

# GATHER

THE ART & SCIENCE OF EFFECTIVE CONVENING

## CORE CONCEPTS

If you share this abbreviated edition, please include a full copy of the original.

# Is Convening the Right

# TOOL for Your Work?

**CONVENING PLACES SIGNIFICANT DEMANDS** on people's time and resources, so it's important to make informed decisions about when and how to bring a group together.

As a first step, review your theory of change. Ask whether a convening is the best tool for what you're trying to achieve. Use the following set of considerations to determine if bringing together a diverse group of stakeholders for an in-person gathering of at least a half day is the best path forward.

## CONSIDERATIONS

Can the purpose/opportunity be clearly articulated?

Is the issue ripe for meaningful progress? Is there sufficient energy around the issue to "tip" to a new level of insight or action?

Can the critical stakeholders be assembled?

## ALTERNATIVES

NO

When the purpose is not clear, focus first on deeper research and framing. Be careful not to develop a too-rigid point of view. Leave space for learning from diverse perspectives in the future.

NO

When the issue is nascent, ill-defined, and/or lacking critical mass, focus on mapping the system and connecting players with shared interests.

NO

If not, consider lower-commitment modes of engagement that make it possible for key stakeholders to take part, such as short consultations, interviews, surveys, forums, wikis, or convening virtually.

CONTINUED



# Is Convening the Right TOOL for Your Work?

## CONSIDERATIONS

Does the purpose/opportunity call for collective intelligence?

Is an extended block of time essential to doing the work?

Do you have the necessary resources: 1) ample time to dedicate to the convening design and production process; 2) convening facilitation, design, and production support?

Do you need to be the primary convener?

## ALTERNATIVES

NO

When the issue you're working on can just as easily be addressed by individual actors, focus on building their capacity or make progress through 1-on-1 interactions.

NO

If the work is better suited to shorter blocks of time (less than two hours), consider convening virtually and/or adding a short, focused meeting to other events where key players will already come together.

NO

If not, hold off until you've secured ample leadership capacity and design/production team members, and consider less support-intensive alternatives for connecting the group such as conference calls, webinars, surveys, forums, or wikis.

NO

If other actors would be better positioned to take the lead role—or are already holding a related convening—explore partnerships.

# Defining Your

# PURPOSE

## Purpose: the north star of a convening's design

**IF YOU'RE LIKE** many people who take on the role of designing a convening, you may be mulling over the many practical choices ahead: Who should I invite? Who can facilitate? What venue can we reserve? Those decisions and many others are important. But if you're hoping to make your convening a catalyst for significant social impact, you'll first need to get specific about exactly what it is you're trying to achieve.

Any conference design needs to achieve at least the goals of building networks and sharing learning. Those are a good fit when your aim is to give participants a resource-rich environment for advancing their own agendas. But if you want to achieve more than that, you'll need the group to work together. There are four broad types of purposes the group can achieve: you can help them to influence, to innovate, to develop foresight, or to align and act.

Crafting a purpose for your convening might sound like a check-the-box exercise. Yet it actually serves the very functional role of providing you with a north star to guide you through the many practical choices that follow. A convening that enables participants to innovate will not need the same design as one designed for participants to develop foresight. Even two convenings that enable innovation will have distinct purposes. And while it may feel tempting to write a purpose that spans two or even three of the four types, a purpose that is clear, focused, and specific gives you the rudder you need to make each of the practical choices in a way that serves exactly the goal you have in mind.

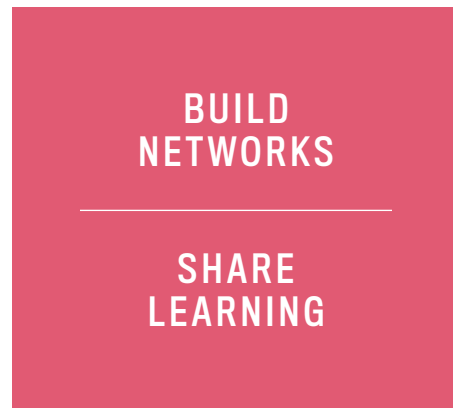
The purpose should drive your choices, but it should also be shaped by new realizations. The remainder of this guidebook shares a set of general principles that apply across all four types

of purposes. Once you have a first draft of your purpose, keep it handy as you work through the remaining stages of the design process, and use it as a lens for interpreting those principles for your particular situation. Then look for the set of principles specific to your type of purpose in the final chapter, Tying it All Together. As you make your design decisions throughout the process, keep testing them against your purpose. If it fails to help you arrive at a clear answer, or when the answer it points to doesn't feel right, turn back to the purpose and try to sharpen it—or revise it.

# DEFINING Your Purpose

## First, cover the fundamentals

**ENGAGE A DIVERSE** range of participants, reflective of different facets of the problem. Help them connect with one another, build trusting relationships, and discover shared areas of commonality.



**ENABLE PARTICIPANTS** to exchange information, expertise, and points of view in a form that benefits their individual and collective practice.

## Then, choose a primary purpose

**INFLUENCE**

**SHAPE THE ATTITUDES** of key stakeholders and the public by inviting thought leaders and decision makers to discuss your initial proposals, use their perspectives to sharpen the ideas, and then use the resulting product to promote broader conversation and action.

**INNOVATE**

**EXPLORE NEW APPROACHES** and enable creative disruption by reframing, reimagining, or recombining different elements and perspectives. Use these inputs to prototype transformational new processes or services and develop ideas for their adoption and scale.

**DEVELOP FORESIGHT**

**ANTICIPATE POTENTIAL CHALLENGES** and identify new opportunities for intervention, by collecting indicators of how the world is evolving today and diverse perspectives about the directions that it could take in the future.

**ALIGN & ACT**

**MOBILIZE STAKEHOLDERS** in different parts of a system to act in concert. Help build a shared understanding of the system and the problem, develop consensus around a common vision, align strategies around it, and support one another in the execution.

# WORKSTREAMS

## The Three Core

**CREATING A CONVENING** is a constant dance between three practical demands: creating the agenda and content, managing engagement and communications with participants, and arranging all of the underlying logistics. Doing each of these well is the science of convening design; doing them as an extension of your purpose is the art.

The details of your work will differ depending on how much of a challenge you've taken on in each of those regards, but the following sample set of workstreams is a general illustration of the tasks that you and your team will need to accomplish.

### START OF PLANNING

#### AGENDA & CONTENT

- Assemble the team, find partners, and run RFP process if necessary, ensuring that all parties understand the purpose
  - Define the objectives
  - Brainstorm design ideas
- 
- Draft and circulate a high-level design, focusing on the purpose
  - Begin research for presentations and pre-reads

#### ENGAGEMENT & COMMUNICATIONS

- Map stakeholders and plan levels of engagement, including social media and other communications
  - Identify core invitees (including potential presenters if needed)
- 
- Interview core invitees (about their interests, availability to participate, and who else to engage), clearly communicating the convening's purpose
  - Issue core invites
  - Identify second-wave invitees

#### LOGISTICS

- Choose the date and location
  - Contract with a local partner (if necessary)
  - Issue RFP to hotels, if necessary
  - Process travel visas
- 
- Choose a hotel
  - Choose venue (if not a hotel)
  - Research dinner and outing prospects
  - Contract with a graphic designer

## AGENDA & CONTENT

- Gather and respond to design input
  - Continue research for presentations and pre-reads
- 
- Refine the design
  - Continue research for presentations and pre-reads
- 
- Role-play the event to anticipate how participants will engage, then refine the design
  - Create first draft of presentations and pre-reads
- 
- Iron out “micro design” (e.g., facilitation guidelines), ensuring that facilitation supports the purpose
  - Refine presentations and pre-reads
- 
- Create templates and supporting materials
  - Finalize presentations and pre-reads

## ENGAGEMENT & COMMUNICATIONS

- Issue second-wave invites (including presenters)
  - Identify backup invitees and presenters
  - Request bios and special needs
- 
- Issue backup participant and presenter invites (if necessary)
  - Communicate important info regarding travel reservations
- 
- Request remaining bios and special needs
  - Finalize bio-book design (if formal bio book is needed)
- 
- Request remaining bios (if necessary)
  - Produce bio book content (if necessary)
  - Recruit participants to blog and tweet during or after the event
- 
- Communicate important travel, logistical, and prep information
  - Initiate any shared online space where participants can connect during or after the event

## LOGISTICS

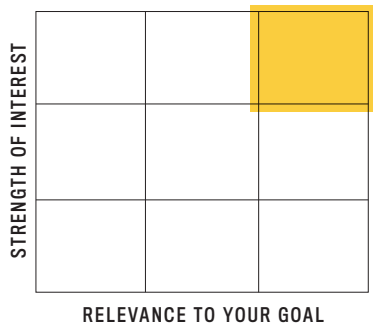
- Make dinner reservations
  - Draft agenda for any outings
- 
- Contract for A/V services
  - Finalize agenda for any outings; begin arranging details
- 
- Purchase air and ground transport, if necessary
  - Finalize outing details
- 
- Print complex paper products (e.g., bio book)
  - Work with venue on logistics, setup, and catering
- 
- Print and ship simple paper products (signs, flip-charts, handouts, name tags)
  - Assemble and ship table supplies

## YOUR CONVENING



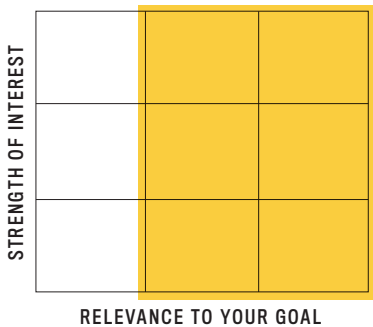
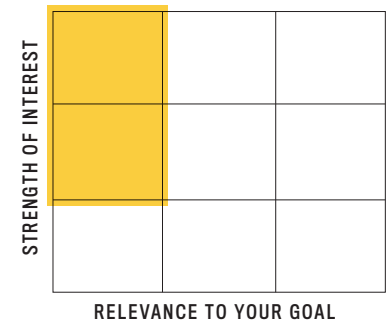
# SEGMENTING your Stakeholders

**ONCE YOU'VE CREATED** a draft list, consider how you want to “segment” your stakeholders according to how you will engage them and the type of role you envision for each. Choose one of four options for each person: whether to consult them on aspects of the design, include them on the invitation list, involve them in a lower-touch way, simply inform them—or not include them at all:



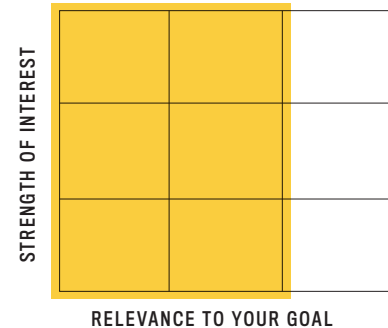
**CONSULT:** This is the highest level of inclusion you can give a participant, giving him or her partial decision rights on the purpose, process, outputs, or any other element of the event. Weigh this decision carefully: it is an opportunity to create powerful buy-in and gain valuable input, but could also complicate and slow down your planning process.

**INVOLVE:** There are ways to include stakeholders without giving them the substantial decision rights you would grant to someone who you plan to “consult.” For example, you could ask for their suggestions on what questions to address or tasks to accomplish; ask them to share brief statements of their point of view or provide reactions to what is created; or encourage them to help distribute the outputs.



**INCLUDE:** These are people you want to have participate in your event but don't need to involve in the design.

**INFORM:** Some stakeholders should hear about the results of the work rather than be involved in the event. This segment could include people you are trying to educate or influence, funders who want to hear about the results of what they supported, or even academics who would be interested in learning about the conclusions.





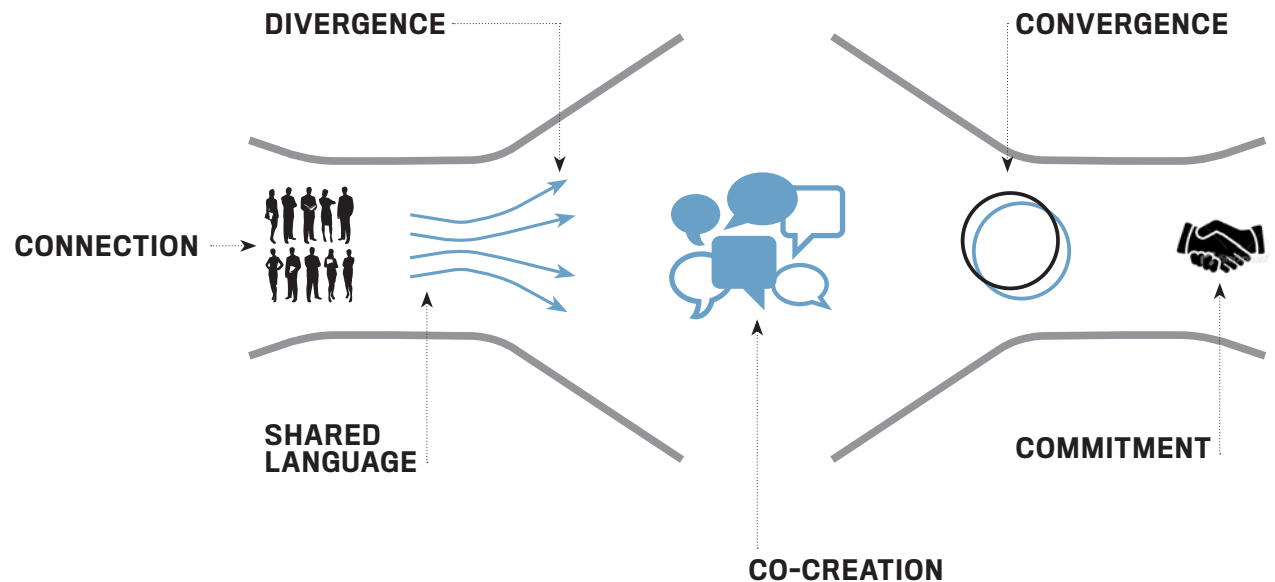
# STRUCTURING

## the Flow of Activities

### Six commonly used stages

**THERE ARE NO HARD AND FAST RULES** for how to structure the blank slate of your designer's agenda. But most well-designed gatherings are structured around a particular series of stages.\* The event begins with connection, establishes a shared language, and then presents a divergent set of views on the topic. Depending on the convening's purpose, that divergence may be

followed by the co-creation of new ideas, convergence on a certain set of answers, or even commitment to take action.



**“A CONVENING IS A DANCE BETWEEN JOINING AND DIFFERENTIATION. PEOPLE CAN ONLY HAVE A JOINING EXPERIENCE FOR SO LONG BEFORE THEY NEED TO DIFFERENTIATE. AND, FOR THE GROUP TO KEEP DOING ITS WORK, THAT DIFFERENTIATION CAN ONLY HAPPEN FOR SO LONG BEFORE THERE NEEDS TO BE SOME JOINING.”**

—CONVENING DESIGNER

\* The concept that participation leads to divergence, and that divergence can be used productively to arrive at shared understanding, was established

# Common INDICATORS of Convening

**DIFFERENT ASPECTS** of a convening's impact can be measured at different intervals after the event. Every convening serves a different contextual purpose, so there can be no single standard, but the list below is a starting place for what indicators are often relevant.

Prior to the convening, be sure to gather data on participant expectations—what they say they want to get out of the gathering—and integrate this into your indicators of impact.

CONVENING

## DURING & IMMEDIATELY AFTER

- Level of participant engagement
- Strength of community (e.g., new connections established, level of trust)
- Extent to which participants are energized and motivated to act (e.g., commitment or demonstrated willingness to take part in follow-on activities)
- Level of knowledge retained from what was communicated and discussed during the convening
- Tangibility and usefulness of outputs (e.g., a new prototype or protocol) and concreteness of next steps

## 2-3 MONTHS

- Levels of ongoing communication and other information flow among participants (e.g., listserv activity)
- Level of knowledge applied that was developed during the convening
- Progress made on next steps articulated at convening
- Continued work on the outputs
- Extent to which participants initiate new projects or activities inspired by convening
- Emergence of new collaborations among participants who connected at the convening

## 6+ MONTHS

- Same as two to three months after, plus...*
- Whether the convening is viewed as making an important contribution to:
  - Shifts in the public discourse
  - New tools or services being developed
  - Stronger performance by organizations and groups working in the system
  - Progress on desired field-level outcomes