedback was potentially a double-edged sword: on the one hand, the fact that it was fresh and surprising could indicate that this novel direction could be powerful in unearthing possibilities that previous approaches had not; on the other hand, the "distance" from "career talk" might indicate that the approach had drifted too far from its ultimate objectives. Only time would tell.

The **Ikigai concept** was used as the "glue" to hold the various pieces together from the questions above. Working through the questions one by one, and then slotting them into the Ikigai map, would help to highlight overlaps as well as gaps. Notably, there were no questions formulated to probe the students' career intentions; this reflects the underlying hypothesis that students would benefit from support in *formulating* those intentions, rather than taking it for granted as a prerequisite that they would *already know* where they wanted to end up.



**Figure 2: Ikigai**

*Attribution: Nimbosa (derived from works in the PUBLIC DOMAIN by Dennis Bodor and Emmy van Deurzen)*

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*Link: <https://commons.wikimedia.org/wiki/File:Ikigai-EN.svg>*

## Execution

Overall, the **workshop was very successful**. The students found it **challenging (and fun!)** to try to articulate their research and its importance in terms simple enough to be understood by a young child. **Separating the discussion by themes** (research focus, contemporary issues of interest, and skills) was very helpful to get students to slow down and think through the Ikigai concept piece-by-piece.

One participant noted that he had attempted to use the Ikigai concept previously to guide some similar reflections, but ultimately found that it wasn't very successful. In this case, however, he found that the separation by categories forced him to slow down and think more deeply about each dimension individually—working from the outside in rather than jumping immediately to the centre of the diagram where the circles intersect. Additionally, the Ikigai concept supports the adoption of an external perspective: articulating what the world wants from us, for example, rather than what we want to bring to the world (whether it asks for it or not!).

All of the participants noted that the **Ikigai concept was very powerful** as a structure for integrating the individual pieces that they developed in the brainstorming sections at the beginning of the activity. They also appreciated that the “work” circle was something that they would fill out through the course of the program, acknowledging that they had only very undeveloped ideas about what should go there.

As the workshop flew by very quickly, the completion of the student's Mural boards was assigned as homework, along with the preparation of a 250-word summary of the students' major takeaways; these summaries, along with the Mural board and a recording of the

workshop, were supplied to Chantelle Thauvette to guide her work in highlighting TRaCE narratives that might resonate particularly well with each student.

## Relevant artifacts

The main artifacts from this stage were the question list (provided above) and the Mural template for the activity (provided in appendix below). The students were also asked to produce a synthesis of their reflections arising from the session.

## Refinement

There were a few challenges in the workshop, and addressing those would substantially increase the value created during this stage of the process.

1. The level of skill in working with Mural was highly variable. Those who knew the platform and were able to engage with it smoothly had an obviously higher-quality experience in the workshop. A short “**Mural how-to**” would be valuable to include in order to establish a baseline of comfort with the platform.
2. The workshop was scheduled for only 90 minutes; this was too short for the work required in the session. Ideally, the workshop should probably be booked for **150–180 minutes**. If working with larger groups, it might also be valuable to leverage breakout rooms and plenary sessions to ensure that group discussion can be lively and engaged without needing to increase the time commitment further still.
3. The level of engagement was also not very high at the beginning of the session. As students were speaking, it was difficult to get them to write down their insights, and the facilitator ended up also acting as a scribe. This is suboptimal, as deeper engagement from the students will help them to get more value from the experience and take greater ownership ultimately of what is produced. A solution to this might be to **assign students to scribe for each other**.
4. There were also some challenges around the subject matter.
  - a. Students found it challenging to **empathize with the perspective of the young child**, and thus to find language that was as plain and accessible as is needed to engage with community members and professional practitioners—which is not to infantilize such folks, of course, but rather a simple acknowledgement that the jargon used in academia is highly idiosyncratic. (And yes, the author is aware of the irony of writing such sentences in such ways.) Good facilitation is likely always going to be part of the answer here. Additional techniques could include watching a video together of a 5-year old describing (e.g.) the plot of a well known film, which can be both entertaining and helpful for generating a more empathetic response.
  - b. For the “current events” category of questions, some of the responses remained quite academic and idiosyncratic. It might be helpful to **prompt students to connect their answer back to a story in the popular press**, which will help them to ensure that they are properly anchored outside the academic sphere.



- c. For the skills question, it could be helpful to prompt students to articulate not only what they are good at and enjoy, but also **what it is about those skills that makes it enjoyable** to practice them.
5. For the Ikigai activity, the students greatly enjoyed the suspense of the “grand reveal,” which was accomplished by having them develop their initial responses towards the left of the mural and then revealing the Ikigai diagram only later when we panned to the right. However, it was challenging for the students to move their stickies from one activity area to the next. A primer on Mural skills, noted above, may solve this challenge. The facilitator might also schedule a short session break just before moving to the Ikigai portion of the workshop, and **use that break time to copy the stickies themselves into an area that is more user-friendly** for the students.
6. Finally, the 250-word summaries were short and to the point, but the students ended up reverting back to quite a bit of academic jargon and framing. It could be helpful in future to **provide some structure and an example of a “good synthesis”** to the students, to communicate more explicitly what is expected of them.

## Matching students to TRaCE narratives

### Approach

In this first iteration of IDP Design, the matching from students' interests & strengths to narratives in the TRaCE library was **done manually**—in this case, **by Dr. Chantelle Thauvette** (Graduate Career Advisor at McGill University) who has an in-depth knowledge of the contents of the library.

### Preparation

The materials provided to Dr. Thauvette included the full Mural board from the skills & interests workshop, the 90-minute recording of the session, as well as the summaries prepared by the students.

### Execution

Based on these inputs, Dr. Thauvette **suggested 3–4 TRaCE alumni** to each student.

Additionally, the **students were encouraged to browse the TRaCE library** themselves, to get a sense of the range of options available and to see whether additional narratives (beyond the handpicked suggestions) might be of interest to them. They did so, and ultimately one of the students ended up engaging with an additional alumna who was not among the shortlisted suggestions coming from Dr. Thauvette.

#### Program drop-off

One of the students in the initial cohort dropped off from the IDP Design pilot at this stage. An exit interview was conducted to understand more. Here are the relevant insights:

- The student had initially hoped to connect with one or more professionals coming from

a similar background to his, and working outside of academia.

- After the first workshop, the student was feeling positive about his experience to date with IDP Design, and had found the activity helpful for mapping his skills and interests.
- In engaging with TRaCE narratives, he had hoped to find someone who could help to illuminate a path for how to take his research and bring it into contact with tangible problems to have an impact on relevant communities.
- What he ended up finding, however, was that most narratives he encountered indicated that similar alumni were either still in academia or in a “closely adjacent” space. This was true of both the shortlisted narratives as well as those that he discovered through his own extensive browsing.
- As a result, he felt that continuing in the pilot would have been an unwise use of his time: based on what he found in the narratives, he was already anticipating that meeting with these alumni would not yield the insights or opportunities that he had been seeking through IDP Design.

Two **key insights** emerged from this interview:

1. It’s important to redouble efforts to engage and **document the narratives of alumni who have gone on into non-academic roles**, in order to have a strong feeder system into IDP Design (and for other reasons connected to the purposes of TRaCE).
2. Students also lacked some clarity on the purpose of the IDP Design program and how its structure would contribute to this purpose being fulfilled. Accordingly, a well populated **FAQ page and a stronger onboarding process** would help to give students a clearer picture of the program going in, and to help them stay better oriented during the course of the program itself.

Finally, the student expressed his disappointment that IDP Design did not work out for him. He valued his engagement in the program, underlined the importance of what the program aims to do, and wished us well on our journeys.

## Relevant artifacts

The main output of this stage was the TRaCE alumni suggestions for the students.

Additionally, Dr. Thauvette prepared some suggestions for the students to guide them in their self-directed exploration of the TRaCE library. They are reported here.

### **Strategies for browsing the TRaCE library (accessible [here](#) and [here](#)), written by Dr. Chantelle Thauvette**

- The key goal of TRaCE McGill was to answer the related questions: Where do PhDs go after they graduate and what paths do they take to get there? The interviews and narratives are structured to answer those questions.
- This means functionally that when you browse the narratives page, the career origin point (PhD program and research area) and present day point (current job title and industry) are usually visible. You will always see the person’s job title next to their name, and you will see the PhD program they were in in the short description that previews the narrative.
- The easiest way to browse is to think through either a point of connection at the origin (similar research backgrounds or topics) or at the destination (interesting career, or job title I’m unfamiliar with, or working somewhere interesting)

- For this project, I would recommend that students avoid the temptation to browse by origin and look instead at destination. Using what I had, I could generally only make matches based on origin but since their destination is still taking shape I would recommend they browse with that frame of mind and look for people who know something about a direction they would like to explore.
- For something a bit more concrete: they might start by looking for Job titles they aren't familiar with. If they're not sure what that person does, click in and find out more.

## Refinement

This **manual approach to matching is not scalable** to large cohorts, but for a small pilot cohort, it was serviceable. In order to prepare for scaling, some work under the umbrella of TRaCE includes natural language processing of the narratives, to identify some **themes/archetypes that will improve discoverability** by users themselves. This improvement to the narrative library will position students to do more self-service at this stage of the process, reducing the workload required to match students with potential mentors, and ultimately contributing to the scalability of the program.

Dr. Thauvette also provided some interesting feedback on the matching process, which suggests other improvements that could be considered down the road—perhaps more so for TRaCE than for IDP Design specifically!

- She noted that the narrative structures were not well suited to the needs of the exercise. “I had rich information on the student side to work with, but it didn’t connect with the information I had on the mentors. I tried my best, but the points of connection were often superficial (both share a research interest in a place or time period, both want/wanted to solve issues related to the brain, etc.)” Flowing from this observation, one might identify **structural changes to the way that narratives are captured and summarized**, which could provide a richer basis for matching.
- On a related note, the **skills & interests workshop** invited the students to articulate their priorities in a certain way; these **activities could also be adjusted** to facilitate a clearer connection between the students’ interests and those of the alumni documented in the library. Acknowledging that the author of the present report is also the one who built the workshop activities—and is therefore biased on the matter—it seems that the skills & interests workshop was useful in getting students to think about themselves in new ways, and that this creativity was useful in helping them to consider new spaces in which their research might be relevant. For that reason, adjustments to the skills & interests workshop can indeed help to bring the outputs into closer and more obvious alignment with the narratives in the TRaCE library, but improving this “degree of fit” should be careful not to undermine the very substantial value of getting students to think differently about themselves, their research and their career trajectories.
- Dr. Thauvette mentioned as well that it was difficult to assess the **quality of a match**. In particular, she flagged **two separate dimensions**: the thematic overlap between the focus of a TRaCE alumni and that of the student, and the willingness/aptitude of the alumni to act in a mentorship capacity. Of note, willingness/aptitude of the alumni to act

in a mentorship capacity is actually not captured at all in the library; this is information that only Dr. Thauvette and others personally connected to the TRaCE project have access to, through their own personal interactions with the alumni. It may be worthwhile to **include a module on “mentorship capacity”** in the TRaCE interview protocol.

## Team engagement

### Approach

Building on the list of suggested TRaCE alumni, supplied by Dr. Thauvette, the team-engagement stage of IDP Design aims to recruit additional participants to join the student in the design workshops (which form the next stage of the program). Each student had **three team members to recruit**, and each of those team members required an introductory **email**, a **meeting** (involving the student, the TRaCE PI and the IDP Design facilitator), and then time to reflect on the request and reach a **decision**. Engaging the alumni mentors, professional practice representatives and lived experience representatives<sup>1</sup> was a very time-intensive and lengthy process.

### Preparation

The students were very inspired by the narratives that they found (both those that were shortlisted and those additional entries that they discovered on their own through self-directed browsing). They seemed to **identify quite quickly and smoothly** those TRaCE alumni that they wanted to speak with directly, to learn more above and beyond what they had discovered in the narrative case studies. From there, the TRaCE PI and the IDP Design facilitator helped the students to connect with the TRaCE alumni, clarifying the purpose of the program and the “ask” of the mentor.

### Execution

The TRaCE alumni were **very responsive and very enthusiastic** about participating in the program. The initial email had a **response rate of 100%**, and most **responded within 1–2 days** of receiving the message. (Only one alumna took longer, and this was due to the message being delivered to an inbox that is infrequently monitored.)

This level of engagement speaks to the strong connections that were formed through the TRaCE program, and the relationships that were developed with the TRaCE PI. **Individual relationships are key** to smooth, effective and rapid recruitment for these positions. Formal programs such as TRaCE are extremely valuable supplements, useful in seeding and supporting relationships—but ultimately it is the relationships that did the heavy lifting in this pilot project, and relationship-building tools should not be viewed as replacements for relationship-building.

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<sup>1</sup> Following feedback received from pilot participants, there is ongoing discussion about renaming the “lived experience representative” role to “community representative.”

Once presented with the opportunity to participate, the mentors and representatives were all very **receptive to join the students' teams**. They had questions about the time commitment and their role in the activity, but none needed much convincing to join.

In terms of the **order of engagement**, the TRaCE alumni were the first Team members engaged. These alumni had very helpful suggestions about whom to engage as potential professional practice representatives. Once these two team members were engaged and confirmed, the PI and the facilitator re-engaged the students' thesis advisors—to update them on progress, to gauge their interest in joining various workshops, and to solicit suggestions for lived experience representatives. The lived experience representatives were the most difficult to identify and the last to be engaged.

To give a sense of **timelines**:

- The first emails were sent to prospective TRaCE mentors in late March.
- The alumni met with the students in April.
- The students finalized which alumni they wanted to invite to their teams in late April.
- The alumni were confirmed as mentors in late/April early May.
- The professional practice representatives were engaged and confirmed in early May.
- The students' thesis advisors were updated in mid May.
- The lived experience representatives (who are much more difficult to identify!) were identified and confirmed in late May.
- Scheduling the design sessions was launched in early June
- Scheduling was finalized in mid June
- The first design sessions took place in late June

All told, that is a **3-month period** to account for between the students providing responses about the TRaCE narratives and beginning the first design workshops.

## Relevant artifacts

Given the early stage of maturity of the IDP Design program, some **boilerplate “marketing” materials** needed to be prepared in order to engage the TRaCE alumni. These included (all provided in the appendix to this report):

- a program intro deck
- a short overview video
- email templates

Additionally, even with only two students (and therefore 6 team members, in total) it became **cumbersome to keep track** of meetings, which team member was in which stage of the recruitment funnel, etc. Accordingly, a simple **recruitment monitor** was developed to track progress in a centralized fashion. This tool will be only more valuable with additional students and also should there be more team members who ultimately decline the invitation (and therefore more potential team members to engage).

## Refinement

Because the “marketing” resources were being used for the first time, and being actively iterated as they were put into use, the **TRaCE PI and the IDP facilitator played a very active role** in engaging and onboarding the mentors. In future, it would be beneficial to put the students in a more foregrounded, leadership role here—both because it would increase their sense of agency and ownership, and because decentralizing this work would reduce the administrative burden on university faculty and staff who support program delivery.

As the marketing materials and the engagement monitor become more mature, this kind of decentralization will become more feasible. Nevertheless, **a faculty or staff member will need to maintain visibility** on the process to ensure that progress is being made. They can also **provide clarity to students** about the recruitment process, the supporting materials that the students can use, and the timelines that the students must maintain in order to keep pace with the overall progress of the program.

There were also some observations that warrant further reflection here. First, due to the direction of their research, one student was lined up to engage with a **vulnerable community**, whereas another student proposed to engage a community with important **cultural differences** from the academic setting in which the project was being conducted. While IDP Design is certainly flexible enough to accommodate such engagement, the program itself could benefit from being complemented with additional resources (and perhaps even training) to **support the students in engaging such communities**, to promote responsible research and position the students for success. This could include support for students who may need to interact with university research ethics boards, even coming from disciplines where passing through REB processes is less common.

## Opportunity mapping

### Approach

Once the Team was recruited, the next stage of the program involved convening them to undertake a collaborative exercise to **develop a project framing and map out initial opportunities**. These opportunity mapping activities were conducted in a **workshop format**. In one case, the workshop was entirely virtual; in the other case, those based in Montreal gathered onsite at McGill while those elsewhere around the world joined virtually (via Google Meets). The workshops were conducted using **whiteboarding activities** on the Mural platform.

### Preparation

Given the number of participants, the differences in time zones, and the vacation schedules of Team members during the summer, **scheduling was a challenge**. The facilitator offered 14 different time slots (using the Doodle platform)—this initially seemed like a lot of options, but in the end there was still some reshuffling needed to align everyone’s schedules.

Beyond scheduling and technical aspects, the major piece of preparation was the design and development of the **Mural activities**. These Mural activities form a core element of the IDP Design process, and while future iterations of the program can continue to iterate on them and increase their value, ultimately having a solid draft to start from is a cornerstone of the future of IDP Design.

The workshop **involved the following activities**:

- A review of the IDP Design overarching process, and of the session's agenda
- A context-setting from the student
- An icebreaker activity for the various participants to get to know each other
- A "Visions of 2035" activity, inviting participants to brainstorm positive futures that they see the student's doctoral work could contribute to
- A consolidating and voting activity, helping participants to integrate their various ideas for the student to indicate the directions they find resonate most with them
- A "Day in the life" exercise, in which participants create a "journey map" of the vision of 2035—what would the major milestones of an average day look like for someone living in that positive reality twelve years from now?
- A "Barriers and enablers" exercise, which helps participants to identify why this positive future is not producing itself spontaneously already, and where the openings are for an intervention to catalyze that future.

Additionally, in light of feedback gained through the earlier stages of the program, the facilitator prepared a short "**bootcamp**" activity, which Team members could undertake asynchronously ahead of the workshop in order to familiarize themselves with the Mural platform.

## Execution

Overall, the opportunity-mapping workshops were successful. In both cases, the students and their Teams were able to generate a **rich and substantive description of an ideal future** and **identify opportunities for interventions** to promote that future coming about. Furthermore, the members of the **Teams really came together**, forming strong bonds and aligning themselves behind the student, to support the student's project, their desire to create positive societal impact, and their efforts to forge a career path for themselves post-PhD.

### *Vision of 2035*

The **brainstorming** portion of the Vision of 2035 exercise started off a bit slowly. In the first iteration of this workshop (i.e.: with the first student), there was initially some **confusion** about whether this was a vision for the *student's life* in 2035 or a vision for the *societal change* in 2035 that the student might bring about through their work (the latter being the intended purpose of the exercise). Resisting his natural inclinations for order and control, the facilitator did not redirect participants' attention but rather allowed a thousand flowers to bloom.

When it came time to **integrate the various ideas** that the participants had generated, categorization helped to reveal that some ideas were addressing "where and how" questions

about the student and “why” questions that were more oriented towards societal impact. Discussion highlighted that the “where and how” were only relevant in reference to the “why”—that is, the jobs that the student might get and the approaches that he might take were instrumental questions relative to the intrinsically important “why” questions of what the student might *achieve*. This put the activity back on track to achieve its aims.

The insight also proved useful in providing a **more effective activity introduction** for the next student’s workshop. It proved useful to give some additional structure to the activity, clarifying that the participants should generate ideas of the format “X person has Y experience” (in 2035) and that the person in question should be a community member rather than the student. Importantly, one of the Team members also **provided a high-quality example** (which emerged organically in the icebreaker, and which the facilitator prompted her to repeat.) This introduction led to more directed discussions, in the second iteration of this workshop.

The integration activity was meant to be followed by a **voting** exercise, for participants to provide some quantitative input to the student about where they saw the most potential. Ultimately, however, the **qualitative discussions** were very rich, and the facilitator opted to forego a vote.

This activity was followed by a short break. During this time, the students were asked to synthesize the results of the Visions exercise into a **consolidated vision statement**. In both cases, students demonstrated some **hesitancy** to consolidate around a single direction, likely as a result of worrying about **path dependencies**—should they take a wrong turn here, how might that cascade into problems further down the road?

It was helpful to **reassure the students** in two ways.

- First, they are not obligated to actually follow the path that they lay out in the workshops. Their doctoral research can draw upon the ideas and directions of the workshops to the extent that they see fit, but they won’t be forced in any way to implement decisions made in these workshops. They remain the masters of their own destinies.
- Second, even if the direction around which they consolidate in the workshop is ultimately off the mark from the direction in which they decide to take their research, the reflections and considerations they receive from their Team, through the subsequent activities, will continue to have value for them.

### ***A day in the life***

The Day in the life exercise starts with the student **defining a starting point and an endpoint** (e.g.: getting dressed to go to work, and kicking off one’s shoes upon arriving home), and then the whole Team **filling in the steps in between**. Each Team member takes a turn generating an additional step, and then it is up to the Team as a whole to decide where that step should live (e.g.: does drinking coffee happen before leaving the house or upon arrival at the office). Occasionally, someone might generate a step that feels very important that should be placed before the defined start or after the defined end. This is fine; it is up to the group to decide how to handle the suggestion.



This activity **played out very differently in the workshops of the two students** participating in the pilot. In **one case**, the Team took to the activity very quickly (understanding both its purpose and the process of undertaking it), and they executed it with fluency and little need for active facilitation. The journey map built through this process was very clear, concrete, and directed. In the **other case**, the Team struggled to understand the purpose or the process, and in fact the whole exercise ended up playing out through the facilitator’s dialogue with (primarily) the student. The resulting journey map felt “loose,” lacking concrete detail around the wheres, whens and hows—which may also have been influenced by the differences in the two students’ projects (the more concrete journey map flowed from a project focused on specific forms of architecture, and therefore to the spaces and activities that are typical there).

### ***Barriers & enablers***

The Barriers & Enablers activity was meant to centre around a **quantitative vote**, where Team members could indicate where they thought the most important bottlenecks and openings were to be found. **Mural stickies** were also provided to give the participants the opportunity to provide some **qualitative feedback**.

Ultimately, the **voting exercise delivered relatively little value**, and the time spent explaining and executing that activity reduced the amount of time available for qualitative inputs and discussion. In the second student’s workshop, the voting was scrapped, opening up more space for a rich conversation to emerge. It also left time to **give each participant a moment** or two to synthesize and **share their main takeaways** from the Barriers & enablers conversation, which ultimately delivered far greater “summary” value than a quantitative vote.

### **Relevant artifacts**

The artifacts that went into the workshop included **email templates**, the **Mural activities** as well as the asynchronous **bootcamp**. Coming out of the session, students were also assigned some **synthesis and feedback homework**; email templates were created for this as well. These materials are all provided in the appendix.

### **Refinement**

The Mural activities (Visions of 2035, A Day in the Life) were very unfamiliar to the participants, and a **stronger, tighter onboarding to these activities** likely would have improved the participant experience and also increased the value of the outcomes. For example, it would be helpful to clarify ahead of time that the “actor” at issue in the Visions exercise is a community member—not the student nor any of the other workshop participants.

Along similar lines, in the more “generative” activities, it would be useful to **set expectations** about the length, quality and number of ideas generated. For example, in the Visions exercise, the objective is to generate approximately a dozen ideas of one-to-two sentences each, not one-to-two ideas of a dozen sentences each.

The **pictures of failure/success activity**, included in the icebreaker, produced rather boring outputs. That is to say, most of the participants gave similar answers to one another, and they also defined success and failure as just the opposites of each other. For example, if success was for the student to identify viable career paths, failure was the student not identifying any viable career paths. Such outcomes were of **limited value**, though they did manage to produce some **alignment** between the participants, who had this opportunity to recognize that everyone was there for similar reasons.

Finally, on the technology front, it is advantageous to have **two screens** when participating remotely. This allows the participant to have the videoconference on one screen and the Mural activities on the other, so that they can interact with each other as well as with the activities, without the need to toggle back and forth. There is a bit of a catch-22 here, though, which is that the participants who are the most tech savvy are the ones who are BOTH more likely to have two screens AND the least encumbered by toggling back and forth. It is those participants who would benefit from this setup the most who are also the least likely to have the equipment available to them.

Similarly, when it comes to offering “**scribing**” support to a participant who really struggles with the Mural platform, this support is very effective in making the workshops more accessible to them. However, the need for the participant and the scribe to talk to one another makes it very challenging to create an effective atmosphere for individual, focused brainstorming. In brief, once the participant and the scribe start to speak, other participants in the room (in the case where any participants are co-located) will naturally be drawn into that conversation. When offering scribing in a co-located setup, it would be advisable to have a separate physical space where the participant and their scribe can work without disturbing the rest of the group.

## Catalyst ideation

### Approach

With the opportunities mapped out in the previous session, and the student having done some synthesis as homework, the next step in the program was catalyst ideation, which involves **generating a long list** of potential interventions, **integrating** them into a single concept, then **assessing the strengths and weaknesses** of that concept, and finally **identifying risks** to be monitored. As with the opportunity mapping, these activities were conducted in a **workshop format**. In both cases, the workshops were of a **hybrid** format, with some participants co-located in the same physical location and others joining virtually. The workshops were conducted using **whiteboarding activities** on the Mural platform.

### Preparation

**Scheduling** was conducted using Doodle (and in fact scheduling for the opportunity mapping and the catalyst ideation was undertaken simultaneously with a single poll).

Between the opportunity-mapping and catalyst-ideation sessions, the students also had **synthesis work** to do, consolidating ideas from the previous session to generate key inputs for the catalyst ideation. The primary components required from the students were a finalized Vision of 2035 statement along with an indication of which “enabler” (from the Day in the Life activity) the student wanted to explore in more detail as the site for intervention. The formula for these inputs is: "How might we use [the selected enabler] to achieve [the vision for 2035]?"

Once again, there were also **Mural activities** to develop, with the following major components:

- A review of the IDP Design overarching process, and of the session’s agenda
- An opportunity for the student to present and clarify their synthesized vision as well as their “how might we” statement
- A “Crazy 8s” activity, in which participants were given 8 minutes to generate 8 very preliminary ideas about how that enabler might be leveraged to bring about the vision. Participants then shared their 8 ideas back to the group
- A consolidating activity, where participants chose the elements that resonated most with them from the dozens of ideas that they had heard. Participants were given a structure for this, articulating their integrated concept by answering the questions who/what/where/when/how (not why—the vision of 2035 is the answer to that question already)
- Participants were then given a break while the student integrated those inputs once again into a single intervention concept.
- Upon their return, the participants had a “rose, thorn, bud” activity to help them provided structured feedback about the strengths and weaknesses of the concept
- A pre-mortem, to elucidate potential risks for monitoring
- A review of the “image of success/failure” from the icebreaker in the previous session, giving participants a moment to reflect on the activities and what progress they had made towards those outcomes
- A wrap-up, with next steps for the student and note of thanks to all participants

## Execution

In both cases, the workshops were once again quite successful. The outputs of the catalyst ideation workshops were very rich, **substantive ideas** for taking the students’ research into non-academic contexts, with the **potential for societal impact**. The students and their Team members also had the felt sense that the workshops had opened up **new avenues for impactful work**.

On the “periphery” of the formal activities, there were also many ideas raised about **potential opportunities**: conferences to attend, individuals to be introduced to, programs to apply for, and so forth. These were highlighted as being very valuable, and (at least anecdotally) professional transitions to new career trajectories often pass through these “serendipitous paths” of connection. It was very valuable that these openings came to the surface during the activities. In this author’s experience, this kind of organic emergence of opportunities through “substantive”

discussions about impactful projects is entirely sufficient and extremely fruitful (in addition to never feeling forced).

Nevertheless, it is worth reflecting on whether it might be worthwhile to add some formal activities/time to **generate ideas for such openings**. One low-touch approach could be to include a piece of homework for the Team after the ideation workshop, asking them to list the top 3 people they know who would be interested in learning more about the project—people to whom they could introduce the student, in order to continue “seeding” the development of the student’s network.

### ***Crazy 8s***

The Crazy 8s activity unfolded well, generating a long list of potential intervention concepts. The participants **initially found the prospect daunting** of generating so many ideas in such a short time (and in fact the facilitator offered to give them 10 minutes total for 8 ideas), but ultimately they surprised themselves in realizing that **they were more than up to the task!**

In one case, two participants were not able to attend the synchronous session, and so they **submitted their ideas ahead of time** along with short walkthrough videos. In the other case, most participants (all but one) decided to do the Crazy 8s exercise **on paper**, then paste a photo of their paper on the Mural (instead of doing the activity natively in Mural). Both approaches were very successful. Crazy 8s is a very permissive activity, delivering a wide array of ideas even under a wide range of permutations.

**Integration** is always the challenge. Providing the who/what/where/when/how structure was extremely useful for this purpose. This approach was generated spontaneously during the session, and it would be **useful to create a space explicitly on the Mural** for this activity.

### ***Rose, thorn, bud***

The rose, thorn, bud activity also unfolded well. The floral analogy makes it **quite intuitive** for participants to pick up. Having the colour-coded icons also makes it **visually evident** at a glance to see where the Teams see the strengths, weaknesses and untapped potential of the concept. The only **drawback** is that there is no visual cue to indicate which icon goes with whose feedback. Perhaps a small numeral could be superimposed on top of each icon (e.g.: the TRaCE Mentor has all the icons labeled #1), so that the numeral could provide the link back to the source of the feedback.

### ***Pre-mortem***

One student and their Team undertook the pre-mortem activity, whereas the other student’s workshop session was running long causing the pre-mortem activity to be skipped over. The activity itself is **a bit convoluted to explain**—imagining oneself into the more distant future, and then “rewinding the tape” to a moment that is actually in the quite near future—but nevertheless the **participants picked it up well**. An example is always helpful, of course, and the narrative / story-telling element of the activity makes it both easier to understand as well as quite fun.

In the case of the student whose Team *did* manage to undertake this activity, the results were interesting and **highlighted substantial risks** to monitor while executing the project. Despite enjoying the exercise, participants were **not entirely clear on the purpose** of the pre-mortem; there is therefore **room to improve the onboarding** to the activity, and also to clarify how its outputs feed into other steps in the IDP Design process (notably in the roadmapping session, where risk monitoring is taken up again explicitly).

### Session “closing”

The session closed with a revisiting of the hopes and fears participants had expressed in opening the opportunity-mapping session. One piece of **feedback** received from the students and the Teams (while reviewing their inputs from the ice breaker) is that they envisioned success involving professional trajectories and downstream impact. In giving this feedback, the participants openly acknowledged that these outcomes are longer term, and that it will not be clear whether the workshops have contributed to this outcome for potentially years to come.

**One way to respond** to this feedback might be to clarify upfront how the generation of this kind of impact project creates the opportunities to interact with the people and institutions from which professional opportunities ultimately spring. This could be nicely paired with the homework for Team members to generate a list of “next people to speak with,” which creates a concrete set of additional next steps to continue bringing the project forward, specifically with those people who might be able to highlight/create professional openings down the road.

Finally, the sessions closed with the Team expressing how much they had enjoyed the experience and found it fruitful. It provided **opportunities for the participants** to make some new connections, strengthen some existing ones, provide support and guidance to a student—and, of note, to come to realizations about their own spheres of work.

### Relevant artifacts

Once again, the major artifacts were **email templates** and the **Mural activities**. Students again were assigned homework, synthesizing outputs of the opportunity-mapping and catalyst-ideation sessions ahead of the roadmapping workshop (which was the final step in this pilot test of IDP Design). These materials are all provided in the appendix.

### Refinement

There is room to improve the **Mural architecture** for the activities.

- First, the Crazy 8s activity lends itself very well to **paper-based execution**. The tactile experience really enriches the activity for everyone, and it is especially valuable for those participants who struggle with the Mural interface. (The digital-first approach does however offer the opportunity for participants to drop in images, GIFs and icons, which can enrich the activity.) In order to make the activity more amenable to paper-based contributions, the **spatial layout on Mural** should be adjusted to better mirror 4x2 layout for each participant, rather than a single row of 8 slots.

- Second, after the Crazy 8s activity, an **“integration” step** proved to be more valuable than a voting step. That is, rather than asking each participant to indicate which of the ideas they liked the most, they were prompted to generate one new idea building on the concepts already presented. Some structure was helpful to make that integration more fluid—participants were instructed to articulate their new concept by clarifying who, what, where, when and how the intervention would be deployed. This brought a level of granularity to the exercise that supported the students when it was time for them to integrate the inputs themselves and propose a path forward, leading into the rose, thorn and bud exercise.
- Finally, as noted above about the rose, thorn, bud, it would be useful to be able to **link back which icons related to whose input**. A simple solution here would be to **add a numeral to each icon**, so that (for example) the TRaCE mentor would have all her icons labeled with the numeral 1, and therefore (once displaced) any icon bearing a 1 could be related back to the TRaCE mentor’s inputs.

In terms of the overall choreography of activities for the session, there were two further refinements that might be worth considering.

- During the course of the ideation workshops (and others, but especially during ideation), the teams spontaneously identified a number of **potential network connections** for the student to explore: people with whom to speak, conferences at which to present, programs to which to apply, etc. Given the value of these leads, it might be worth **creating an explicit brainstorming activity** to prompt teams to generate networking ideas.
- The ideation workshop is also quite long, and only one team had the time needed to undertake the **pre-mortem activity**. In future, it may be worth cutting out this activity and **providing it as a supplementary resource** for the students to undertake later in their journeys (after the roadmapping workshop, once they begin wider engagement beyond their IDP Design team). This would create additional space for the network brainstorming activity, in addition to just creating more space for the other ideation activities to breathe rather than be rushed.

## Roadmapping

### Approach

The opportunities mapped out, potential catalysts ideated and a consolidated intervention idea presented & refined, the next step of the IDP Design process aimed to **shift from crafting the project towards bringing it to life**. This is the objective of the roadmapping stage.

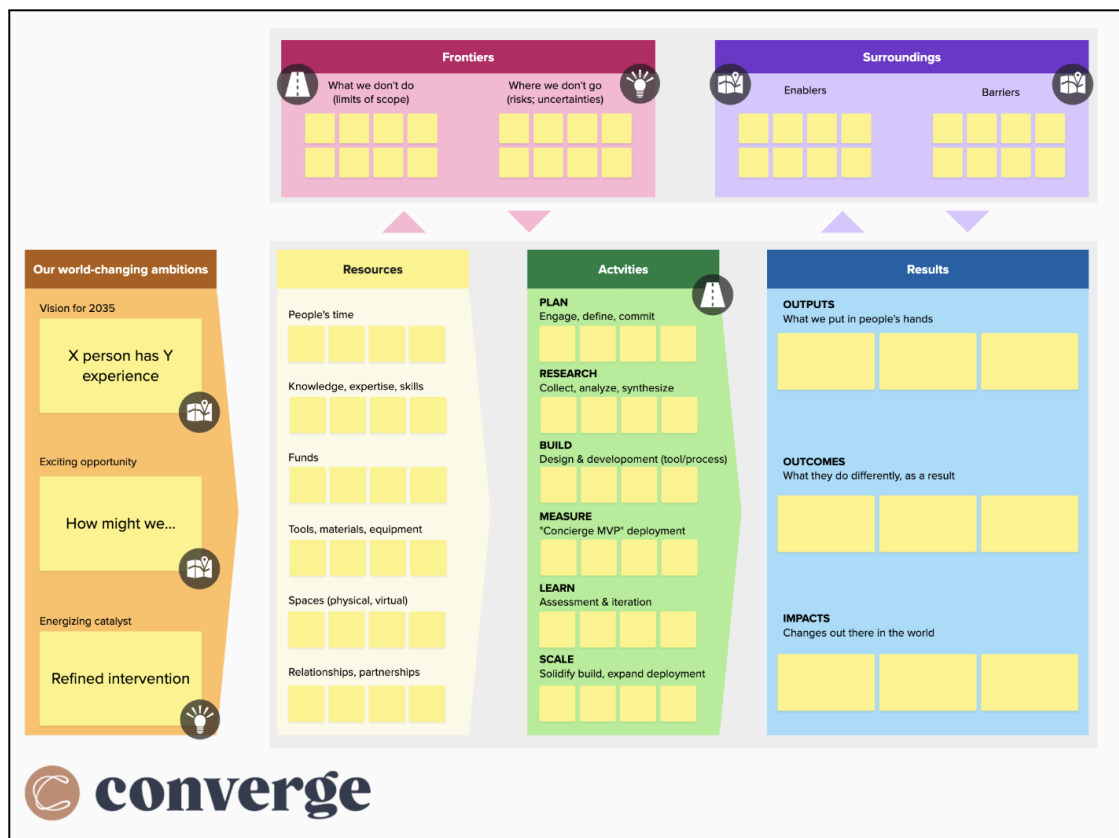
The roadmapping involved several **steps**. First, the students integrated all the work to date into a logic model (more details on that below), articulating their project in a single, at-a-glance visual. This was accomplished as homework between sessions, and students were explicitly instructed to leave the Activities section blank—between the Resources with which to work on one side, and the Results to be achieved on the other.

The **primary objectives** of the roadmapping workshop were to **articulate the activities** needed to transform those resources into the desired results, and to **define the boundaries of scope** (what will and will not be done in the project).

The roadmapping sessions were **conducted in-person**, one using the Mural platform and the other executing the same activities in a paper-based format (with markers and post-its on the wall).

## Preparation

Following the catalyst-ideation sessions, the students once again had **synthesis work** to do. They were instructed to integrate the outputs of the previous two workshops into a **logic model** (see the figure below). Logic models are common in many non-profit and government settings, and in many ways they are similar to a business model canvas that one might more readily find in a for-profit setting.



The logic model also provided a legend to clarify for students where various inputs should be drawn from.



The opportunity mapping session



The catalyst ideation session



The roadmapping session

The **Resources and Results** sections had no icons, because these were inputs that the students **needed to generate de novo** as part of their homework. Once the logic models were drafted, students recorded a **short walkthrough video** on Loom. The facilitators<sup>2</sup> and the TRaCE PI provided **feedback** on the logic models, which the students then integrated ahead of the roadmapping session.

The **Mural activities** for the roadmapping session included the following major components:

- A review of the logic model (only the changes implemented since the student received feedback; this was to save time while also providing a short “warmup” for the session)
- An activity to generate the major milestones of the project, at a very high level (“30 000 feet”). The milestones were broken down into 6 buckets: plan, research, build, measure, learn, scale.
- A timelining exercise, to place those milestones on a calendar.
- Then a deeper dive into the first milestone, to generate specific, concrete activities needed to reach that milestone (the “50 foot” view)
- An exercise to highlight the first 3 steps to take, to get the ball rolling right away.
- A review of the overall scope, stepping back to look at the full suite of steps and identify what should live within the “container” of the PhD program, what would be better to push to a subsequent career step, etc.
- A revisiting of the logic model, to see what updates might be warranted, given the roadmapping session and now with a holistic view of the project overall.
- A wrap-up, with next steps for the student and note of thanks.

## Execution

The students noted that the logic model was very helpful—this was the first time that they saw the entire arc of the IDP Design journey really fit together into one coherent whole. They found the **logic model exercise challenging at first**, as the tool itself was unfamiliar to them, but once they got the hang of it, they **found it extremely useful**. The **feedback** provided was also very helpful in getting them on the right track with their logic model.

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<sup>2</sup> For the roadmapping session, a second facilitator with expertise in implementation science was invited to participate.



Both students **found the “Major milestones” exercise confusing at first**. There are two reasons for this. The first reason is that the steps provided (plan, research, build, learn, iterate, scale) are **not totally discrete** in addition to being **iterative**. That is to say, a given activity could just as easily fit into the end of the build phase as the beginning of the learn phase. Similarly, building a project proposal could go through all 6 stages, just as the project itself could. For these reasons, there are many possible conceptions of what to map these steps onto. And this leads to the second reason. Because multiple interpretations are possible, having **multiple facilitators in the room** can increase confusion if they do not both guide the student towards adopting a single interpretation to frame the remainder of the activity. For as long as the student is seeking a single framing to guide their thinking, they feel disoriented. **Once they landed on a single framing**, they felt much clearer on the activity and how to execute it to generate valuable insights for their work. In particular it is helpful to **clarify as early as possible the “institutional overlay” of the project onto the doctoral program** (that is to say, to clarify where the dissertation writing, submission, revision and defense will land within these milestones).

The timelining exercise, laying out the **milestones on a calendar at 30 000 feet**, was extremely useful for students. This exercise was where they really started to see the **connection** between **activities**, key **deadlines** (such as thesis submission, funding applications, etc.) and **scoping** (what would be included in the doctoral journey, what would fall later on). This activity prompted a lot of **“free play of ideas”**—testing out different **permutations**, especially around scoping and what will be within vs. after the PhD.

From there, diving into the **first milestone at the 50-foot level** went very **differently than planned**. Initially, the Mural board was set up to go through a second round of ideation and consolidation activities. In practice, this level of granularity was not needed in order to reach the key insight, which was about **what to start doing right away**. The initial steps to take seemed to **emerge quite organically** when the student’s focus was drawn to the first milestone, without needing the “supporting infrastructure” of the Mural activities designed.

Similarly, **revisiting the scope** went very **differently than planned**. An explicit activity set had been laid out on Mural to help students differentiate essential elements from “nice-to-haves,” and to clarify what would be within scope of the project vs. what would land later. In practice, the conversation about “nice-to-haves” took a very different form: in particular, as various **permutations** were being discussed for post-PhD work, **what was considered essential vs. nice to have** really depended on whether the track post-PhD would be an academic track (in which case publication becomes higher value and building scaling capacity might be secondary) or for instance a for-profit track (in which case scaling capacity might be higher value with publication being secondary).

Similarly, the question of what was **in scope vs. out of scope** was **not a discrete activity** that took place after the 30 000-foot view had been articulated. Rather, as the milestones were being placed on the calendar view, **different permutations** were explored of what to fit into the doctoral program, what to leave for afterwards (be that a postdoc or some other professional role), and how to pivot from the one to the other. This led to **conclusions** framed not as “in scope vs. out of scope” but rather as “in the PhD vs. in the next stage.”

Finally, there was no **revisiting of the logic model** within the session. Rather, this revisiting was **assigned as homework** to the students post-session.

The homework assigned after the session included:

- Revisiting the logic model
- Setting a time with the supervisor to introduce them to the logic model, roadmap and scope, requesting feedback about the proposed plan
- Revisiting the Ikigai exercise, specifically with an eye to filling in details about “where to work” (which was not touched in the initial skills & interests workshop)

## Relevant artifacts

The **email templates** and the **Mural activities** for this stage are all provided in the appendix.

## Refinement

- The activities in the roadmapping session unfolded very differently than planned, though ultimately the sessions achieved their objectives, even if in a different way than initially expected. The Mural templates should be adjust to reflect the realities articulated above, notably around **simplifying the 50-foot view** and **conducting the scoping exercises along the way** of the 30 000-foot view rather than separately. It is recommended to **leave the “revisiting the logic model” activity**; if there is time for this, it would be high-value.
- For the **milestones activity**, it was noted that the students struggled with confusion until the conversation landed on a single “dominant” framing. Concretely, the facilitator(s) can help to **achieve this a-ha moment faster** by taking a more active role in consolidating ideas and doing so as they are being generated, as opposed to taking a more phased approach to brainstorming first and then team-led consolidation afterwards.
- Finally, due to vacations during the summer months, neither student’s supervisor was available to participate in their roadmapping session. The sessions **would be much more valuable with the student’s supervisor participating**, as they have both insight into the specifics of the doctoral program in their department (and thus the flexibilities possible) and can guide students in directions that they feel the thesis committee would accept in the student’s effort to balance an academic course of study with community deployment as part of the research effort. Such approaches to research are already widely embraced in some fields, but for the humanities at least these approaches are still new and thus may encounter resistance, being deemed “not academic enough.”

## Conclusion

### Overall observations

**TRaCE Transborder** seeks to transform the challenges that humanities PhDs face into global opportunities, and following this pilot test, **IDP Design now offers one validated blueprint** for catalyzing such opportunities. The program's structure seeks to leverage community (including notably the experience of humanities PhD alumni, whose stories are catalogued in the TRaCE narrative libraries) and the tools of design thinking to help current PhD students to improve their outcomes along several dimensions:

- **Time to completion**  
IDP Design helps students build a concrete plan for bringing their project life, and positions students and their supervisors to collaborate effectively in managing towards the accomplishment of that plan, adapting as needed along the way. This more systematic and actionable project monitoring and management approach (compared to more laissez-faire and/or more accountability-focused monitoring) can help to improve time to completion.
- **Poor employment prospects**  
IDP Design helps students to connect with a network of contacts outside of academia, to engage that network in substantive ways in formulating (and later executing upon) their thesis project plans, and to create value for communities and professional practitioners. In these ways, the program creates opportunities for students to be exposed to professional opportunities post-PhD, and to demonstrate their competencies to individuals who can vouch for those competencies with credibility.
- **Protracted transition to career paths**  
IDP Design gives students concrete, tangible approaches for formulating a project plan that exposes them to career opportunities. While professional transitions (especially those across sectors) rely heavily on serendipity, IDP Design's structure puts students into ecosystems where serendipitous encounters are more frequent. Even the design workshops themselves *are* such opportunities, in addition to the future opportunities the groundwork for which is laid in the workshops.
- **Low social impact**  
Through the involvement of professional practitioners and community members in the co-design of the doctoral student's research project, IDP Design creates fertile ground for impactful projects to take root, grow and bloom.

The **results of this pilot test** have demonstrated that the machinery of IDP Design can be very effective in generating opportunities for students as described above.

## Limitations of the findings

Some **limitations** of the pilot should be highlighted and discussed. Some are obvious, such as the small pool of students; the collection of only qualitative, narrative, self-reported results; and the short timeframe for observing outcomes. These are notable limitations, and should encourage readers of this report to be generally cautious in drawing inferences about the portability of these results to new contexts.

That's simply good practice in innovation—once something performs well in one small ecosystem, the reasonable next step is to test it in a slightly larger and slightly less favourable ecosystem, to see whether results can be sustained and learn about effective tweaks to apply to the program. That's not a knock against this pilot, it's just the responsible pathway to scale. The small deployment is not a shortcoming; it's what provides the evidence to warrant a bigger deployment later on, from which more robust conclusions can be drawn.

Beyond this general caution, there are several specific dimensions along which caution is warranted when drawing conclusions.

- **Self-selecting students**

The students who participated in IDP Design were self-selecting. The program was initially advertised as an opportunity to explore **non-academic (as well as academic) career paths**, which attracts a certain kind of student and does not attract another kind of student. The pilot test was successful in highlighting opportunities for the participants to deliver societal benefits and leverage the interventions to create openings for professional transition. **It remains to be seen**

- whether these “openings” will materialize into concrete opportunities for impact and career progression, and also
- what breadth of professional avenues can be highlighted through this process (e.g., whether jobs in public-sector or non-governmental organizations might emerge as openings from the program)

If IDP Design is to be deployed more widely, it must truly be as “sector agnostic” as the facilitator and the TRaCE PI have striven to make it (and have argued that it can be!). Subsequent tests will help to inform choices about how widely to apply the program and which kinds of students/projects may or may not be an ideal fit to benefit fully.

- **Upper-year PhDs**

Another limitation is that the students participating were upper-year PhD students with a **substantial portion of their research completed**, whereas the concept for IDP Design moving forward has been to orient it towards students earlier in their doctoral trajectory—notably, first-year PhDs. The pilot test has demonstrated the program's potential to generate possibilities effectively with students who are already quite advanced in their research, but it **remains to be seen** the extent to which students with less mature research projects are able to capitalize on the benefits of the program. It is hoped that starting earlier will *increase* the value of IDP Design, helping students to achieve project clarity even earlier and therefore orient even more of their work towards

the impactful and profitable projects that they design. However, it could be that students without sufficient clarity about their research ultimately struggle to formulate a clear path using the tools of IDP Design. Subsequent tests will help to inform choices about *when* in their doctoral programs to roll out IDP Design to students.

- **Amenable supervisors**

One of the criteria for selection is that students were preferred whose **supervisors are more open-minded about non-traditional career trajectories**. (In practice, this meant that students with very conservative supervisors were simply less likely to be referred to IDP Design during the recruitment phase.) Academic culture is in many ways slow to evolve, and like any culture it reacts adversely when its core tenets are challenged. One such tenet in the academic world (certainly in the humanities in North America) is that the professoriate is the most appropriate (sometimes even the *only* appropriate) professional trajectory for a doctoral candidate to consider. Should a student’s supervisor hold such conservative views, it **could make it more difficult for a student to derive full value** from IDP Design. In practice, IDP Design could be viewed as a distraction (or worse, a lack of “serious commitment to research”) by the supervisor. This is something that should be closely monitored in future tests.<sup>3</sup>

- **Socially oriented, entrepreneurial projects**

The students participating in the pilot test of IDP Design both had projects that were strongly oriented towards the social good. Neither had a notable commercial angle to them. Furthermore, both projects blossomed in very “entrepreneurial” directions during IDP Design. For projects that are more commercially oriented, IDP Design may offer lesser opportunities compared to other programs that are more focused on doctoral research commercialization (e.g.: [V1 Studio](#)). For socially oriented projects (or for students!) that are less amenable to an “entrepreneurial turn,” IDP Design may push them in directions that fit less well than a project and/or student that are better suited to living within a structured and well-defined institutional context.

- **Limited diversity**

Both of the students who completed the pilot (and even the third student who decided to cease his participation partway through) were **men**. One of them was a man of colour, and was of a minority faith in the Canadian context. The Teams were more mixed, with a better representation along dimensions of age and gender. Nevertheless, issues of **diversity, equity and inclusion should be considered in the continued evolution** of IDP Design. For example, women with young children (a group that is already disadvantaged in doctoral study) might find the additional workload more difficult to manage than some other students do. These dimensions of potentially differential impact

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<sup>3</sup> In fact, it is such a concern that it played an enormous part in the formulation of IDP Design in the first place: individual development plans (and other “skills-building” activities) are often so far out of view of supervisors that it was assumed that IDP Design could more easily “pass under the radar” there, compared with starting the program off as a revision to the core structure of how doctoral projects are formulated—which indeed it can be, given its “widest interpretation.”

should be **monitored** in future rollouts, and efforts should be made to understand what program **design revisions** could help to make IDP Design as accessible & as fair as possible to as many students as possible.

- **Concierge service**

The pilot test benefitted from a substantial amount of attention from high-quality professional resources. The cost of program delivery, on a per-student basis, was unsustainable, even with the facilitator working at a discounted rate (which he was happy to do, to support a project of this importance and potential impact!). The pilot **benefited from a level of resources that will not be sustained** as the project scales. This is not trivial; the students (as well as other Team members with doctoral experience) noted that even just the hours spent together was a huge benefit to them, and expressed the desire that they would get similar levels of attention and focus from their dissertation committees. Getting a group of smart and dedicated people together to focus on structuring an impactful project is on its own a powerful intervention—even before one considers the painstaking efforts to curate the Team and choreograph a smooth flow of activities to structure their conversations. **On the other side of the ledger**, the students were also participating in a pilot where the structure was being developed live; we were **flying the plane as we were building it**. It remains to be seen how the outcomes of IDP Design evolve once the resourcing decreases to more sustainable levels and also as the tools and materials reach maturity.

## Refinements

Speaking of maturing tools and materials, there are several overall refinements that are recommended for future iterations, refinements to the overall program rather than any specific step in the process.

- **Clarity of outcome**

Throughout the project, starting from the recruitment phase and lasting through to the final workshop, students (and other participants) noted that there was an **inconsistency in the way the desired outcome was framed**. Sometimes IDP Design was pitched as a program to promote career outcomes. Other times it was framed as focusing on creating social impact. Other times still it was characterized as a skills-development program. In a certain sense, each of these is accurate, but there was no single, clear articulation about how they fit together, which can **lead to confusion** about the program. Here is **one potential articulation**, for future consideration:

*IDP Design helps students to formulate an impactful project for bringing their research out of academia and into the wider world. Through its focus on co-creation, the formulation of this project creates natural moments for students to build network and community. (Executing the project also creates opportunities for students to develop new*

*skills.)<sup>4</sup> Ultimately, building community and delivering value generate openings for career transitions that the student can consider for their trajectory post-PhD.*

- **Clarity of overall process & timelines**

The participating students noted several times throughout the pilot program that they felt **disorientation followed by a very satisfying a-ha moment** when pieces of the puzzle fell into place and they understood the significance of the activities laid out for them.

These a-ha moments have their place: as one student noted in the interests & skills workshop, he had worked with the Ikigai concept before with little to show for it—but got a lot of value out of it in the workshop because he worked step-by-step through a process that ultimately led him *to* Ikigai rather than starting *from* there. There really is value to slowing down and thinking through something step by step, rather than leaping ahead to the end. And the open-endedness of activities can sometimes leave a space open for a sense of play, an exploratory aspect that can vanish if the “narrative tension” of the activities is collapsed because the ending has already been given away.

Nevertheless, a **better balance** can probably be struck for IDP Design; more clarity can be provided, giving the students more clarity but without completely collapsing the tension by giving everything away upfront.<sup>5</sup> In practice, for **example**, this might mean providing the logic model to the students at the beginning of the program, so that they can see along the way exactly where each workshop output will feed into the overall at-a-glance concept they’ll develop throughout their journey. Along similar lines, giving them a **complete schedule ahead of time**, with clarity about homework required and **delivery dates**, will help students to foresee and plan effectively for the work they need to put into IDP Design, as opposed to hitting them last minute with requests for pieces of work to be turned around quickly between sessions.

- **Better activity onboarding**

A connected topic is activity onboarding. The process clarity above will help participants to understand *what will be done with the outputs* that they generate through the various elements of the activity suite. Better onboarding to the activities will help participants understand *how to undertake the activities* in order to generate those outputs. These two will **reinforce each other**: the clearer the overall process explanation is, the easier it will be to explain how to execute an activity. And the clearer an activity is, the clearer it will be how the whole arc fits together. To promote scale and increase the operational and financial sustainability of IDP Design, these activity onboardings should be **recorded as video walkthroughs** and made available as companion pieces to the Mural boards.

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<sup>4</sup> The focus on skills here is perhaps the least emphasized note of IDP Design, in its current form—which shows how far the program has evolved from its initial genesis in “individual development plans.” IDPs are typically very skills-oriented and highly individualized. IDP Design is communal by nature and focuses on impact and career outcomes far more than skills.

<sup>5</sup> The facilitator and author of the present report also acknowledges an immense bias in favour of narrative tension.

## Next steps

Where to from here? The pilot test of IDP Design has already sparked conversations with several departments at McGill and several other universities, and the **program will roll out again** in the fall of 2023 and into the winter of 2024, this time with larger cohorts.

In terms of licensing, the materials from the pilot are **shared under a creative commons license**, so the intellectual property is available for anyone interested in deploying the program, **free of any licensing fees**. Anyone can deploy the program in their institution. The only responsibility to the larger community is that whatever **new materials developed on the basis of this foundation must be shared back into the commons** and published under the same license: [CC BY-SA 4.0](#). The objective is to ensure that the global research community can all contribute to and benefit from the development of IDP Design—that both its development and its benefits are communal.

In order to realize this vision, several other next steps are called for.

- **Building appetite, momentum & community**

The adoption of IDP Design post-pilot has called for substantial individual effort by Converge and the TRaCE PI to raise awareness about the program and make it available & accessible to new audiences. Such efforts must continue in order to continue building on this early momentum, and **these evangelization efforts must be joined by new adopters** of the program who believe in it and wish to see it propagate. In addition to word-of-mouth awareness, it would be beneficial to start creating some more **institutionalized mechanisms** to spread the word about IDP Design. A minimalist [IDP Design webpage](#) already exists, including the functionality for an [IDP Design newsletter](#) (though the newsletter strategy and resourcing are not yet defined). These assets could be upgraded. Additionally, **social media** could be leveraged to access wider audiences, and **academic conferences and journals** could be used as well to communicate with highly targeted audiences. Beyond spreading the word for new adoption, once a critical mass begins to form, these same channels can be used to create forums to manage communities of practice.

- **Building capacity for sustainable scaling**

Beyond appetite for uptake, the biggest barrier to sustainable scaling right now is the cost of and limited capacity for deployment. There is **not enough facilitation capacity** to serve a large number of students, and the capacity that *does* exist is **too costly**. The plan currently being explored is a **cohort-over-cohort model**. Under this plan, a student from the first cohort (e.g., in a new department that is being onboarded to IDP Design) would be selected, given training in design thinking and facilitation, and then hired as a teaching assistant/research assistant with the mandate to facilitate the design sessions for the students coming into the department the following year. Hiring a student for this role would **bring down costs** considerably (and funding for students is often easier to come by than funding for external facilitators working under consulting contracts), and



the training & experience they receive would deliver **additional professional benefits** to the facilitator-students. Because each participating department would be training a new facilitator each year, **overall delivery capacity** would increase more rapidly, compared to a company (such as Converge) hiring and training facilitators strictly for this purpose. This also **allows departments to “cross-pollinate” within their institutions**; for instance, if a history department is already running IDP Design and a literature department at the same university wishes to launch the program, the initial facilitator for the first cohort of literature PhDs could be drawn from the history department, and thereafter the literature department could recruit from its own cohorts. Finally, diversity in training and experimentation also promotes more diversity in paths taken, approaches tried, and ultimately **innovative breakthroughs** made—especially with everyone sharing back into the commons and participating in communities of practice.

- **Embedding into an ecosystem**

One of the challenges of the so-called “impact agenda” (the discourse focused on promoting the translation of academic research into societal and economic impact) has been that incentives for researchers have been slow to shift away from influencing other academics and towards creating impact and influencing practice outside of academia. Part of that challenge is also a conceptual and technical one—the pathways of impact themselves are not clear, nor are the instruments as mature for measuring the transmission of influence along those causal pathways. These challenges are ones that IDP Design must contend with; in order **for the program to flourish** in this ecosystem, it must put down deep roots and become **embedded into the nexus of programs** that determine the major flows of nutrients and energy.

For **example**, in Canada, humanities and social science doctoral students apply to **SSHRC** for funding (usually in addition to their local provincial governments). Similarly, there are funds available through **Mitacs** to support research partnerships with non-academic bodies. IDP Design becomes much more valuable to students the more that the program becomes integrated into these programs. For example, if the IDP Design process were to feed directly into “wider impact” application sections of SSHRC grant applications, this would be a major benefit to participating students—both financially and in terms of the benefits that flow from being granted such an award (previous awards being a major determinant in subsequent award decisions, which feeds runaway-advantage dynamics to those who win awards early in their careers).

To become fully **integrated** into the **research ecosystem**, IDP Design should be integrated into mechanisms for research **funding**, peer-reviewed **publication**, impact **validation**, and **more**. These are the mechanisms through which the ecosystem nourishes some research (and researchers) and allows other research (and researchers) to wither. Beyond the research ecosystem—and that’s relevant here because IDP Design is so explicitly focused on bridging academia to the wider world—there are further ecosystems to consider as well, such as spaces of (social) entrepreneurship, recruitment pipelines, and so forth.

# Appendices

## Loom walkthroughs

- [7-step program overview](#)
- [Intro for TRaCE mentors \(and other reps\)](#)
- [Overview of opportunity-mapping and catalyst-ideation workshops](#)
- [Logic model explanation + homework orientation](#)

## Recruitment monitor tool

	STUDENT NAME				
	TRaCE mentor				
	Name	Email date	Meeting date	Decision date	Outcome
Option 1	NAME	Apr 21		Apr 21	Confirmed
Option 2					
Option 3					
	Professional practice rep				
	Name	Email date	Meeting date	Decision date	Outcome
Option 1	NAME	Apr 26	May 5	May 5	Confirmed
Option 2	NAME				
Option 3					
	Lived experience rep				
	Name	Email date	Meeting date	Decision date	Outcome
Option 1	NAME				
Option 2	NAME				
Option 3	NAME				
	Thesis advisor				
	Name	Email date	Meeting date	Decision date	Outcome
	NAME	Apr 28	May 9	May 9	Confirmed

## Email templates

### 1. Inviting students to the program

**Subject line:** IDP Design | Invitation to participate

**Body text:**

Dear [name],

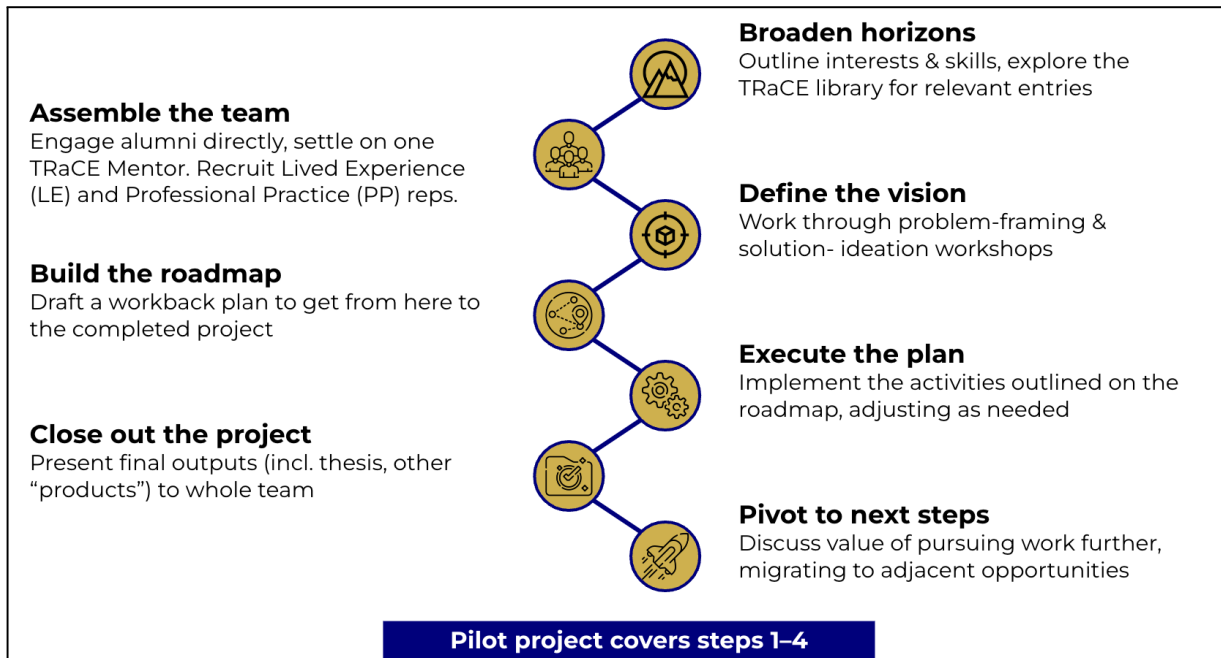
I hope this finds you doing very well. [Name of contact] told me that you might be interested in the IDP Design program that my colleague [name] and I are conducting. The program, which will run from [date] to [date], aims to enable PhD students to broaden their career horizons and also develop more creative and more socially pertinent research programs. Attached is a one-page overview and also a journey map.

It would be a pleasure to meet with you on zoom to discuss the opportunity. **Please send me your availability by end of day on [date].**

With all best,

[name]

**Attachments:**



## 2. Gathering the community of participants, scheduling first workshop

**Subject line:** IDP Design | What to expect & scheduling

**Body text:**

Hello all!

Very happy to have this whole group coming together for our program—excited to be getting this work off the ground!!

I just wanted to provide a few overall timelines for you all, so that you have an overview of the process and what to expect when.

- Skills & interests workshop  
**Please indicate your availabilities here by end of day on [date]:** [Doodle link].
- Following the workshop, you will need to prepare a 1–2 page synthesis of your results  
This should be done in the week following the workshop
- Review suggested TRaCE storylines and engage mentors  
Aiming to have mentors selected and signed on by [date]
- Engage potential Lived Experience reps and Professional Practice reps  
Aiming to have these folks signed on by [date]
- Conduct opportunity-mapping and catalyst-ideation workshops  
These will run through the months of [date and date]
- Roadmapping sessions, to translate your catalysts into actionable plans  
These will happen in [month]

Please let me know if you have any questions. Speak soon!

[name]

**Attachments:**

- <none>

## 3. Confirming first workshop, sneak peak at questions

**Subject line:** IDP Design | Workshop on <Date> & Prep

**Body text:**

Hello everyone!

We have just confirmed the time—the workshop will run from [hour to hour] on [date]. Calendar invitation following shortly.

Ahead of time, I wanted to share some of the questions that we'll be working through; **see below**. I suggest that you look over them ahead of time, and feel free to jot down ideas if they come to mind. We'll have time to flesh out answers in the session, though—no need to complete the exercise ahead of time, just begin reflecting.

Thanks!

[name]

#### Workshop questions:

- Research topic
  - How would you describe your research to my 5-year-old daughter?
  - If she asked you why that's important, what would you say?
  - What experiences in your life got you interested in this topic in the first place?
- Subject areas
  - What are the issues out there in the world that really inspire you?
  - What are the issues out there in the world that make your blood boil?
- Skills
  - What activities (in your work, or elsewhere) can you lose yourself in, where time just flies by and you're completely absorbed?
  - What do friends and/or family seek your input for? What do they mention as your skills and/or passions?

#### **Attachments:**

- <none>

## 4. Following up after the skills & interests workshop

**Subject line:** IDP Design | Workshop Follow Up

#### **Body text:**

Hi everyone!

Thanks for a great and very interesting session on [date]. Below, please find some follow-up items for this week. If you have any questions or comments, please send them my way!

Thanks, and speak soon,

[name]

Follow-up

- If you didn't **complete the exercises** during the session (or just wanted to continue refining your work), please finish those this week. Here is the Mural link: [link]. A PDF is also attached.
- When you have finished the Mural exercise, **please produce a 250-word summary and email it to the whole group by end of day on [date]**.
- With these summaries in hand, we will recommend a shortlist of alumni that you might be interested in connecting with.

#### **Attachments:**

- PDF export of skills & interests workshop

## 5. Sending students their alumni recommendations

**Subject line:** IDP Design | TRaCE narrative recommendations

#### **Body text:**

Hello everybody!

As promised, **please find here the TRaCE storylines** suggested for you, based on the exercises we conducted in our workshop session. [see below]

We also recommend that you **browse the databases** and see what else your searches turn up. Here are the relevant links:

- <http://tracephd.com/category/narrative/>
- <http://tracemcgill.com/narratives/>

After reviewing the suggestions and browsing more widely—**please let us know by end of day on [date]**: Which of these people would you be interested in speaking with directly?

Once we've got your selections (and you can select as many as you like!) we'll get wheels turning on our side to introduce you. Recall that it is from among this list of TRaCE alumni that you will select your TRaCE mentor, who will be a member of your design team for the opportunity-mapping and catalyst-ideation workshops later on.

If you have any questions, please let me know! Talk soon,

Brooke

#### Recommendations

- Student 1
  - Mentor 1
  - Mentor 2
  - Mentor 3

**Attachments:**

- <none>

## 6. Providing students with context, for engaging TRaCE alumni

**Subject line:** IDP Design | Engaging you TRaCE connections**Body text:**

Hi [students],

I wanted to provide some **clarity ahead of your initial conversations with the TRaCE alumni**. Your first meeting is really an opportunity for you to get to know the alumni you've connected with, learn about their story, find some inspiration for yourselves, and consider whether you'd like to "recruit" them to your team. You don't need to make a decision on the spot, and you don't need to introduce the wider program or get them to commit.

**After your initial meetings**, you can then decide which of the alumni you'd like to ask to mentor you. I can provide them additional information about the program and the time commitment being requested, so that they can make an informed decision. But all that comes later.

Below, you can also find a few **questions to guide your reflections** about the potential fit with the alumni you speak with.

Let me know if you have any questions!

[name]

**Reflection questions**

- In what ways did this alumni's experiences help me to identify new possibilities for my own professional pathway?
- What experiences/character traits/interpersonal style would make this alumni a good mentor for my IDP Design team?
- What experiences/character traits/interpersonal style would make this alumni a poor mentor for my IDP Design team?
- On a scale from 1 (not at all energized) to 10 (very energized), how interested am I in having this mentor join my IDP Design team?
- Were there additional contacts that the alumni mentioned that might be valuable additions to my IDP Design team (as Professional Practice or Lived Experience reps)?

**Attachments:**

- <none>

## 7. Connecting student with TRaCE Mentor

**Subject line:** IDP Design | Introductions!

**Body text:**

Dear [mentor],

As previously discussed, it's a pleasure to introduce you to [student], who is participating in the IDP Design program.

[student]—you already know something about [mentor]'s career.

[mentor]—[student] is a PhD candidate in [department]. S/He is undertaking work on [topic]. I will leave the rest of the introductory conversation in your good hands.

[student], please go ahead and set up a meeting for you and [mentor] over the next week or two. Please CC me so that I can make sure that we're progressing according to schedule.

Of course, should you want a refresher, you can find a brief introduction to the program on the IDP Design website (<https://www.mcgill.ca/trace/idp-individual-development-plan>). And feel free to reach out directly to me should you have any questions.

All very best,

[name]

**Attachments:**

- <none>

## 8. Getting student choice for TRaCE Mentor

**Subject line:** IDP Design | Engaging you TRaCE connections

**Body text:**

Hi [student],

Now that you've had a chance to speak with the potential mentors that you shortlisted, it's time to make a decision! **Please let me know by end of day on [date]** which alumni you have chosen. We can then send along a formal request to confirm their participation, and continue with the process of identifying the remaining members for your Team.

Looking forward to hearing back from you,

[name]

**Attachments:**



- <none>

## 9. Updating student's thesis supervisor

**Subject line:** IDP Design | Update on <Student Name> & mtg request

**Body text:**

Dear [supervisor],

I hope this finds you doing very well.

I'm writing to you today to provide an update on the **progress of [student] through the IDP Design program.**

- [student] is progressing well through the program.
- S/He has recruited [mentor] as his/her TRaCE alumni Mentor.
- Together with [mentor], [student] is now working to recruit the Professional Practice rep and Lived Experience rep to join their design team.

It would be great if [student] and I could meet with you to do a proper update and to discuss the steps that will follow. **Please let me know by end of day on [date]** when you might be available for a meeting over the next couple of weeks.

With all best,

[name]

**Attachments:**

- <none>

## 10. Engaging professional practice/lived experience reps

**Subject line:** IDP Design | Referral from [contact] & program context

**Body text:**

Dear [name],

I hope this finds you doing very well. [contact] suggested that I get in touch with you about a program called IDP Design that she/he is taking part in and that I might invite you also to join. **Please review the program details & student context below.**

If this seems like something you might be interested in, it would be a pleasure to set up a meeting where I can tell you more about the project and to answer any questions that you might have. **Please let me know by the end of the week**, and (if you are interested) please send your availability to speak in the next week or two.

With many thanks and all best,

[name]

#### Program details:

The program is called IDP (Individual Development Plan) Design. IDPs are now a common feature of graduate student support across universities in North America, the UK and beyond. They offer professionalization workshops and invite graduate students to think about possible career paths.

IDP Design, which is part of the larger [TRaCE Transborder](#) project, is being created to help PhD students do their career planning far better than they are able to do with present IDPs. IDP Design was founded by Dr. Brooke Struck (of Converge) and Prof. Paul Yachnin (McGill).

[IDP Design](#) aims to do a better job helping doctoral students move forward with their research and their career planning by putting students together with design teams. The design teams include the mentor, a Professional Practice person, and a Lived Experience person.

#### Student context:

The student in this case is [name], who is doing his/her PhD in [department] at [university] with a research interest in [topic]. His design team will work with him to begin to identify the central problem that he wants to address and works also to think together about possible solutions. The design work can be transformative for the student as well as the communities touched by their research topic.

Your work on [topic] makes you a terrific person to take part in design work with [student]. The time commitment on your part would be 6 hours (in two 3-hour blocks), and we would aim to have those two sessions completed between [date] and [date].

#### **Attachments:**

- <none>

## 11. Managing progress of Team engagement

**Subject line:** IDP Design | Update on Team confirmations

#### **Body text:**

Dear [students],

I hope that you are doing well. We have been working the phones (actually, the email servers) trying to move things forward in terms of recruiting your Teams—TRaCE mentors, professional practice reps, lived experience reps.

I wanted to send you this email with some **updates** as well as **next steps/action items for you**. Please see below and **get back to us by [date]**.

I'm also emailing this to you together (rather than separately) so that you can get some insight into how things are unfolding in each other's "lanes," rather than having each of you journey separately.

Looking forward to speaking with you soon,

[name]

### Updates & action items

#### Student 1

- TRaCE mentor  
[update] + **[action item] w/deadline**
- Thesis supervisor  
[update] + **[action item] w/deadline**
- Professional practice rep  
[update] + **[action item] w/deadline**; e.g.:  
*[Mentor] suggested [name]. We should meet with him this week to explain the program and gauge his interest. Would you be available to join at [time] on [date]? **Please let me know by end of day on [date]**.*
- Lived experience rep  
[update] + **[action item] w/deadline**

#### Student 2

- Etc.

#### **Attachments:**

- <none>

## 12. Scheduling design sessions

**Subject line:** IDP Design | Scheduling design workshops

#### **Body text:**

Hello, members of [student]'s IDP Design Team!

Please review the following **doodle** <link to poll> and select all dates that you are available. This is **due by the end of the day on <Date>** .

Once we hear back from you we'll follow up with scheduling details and for a **"tech check"** ahead of time to ensure that everyone has what they need for the sessions.

Please let us know if you have any questions.

**Attachments:**

- <none>

### 13. Scheduling roadmapping session

**Subject line:** IDP Design | Roadmapping Session

**Body text:**

Hi [student]!

I am reaching out today to **schedule the roadmapping session** that is to take place after your two workshop meetings in <month>. I have created another **doodle poll** for this. Please review the poll and select all the times that you are **available**, could **make work**, or a **hard no**.

This will make it easier to schedule in everyone's calendar. You will need 3 hours to set aside for this block.

Please do not hesitate to contact me if you have questions on the time or if you need any acceptances! Please indicate your availability **by the EOD on [date]**.

Have a wonderful week!

[name]

**Attachments:**

- <none>

### 14. Following up after opportunity mapping

**Subject line:** IDP Design | Opportunity-Mapping Follow Up

**Body text:**

Hi [student],

I'm really happy with how the opportunity mapping session went! How about you? (For your reference, a PDF of the Mural is attached.)

As follow-up from the session, and in preparation for the catalyst ideation session we've got coming up on [date], you'll need to write up a short synthesis of our last session. See the guiding prompts below.

Please have the synthesized Vision and How-Might-We statements ready and **submit them to me at least 24 hours ahead of the next session (which is on [date])**, so that it can be integrated into the Mural.

If you have any questions, please don't hesitate to reach out.

[name]

Some prompts. to guide your synthesis:

- For the Visions of 2035,
  - Which "Vision of 2035" resonated most strongly with you? What was it about them that resonated?
  - Were there some that resonated less, and why?
  - **Please formulate** a Vision of 2035 that you'd like to work with moving forward. This should be a single sentence!
- For the "Day in the life" exercise,
  - How did the journey mapping activity help you to get a more concrete sense of the lived experience of those you're trying to help, through your research?
  - Which of the barriers to the Vision do you find most interesting to explore? And/or which is most connected to your research?
  - Which of the enablers or opportunities do you find most viable as a pathway for your work to create impact? (In particular: consider where new knowledge might be particularly impactful, as research is well suited to catalyzing such opportunities.)
- Bringing together the vision activity and the barriers/enablers activity, **please formulate** your How-Might-We statement. The formula for this is: "How might we use [the selected enabler] to achieve [the vision for 2035]?" This is especially important, as it will **feed directly into the activities of the next workshop**.

In terms of length, one paragraph on each of the sub-bullets above would be really useful, so a total of about 1–1.5 pages. No need to overdo it, especially with all the other work you've got going on!

**Attachments:**

- PDF export of [student]'s opportunity mapping Mural

## 15. Following up after catalyst ideation

**Subject line:** IDP Design | Catalyst-Ideation Follow Up

**Body text:**

Hi [student],

I hope this email finds you well. I wanted to touch base following the catalyst ideation and get us ready for the next session: roadmapping.

Below, I've provided some instructions for the **prep work required for the next session**; see below. If you have any questions, please don't hesitate to reach out! For your reference, the Mural outputs are attached in PDF.

Thanks for your engaged participation in the session, and I look forward to our roadmapping workshop coming up soon!

Sincerely,

[name]

Prep work:

- Please integrate the outputs of the opportunity-mapping and catalyst-ideation workshops into a **logic model**, which can serve as a guiding framework for your project moving forward!
  - Here's a [Loom](#) explaining the logic model and how to do this exercise. Note that the Activities section and Limits of scope can be left blank for now; and that only the Resources and the Results sections are net new (everything else being a synthesis of previous work).
  - I've set up a Mural board here [\[link\]](#) where you can do the work
- Once you've built the logic model, please record a short **Loom walkthrough** of your own, talking us through your work. Please email me the link when it's ready, **no later than end-of-day on [date]**. If you won't be able to meet that deadline, please let me know when would be feasible for you.
- From there, we'll take a look at what you've produced and provide some feedback ahead of the roadmapping session.
- Please **update your logic model** based on the feedback, and record a fresh Loom explaining your adjustments. Then we'll be ready to hit the ground running in our roadmapping workshop! This should be finished **24 hours ahead of the roadmapping session**, so that I have time to put your inputs into the workshop Mural.

**Attachments:**

[CC BY-SA 4.0](#)

- PDF export of [student]'s catalyst ideation Mural

## 16. Thanking Team members

**Subject line:** IDP Design | THANK YOU!

**Body text:**

Hi [mentor, LE rep, PP rep],

**Thank you very much** for participating in the workshops that we've done together over the past few weeks. Your creativity, energy and care have really brought a lot to [student]'s project.

In terms of **what comes next for [student]**, s/he and I will be running a roadmapping session, basically moving from the idea that we generated together towards a workplan of concrete steps to take to bring the project to life. From there, it'll be up to [student] to take the project forward with his/her supervisor.

And **what about you?**

1. If you're **interested in continuing** to stay updated (or even involved in a more substantive capacity, should you so desire), I invite you to reach out to [student] directly. As s/he builds the roadmap, it'll be useful for him/her to consider how various folks want to engage, and start planning for how to do that.
2. If you have any **feedback on IDP Design**, that would be really useful as we continue to refine the program and scale it up. We welcome feedback on any part of the process, including the initial conversations to get you involved, the opportunity-mapping and catalyst-ideation workshops, communication throughout—even this thank you message! Anything you'd like to share would be greatly appreciated. For that purpose, we'll give you a feedback format you're now familiar with.
  - a. Rose: what works well in the IDP Design process?
  - b. Thorn: what doesn't work well?
  - c. Bud: what shows promise (or what could we add)?
3. Finally, if you're **interested in joining future student teams** for IDP Design, please let me know so that we can add you to our contact list.

Once again, thanks very much, and I hope that we have a chance to collaborate again in the future!

Sincerely,

[name]

**Attachments:**

- <none>

## 17. Wrapping up, after roadmapping

**Subject line:** IDP Design | Wrap up

**Body text:**

Dear [student],

Thanks for a great roadmapping session! In this message, I wanted to share the **final set of instructions** and request a **last round of feedback** about the IDP Design program. You can find those below, along with **links to all of your Murals** (for ease of reference).

I also wanted to express **my sincere thanks**. You have been an amazing participant in the IDP Design program. Your project has lots of potential for social impact (in addition to being fascinating), your energy and enthusiasm throughout our work together have been inspiring, and your determination to stick with the program through these past few months has been exemplary. Thank you very much for all of it, and I wish you the very best of luck as you move into these new chapters of your research and your careers. (And I'd love to hear about how things unfold with these initiatives that we've been architecting together over the last few months—please feel free to share updates!!)

Wishing you all the best,

[name]

### Final IDP Design instructions

1. First off, now that you've started building out your roadmap, I would encourage you to go back and **revisit your logic model** (and other elements of the roadmapping Mural).
  1. I encourage you to synthesize the roadmapping session to fill out the Activities section as well as the limits of scope.
  2. I would also encourage you to go back over the other sections (especially the Resources section) and update them based on the roadmapping work. (*E.g., now that you've articulated some key steps for putting your plan into motion, are there additional resources you've realized that you need?*)
  3. I would also encourage you to solidify the timelines and milestones for the 30 000-foot journey.
  4. If you would like feedback on any of this, feel free to package it up in a Loom for my review. :)
2. I would also encourage you to **book a time with your supervisor** (and any other "early champions" that you're already actively engaged with) to present your updated logic model + 30 000-foot journey, to get their feedback.



3. Once these materials are finalized, they're a useful thing to print out and **put on your wall**, use as your desktop background, etc.—to keep you focused on what you need to be accomplishing week to week, in order to stay on track with the larger vision.
4. Finally, I'd encourage you to **go back to where it all started**—the Ikigai exercise [link]. This is primarily an exercise for self-understanding, less concretely connected to specific steps to take in order to accomplish your project and more oriented towards getting a deeper understanding of yourself and the "sweet spots" to focus on as your career and your wider life continue to unfold!
  1. In the initial workshop, we focused on what you love, what you're great at, and what the world needs. You should be in a position to update those now.
  2. Additionally, you should be able to start filling in some content for the "what you can get paid for" section. Here are three questions that I'd encourage you to answer, in a few stickies each.
    1. Where can this kind of work get done
    2. How can I access those spaces
    3. How can this work get funded
  3. With each of the outer circles now filled out, you should be able to trace some interesting overlaps and see where those real "sweet spots" are where a very fulfilling career can be built!
  4. If you decide to undertake this exercise, I'd love to see a Loom synthesizing your realizations!

### Last round of feedback

1. Once again, if you could do a rose/thorn/bud exercise to provide some **feedback on the roadmapping session**, that would be very useful.
2. Similarly, if you could do a rose/thorn/bud exercise **reflecting on IDP Design as a whole**—and how it relates back to your initial expectations from the program—this would be incredibly valuable.
3. Finally, if you want to provide a **testimonial** that we could include on the IDP Design website, in a newsletter, etc., that would help us out in advertising the program to future cohorts of students and to other universities/faculties/departments that are considering taking on the program.

### Mural links

- Ikigai workshop [link]
- Opportunity mapping [link]
- Catalyst ideation [link]
- Logic model [link]
- Roadmapping [link]

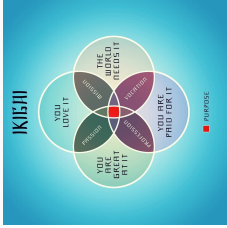
**Attachments:**

- PDF of roadmapping Mural

## Mural templates

- Skills & interests workshop
- Bootcamp
- Opportunity framing workshop
- Catalyst ideation workshop
- Logic model template
- Roadmapping workshop

*(PDF exports below)*

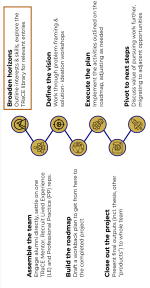


# TODAY'S AGENDA: Catalyst ideation

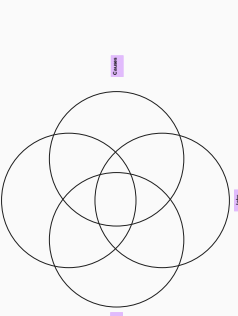
- Discuss your research (in new ways!)
- Talk about what subjects motivate you
- Figure out what you're good at
- Start drawing overlaps
- Next steps



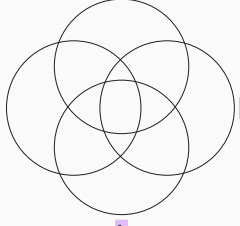
### IDP Design journey overall



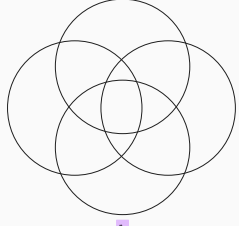
Recall: pilot covers steps 1-4



Alex



Fawaz



Phil

Phil

Fawaz

Alex

Your research topic

Subject matters

Skills



### IDP Design journey overall



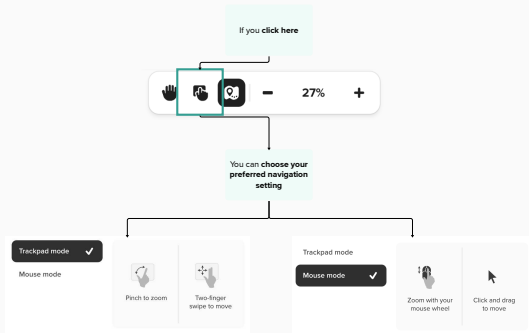
Recall: pilot covers steps 1-4

# TODAY'S AGENDA: Catalyst ideation

- Discuss your research (in new ways!)
- Talk about what subjects motivate you
- Figure out what you're good at
- Start drawing overlaps
- Next steps

# Getting around the Mural board

## Scrolling & zooming



## Navigation hacks

You can follow your facilitator (or anyone else) by clicking on their icon in the center bottom, e.g. —

Follow Visible Linkage

And you can navigate using the Agenda using the tool in the top right corner, e.g. —

Outline

- Getting around th...
- Navigation hacks

## When to Zoom vs. resize

If you need to read something small—**Zoom in!**

If one object is too small relative to other objects around it—then **resize it** (by clicking on it and then dragging a corner!)

Just Yes Not

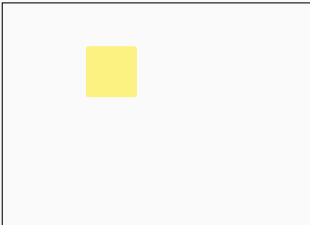
Locking? (Prevention only) Only locked content can be moved around the board. Locked content can be edited, but not moved.

# Adding and manipulating content

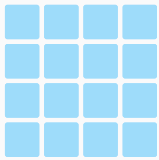
**Fun fact:** Stickies are 99% of Mural

Create a sticky by double-clicking in empty space on the Mural (where you want the sticky to appear)

Click and hold on a sticky—so you can drag it (e.g.: move your new sticky into the box below!)



**Pro tip:** you can click and hold to put a box around multiple items to select them—then move them as a group!



Double-click inside a sticky to edit the text on it—try putting your name in the one below

Hi! Nice to meet you.  
My name is: Paul

10 mins

20 mins

30 mins

40 mins

50 mins

60 mins

70 mins

80 mins

90 mins

100 mins

110 mins

120 mins

130 mins

140 mins

150 mins

160 mins

170 mins

180 mins

190 mins

200 mins

210 mins

220 mins

230 mins

240 mins



View anchor  
Linda Watt  
You will receive this  
invitation via email  
and you will be able to  
cancel it at any time

LinkedIn  
E.g. LinkedIn profile

**Visions of 2035**

PHD student

TRICE mentor

Professional practitioner

Community member

What are the biggest barriers? (Please be specific and quantitative)

Start

Encounters adversity

Discovery transformation

New reality

End

Why aren't 2035 like the status quo?

And what are our stability?

IPD Design journey overall

TODAY'S AGENDA: Opportunity mapping

**Introductions**

PHD student

Professional practitioner

Community member

TRICE mentor

IPD Design Facilitator

TRICE program lead

What are the biggest barriers? (Please be specific and quantitative)

Start

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End

Why aren't 2035 like the status quo?

And what are our stability?

IPD Design journey overall

TODAY'S AGENDA: Opportunity mapping

**IPD Design journey overall**

TODAY'S AGENDA: Opportunity mapping

Start

Encounters adversity

Discovery transformation

New reality

End

Why aren't 2035 like the status quo?

And what are our stability?

IPD Design journey overall

TODAY'S AGENDA: Opportunity mapping

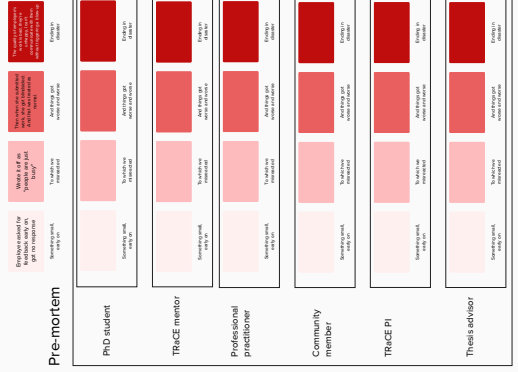
Student any task, burning question for the group?



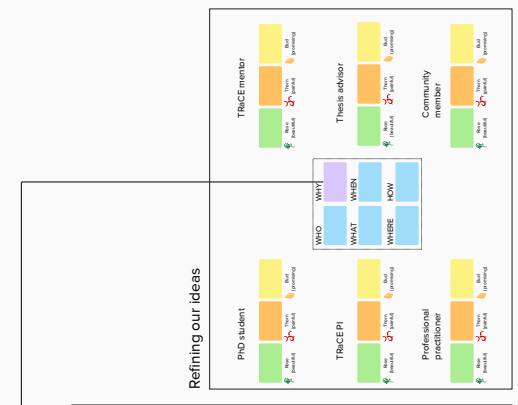
TODAY'S AGENDA  
Opportunity mapping



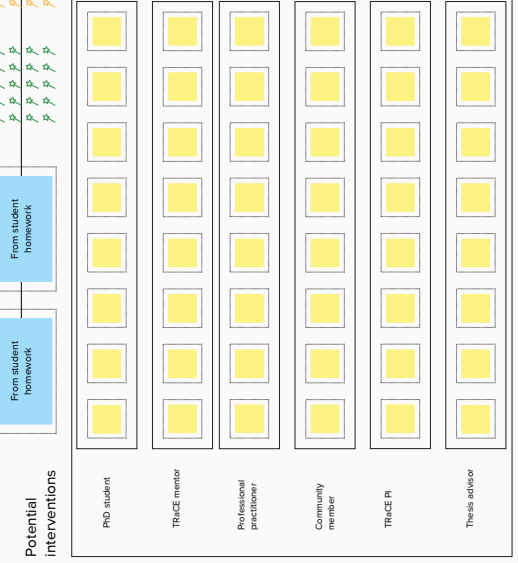
Pre-mortem



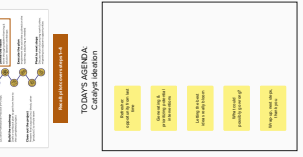
Refining our ideas



Potential interventions



TODAY'S AGENDA  
Catalyst creation



## Our world-changing ambitions

Vision for 2035

X person has Y experience



Exciting opportunity

How might we...



Energizing catalyst

Refined intervention



## Frontiers

What we don't do  
(limits of scope)

Where we don't go  
(risks; uncertainties)



## Surroundings

Enablers

Barriers



## Resources

People's time

Knowledge, expertise, skills

Funds

Tools, materials, equipment

Spaces (physical, virtual)

Relationships, partnerships

## Activities

### PLAN

Engage, define, commit

### RESEARCH

Collect, analyze, synthesize

### BUILD

Design & development (tool/process)

### MEASURE

"Concierge MVP" deployment

### LEARN

Assessment & iteration

### SCALE

Solidify build, expand deployment

## Results

### OUTPUTS

What we put in people's hands

### OUTCOMES

What they do differently, as a result

### IMPACTS

Changes out there in the world



**converge**

**Major Milestones**

**Timeline:** Fall, Winter, Summer, Fall, Winter, Summer, Summer

**Work in Progress**

**Deliverables:** Strategic, Tactical, Operational

**Key Milestones:** Strategic, Tactical, Operational

**Project Details:** Strategic, Tactical, Operational

**Summary:** Strategic, Tactical, Operational

**Next Steps:** Strategic, Tactical, Operational

**Conclusion:** Strategic, Tactical, Operational

**Appendix:** Strategic, Tactical, Operational

**References:** Strategic, Tactical, Operational

**Disclaimer:** Strategic, Tactical, Operational

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