CONVENING
PRODUCTION 2022

The Rockefeller Foundation

CONVENING PRODUCTION TABLE OF CONTENTS

FOREWORD

Philanthropies, especially large ones like The Rockefeller Foundation, are uniquely able to drive broader collaborations. They have the capital, the expertise, and the convening powers to catalyze substantive collaboration between government, the private sector, civil society, and the communities they want to serve.

Convening has long been part of The Rockefeller Foundation's success in helping to advance the well-being of humanity.

In 1959, the Foundation was gifted the Bellagio Center by Ella Holbrook Walker, the American Principessa della Torre e Tasso, who donated the property to the Foundation *"for the promotion of international understanding."* With that donation came a tremendous responsibility and opportunity.

For more than 50 years, The Rockefeller Foundation has hosted leading practitioners from around the globe at our Bellagio Center to build and mobilize alliances of diverse stakeholders around a shared vision, empowering widespread collaboration, innovation, and action; and enabling mutual accountability for progress.

As a result, transformative initiatives have launched from Bellagio including the Green Revolution for Agriculture, the Forum for African Women Educationalists, the Global Alliance for Vaccines and Immunization, and the field of impact investing.

To fully benefit from the magic of Bellagio and The Rockefeller Foundation's convening power, we have developed and tested approaches to convening design and production, both for in person convenings at places like Bellagio, and virtual convenings.

In addition to an overall Convening Guide, we have created these two sub-guides. This one focuses on production and its companion focuses on design. The guides include inspiration from strategy consulting, user-experience design, behavioral sciences, and event management. The intention of both are to guide the design and production of strategic convenings, fostering conversation that leads to action and maximizing opportunity for impact.

Sarah Geisenheimer
Managing Director, Innovation
January 2022

WHAT WE LEARNED

There are **five core elements** of impactful convening:

1 Focus on a single purpose.

Oftentimes, the vision for convenings can be so bold, or aim to please so many, that there is too much to achieve, which means nothing may be achieved. What specifically are you trying to achieve and how will bringing together a group of people around a shared table, or in a shared experience, help you achieve it?

2 Design for the experience.

The participants in a convening are typically volunteering their time and energy. How can you maximize the value of having brought together their diverse perspectives, skills, and experiences for a finite moment in time? How can you create an experience for people that leads to meaningful engagement and connection?

3 Be intentional about participants.

A convening is, in essence, a group of people who will bring to it knowledge or insight required to achieve your purpose. Whose perspectives do you need to achieve your purpose? How can you integrate diverse voices to lead to more productive, well-rounded solutions?

4 Execute flawlessly.

Excellent convenings take work and can feel unmanageable if not properly planned. They also require adaptation. What is the purpose and intended spirit of the convening that will guide a flexible design? Who is the ultimate decision maker and who will produce your convening? What needs to happen, when, to ensure the flawless execution that enables participants to remain focused on the intended purpose?

5 Commit to action and follow up.

A convening is a step in a process to achieve impact. To maximize the potential for action following a convening, it's important to convene a group of people who can commit to the actions they recommend; rather than to make vague recommendations for others (not in the room) to take up. Who do you need to take action following the convening to achieve your ultimate goals? How will you engage the participants before, during, and after the convening to help position them for success?

EARLY
ALIGNMENT

Throughout this production focused guide there are mentions of the **Caspian 10 Essentials** as well as Execution Tips.

> These guidelines ensure that strategy and design are carried through the implementation stage.

By using this systematic approach it is possible to achieve replicable results regardless of the scope and scale of the convening. And outlining the team, roles, and process in advance creates a motivated and efficient team.

The Essentials are taught as master's program material at San Diego State University and have been used for Caspian client convenings around the globe since 2005.
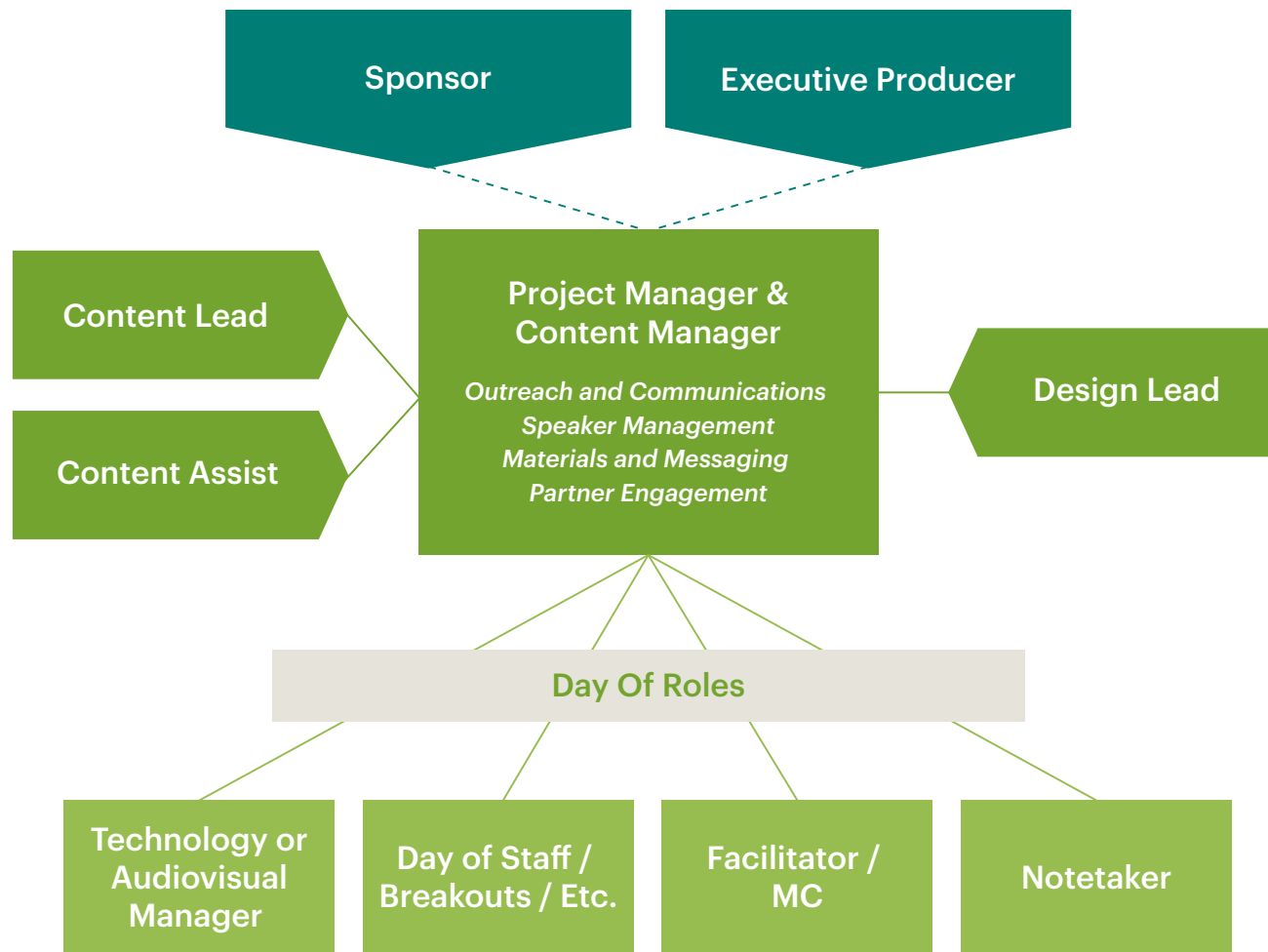
The 10 Essentials are:

1. Success Metrics
2. Audience Mix Analysis
3. Content Mapping
4. Roles & Responsibilities
5. Speaker Leverage & Logistics
6. Communication Plans
7. Registration Logic
8. Brand Look & Feel
9. Timeline
10. Budget

*Note: Only relevant Essentials are called out in this document

TEAM ORGANIZATION CHART

Sponsor

Executive Producer

Content Lead

Content Assist

Project Manager & Content Manager

Outreach and Communications
Speaker Management
Materials and Messaging
Partner Engagement

Design Lead

Day Of Roles

Technology or Audiovisual Manager

Day of Staff / Breakouts / Etc.

Facilitator / MC

Notetaker

The most important part of resourcing a convening team well is establishing the Project Manager as the central point.

This person is the hub, where all roles, regardless of seniority, report. This keeps the project focused and all members aligned throughout.

While the project needs to be well-resourced, on smaller projects, one person may take on multiple roles.

EXECUTIVE
ROLES

The following are a description of key team roles in a convening. Not all convenings will require all of these roles, and some individuals may hold a few roles simultaneously.

Sponsor

The sponsor calls for the convening, defines its purpose, sets the overall vision and outline of the design and oversees the process at a high level.

Oversight of budgets and contracts

Executive Producer

Coordination and alignment between design team and client; Attends initial planning and design meetings and jumps in to help course correct.

Ensures alignment between purpose, design, and execution

May attend initial planning meetings

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TEAM ROLES
PROJECT MANAGEMENT

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Project Manager
(NOTE: This is not an administrative role, or an expert in the content, but an expert in project management)

Project Tasks
- Creates the project plan
- Tracks and manages the timeline and action items
- Receives status reports from all other roles
- Manages the budget (if applicable)
- Develops run of show
- Assigns day of roles, including note takers

Outreach & Comms Management
- Selects registration platform, if needed
- Finalizes participant list and sends invitations
- Manages RSVPs
- Sends final details for the convening, including any materials
- Sends post-convening survey

Outreach & Speakers
- Invites speakers and manages their experience throughout

Messaging & Materials Management
- Works with the Content Lead to ensure that all materials are accurate, professional and complete - this may mean interfacing with speakers and facilitators to secure material from them in the proper format in a timely fashion
- Ensure assets like bios, agenda, and pre-read materials are in order for distribution to attendees

TEAM ROLES
DESIGN + CONTENT

Design Lead

- Determines tactics and agenda flow based on selected convening purpose and content
- Prepares participant facing and moderator agenda

Content Lead

- Determines convening purpose and content, in consultation with sponsor and design lead
- Works with speakers from the content perspective
- Works closely with the Project Manager on materials and messaging
- Encourages critical participants to attend from partner organizations, including pre-engagement and follow up post-convening

Project Assist

- Works with the Project Manager and the Content Lead to manage the materials, communications, and outreach as needed for partners, speakers, and participants
- Acts as time keeper on day-of

TEAM ROLES
DAY-OF

Facilitator(s) / MC

- May also be from a client team or partner, however if this person is not a professional MC then we recommend more run-throughs

- The main forward facing personality during the convening itself

- Need to understand the content and design and engage the participants fully; they need to act quickly on their feet to keep the program moving in harmony with the purpose

Notetaker(s)

- The notetakers are familiar with the subject area and meticulous in capturing complex ideas accurately in real time

- They will attend the convening and capture the substance of what happens to inform post-convening communications and reports

Technology or Audiovisual Manager

- Deliver the technology to make the convening happen, either via a technology platform if done virtually, or via presentations– or other means– if in-person

Caspian Execution Tip:

While roles are often referred to as "Day Of" there will always be prep-days involved. Plot those out in advance on your timeline to assure that these roles are holding not just the Convening day but all the prep days as well.

PHASE 1
DISCOVERY+DEFINITION
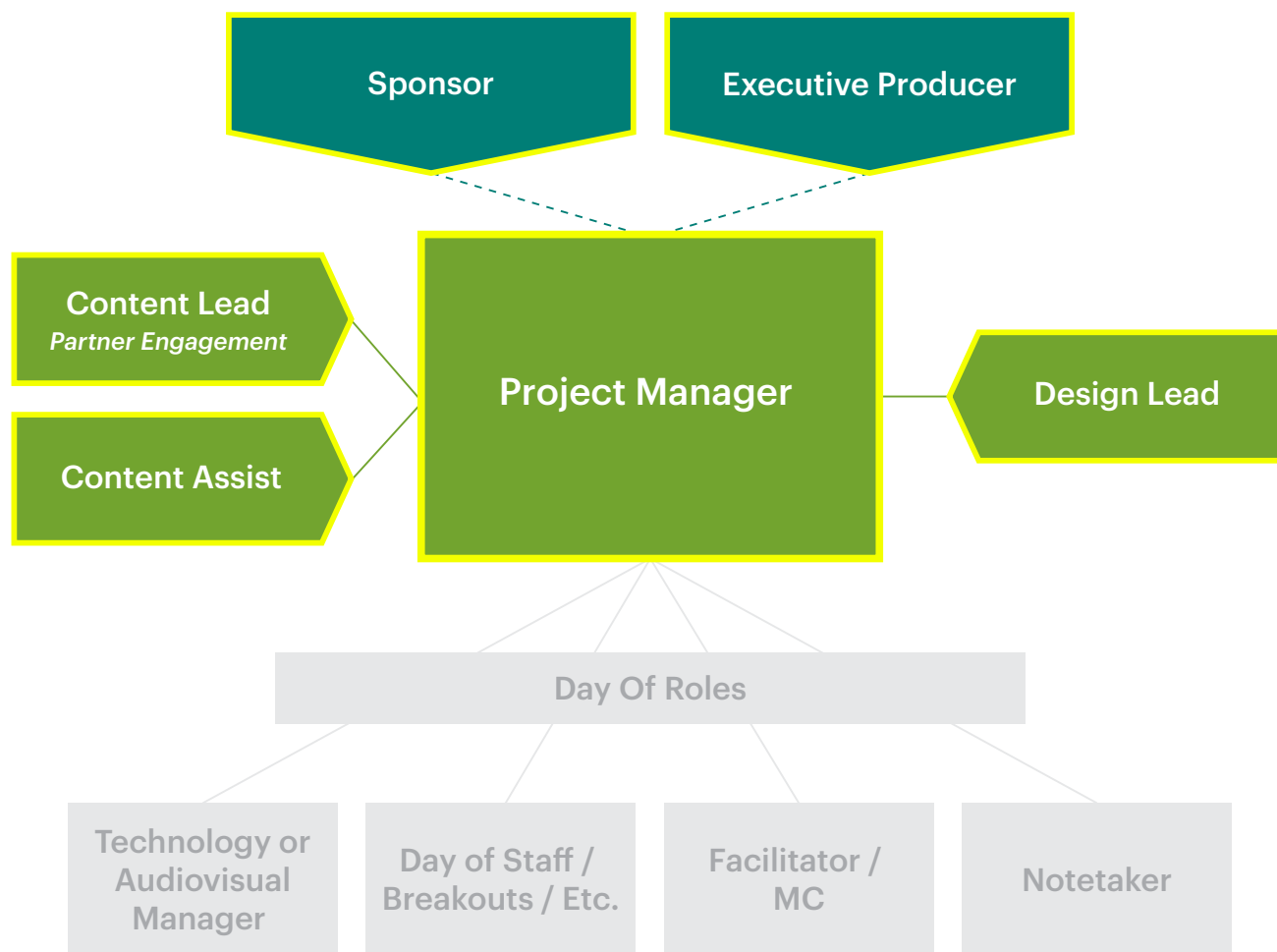
Discovery and Definition Goals

Gain clarity on the purpose and ambition of the convening, what this convening or convening journey can achieve in the world, what it should feel like, and who needs to be there.
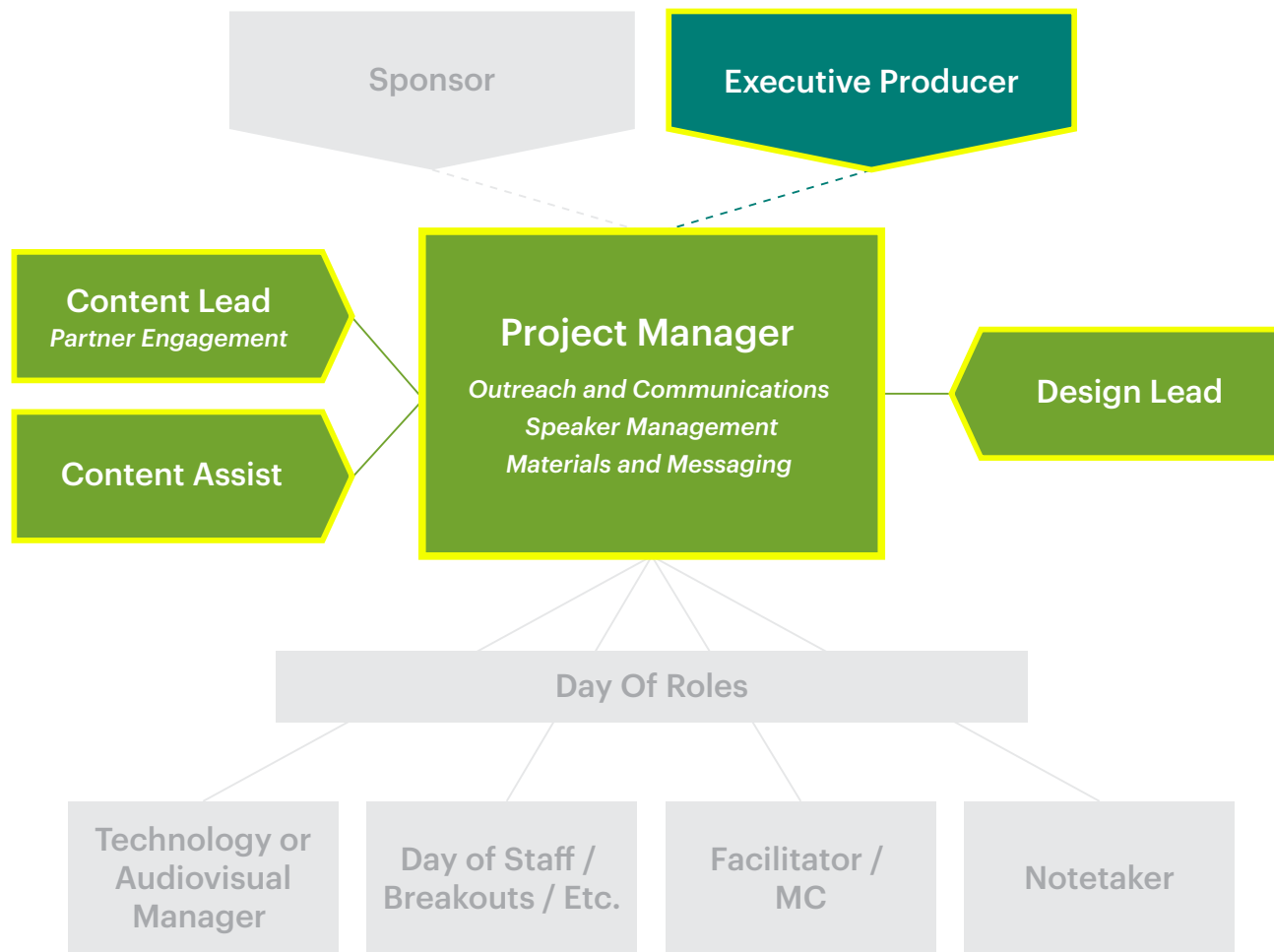
Roles most involved

- Sponsor
- Executive Producer
- Content Lead
- Design Lead
- Project Manager

Tools

- Blueprint for Strategic Convenings
- Strategy One-Pager
- Convening Guide

PHASE 2 | DESIGN |

Sponsor

Executive Producer

Content Lead
Partner Engagement

Project Manager
Outreach and Communications
Speaker Management
Materials and Messaging

Content Assist

Design Lead

Day Of Roles

Technology or Audiovisual Manager

Day of Staff / Breakouts / Etc.

Facilitator / MC

Notetaker

Design Goals

Connect the purpose to what should happen in the room and how specifically to create momentum towards impactful outcomes and products.
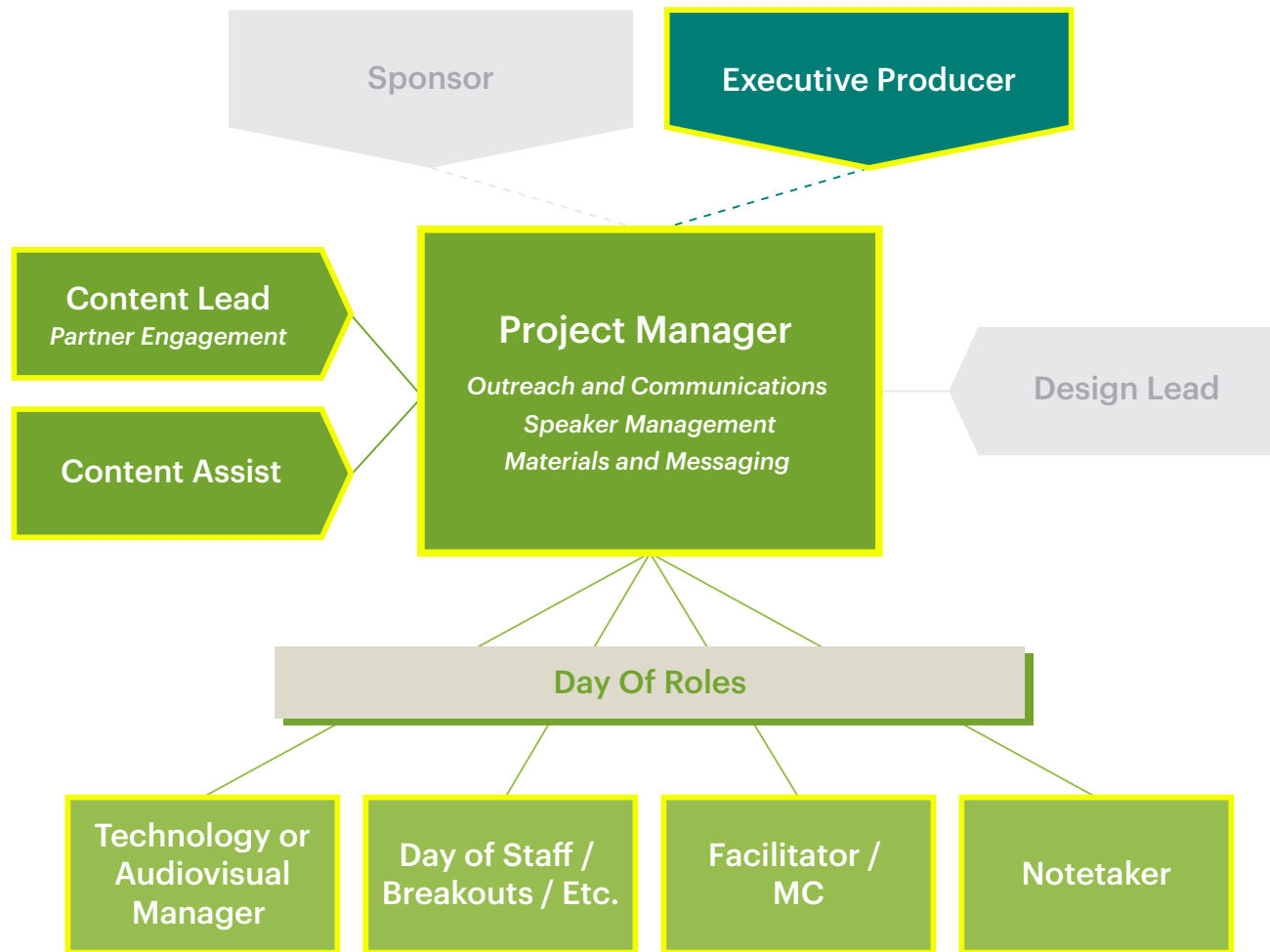
Roles most involved

- Executive Producer
- Content Lead
- Design Lead
- Project Manager

Tools

- Design Recommendations Memo
- Agenda
- Attendee Assessment
- Caspian 10 Essentials

In this phase, the date and location may play a role in design

PHASE 3
PRODUCTION

Sponsor

Executive Producer

Content Lead
Partner Engagement

Content Assist

Project Manager

Outreach and Communications
Speaker Management
Materials and Messaging

Design Lead

Day Of Roles

Technology or Audiovisual Manager

Day of Staff / Breakouts / Etc.

Facilitator / MC

Notetaker

Production Goals

- Create the run of show
- Send invites
- Prep the speakers and participants
- Prepare the location (physical or virtual)
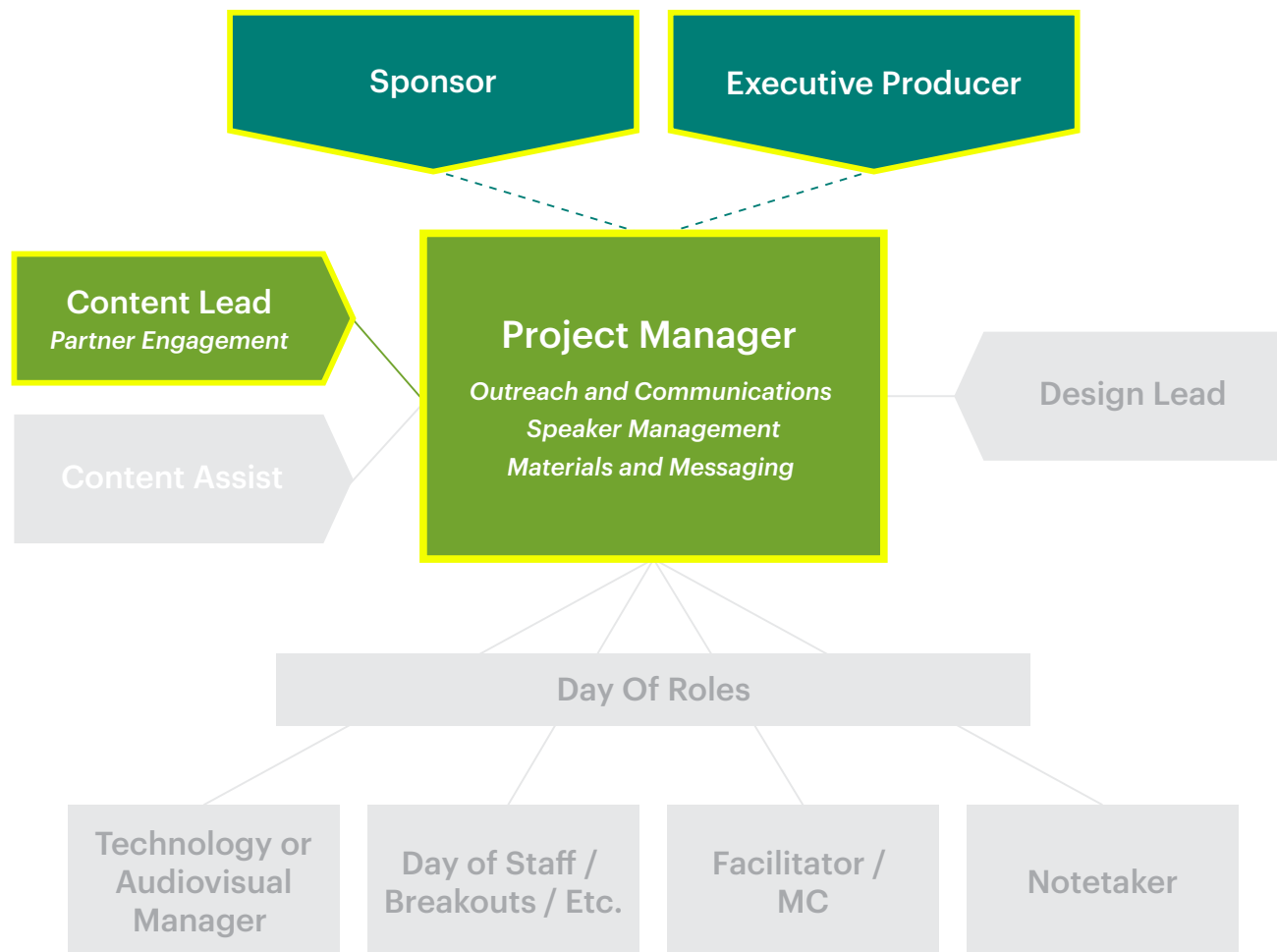- Host, orchestrate, and facilitate

Roles most involved

- Project Manager
- Content Lead
- Technology Manager
- Facilitator and MCs
- Assistants / Staff

Tools

- Moderator Agenda
- Showflow
- Caspian 10 Essentials

PHASE 4
CONTINUED ENGAGEMENT

Sponsor

Executive Producer

Content Lead
Partner Engagement

Project Manager

Outreach and Communications
Speaker Management
Materials and Messaging

Content Assist

Design Lead

Day Of Roles

Technology or Audiovisual Manager

Day of Staff / Breakouts / Etc.

Facilitator / MC

Notetaker

Continued Engagement and Assessment Goals

- Foster connections and collaboration between attendees
- Assess the effectiveness of the convening
- Gather lessons learned and revise working process as needed

Roles most involved

- Sponsors
- Executive Producer
- Content Lead
- Materials and Messaging Manager
- Communications Manager
- Partner Manager

Tools

- Post convening survey
- After action review
- Report out document

ADDITIONAL ROLES TO CONSIDER

Additional roles may be necessary during the running of the convening, which will be dictated by your schedule and programming. These could include:

Virtual

- Tech Platform Manager (Zoom or other)
- Breakout Manager
- Timekeeper (can also combine with another role)
- Chat Box Monitor(s)
- Technology Concierge (for large groups or high-service level groups as a troubleshooter)
- Lobby Manager (for multiple casual Zoom rooms)

In Person

- Breakout Manager
- Stage Manager
- VIP / Stakeholder Manager (if needed)
- Various on-site stewarding roles

Caspian Staffing Tip:

Staffing in the in-person world can sometimes accommodate having room captains or stewards 'double up roles' or switch halfway through the day. However, virtual is not as forgiving. It's much more like broadcast TV staffing where each person has their own role and must focus on that, and that alone in order to have a flawless convening.

Even on-site, having more staff than less is in your best interest. You are producing a live show, and being short staffed is not worth it for the stress it can bring. A hybrid convening will usually require double the staffing to manage the content flow and experience for both online and on-site attendees.

ADDITIONAL TEAM CONSIDERATIONS

We find that one of the most important elements to successful execution is determining whether your team has the resources in-house to produce the convening. This should be decided as soon as the goals, tactics and design has been determined. Otherwise staff burnout could disrupt an otherwise excellent convening strategy. This can usually be solved by involving more staff from the start or outsourcing.

Caspian Essential #3: Roles & Responsibilities

Shorter timelines often involve more resources and have implications across all areas, especially budget and audience availability, and can place a large strain on internal staff associated with the convening, whether in getting attendance, managing partner communications, or preparing the logistics.

Caspian Essential #9: Timeline

VIRTUAL AGENDA

WHEN TO MEET ONLINE
INSTEAD OF IN-PERSON

Virtual meeting spaces are very flexible and are naturally suited for quickly gathering people who may be unable to travel or have busy schedules. During 2020 and 2021, nearly all organizations converted to virtual convenings due to the Covid pandemic. This ushered in broader acceptance and adoption of virtual platforms and best practices, making this type of convening far more viable than ever before.

But while online gatherings may sound like an easier way to achieve the same goals as an in-person gathering, the lack of in-person connection makes it more challenging to achieve a visceral sense of community and a high level of interactivity, both of which are crucial to a group becoming greater than the sum of its parts. Yet there are still many situations when a virtual convening is a good choice, and they can complement a Convening Journey which might include virtual gatherings and kick-off or culminate with an in-person convening.

EXECUTION TIP: Consider that virtual communities can be a part of an in-person strategy as well, leading into a live event, and out of it again to keep the momentum high and continuing the conversation and community.

This page adapted from The Gather Guide

VIRTUAL AGENDA (CONTINUED)

Conditions for
Convening Virtually*

Below are some guidelines for how to use the virtual space well.

IF ...

Participants have at least moderate comfort with socializing online and with the platform you've chosen

And they all have sufficient connectivity for easy participation

And there are too many obstacles to gather people in person

And the urgency is high enough that organizing an in-person meeting would take too long

And there are participant availability issues, they lack resources, or there are some other hard constraints that prevent meeting in person (such as visas, etc.)

*This section adapted from The Gather Guide

Takeaways from a successful
Virtual Convening

With one of our virtual events, we created (3) main segments which moved the attendees through a complex and sensitive topic. We did this by starting with defining the problem, brainstorming tactics, and issuing a final challenge around how to build trust and confidence.

We also wanted people to engage and share expertise, not just listen. So we hosted (3) minute conversation catalysts and ended with specific what/how questions to engage the expertise in the virtual room.

EXECUTION TIP: Keep agendas to 90 minutes or less to get best attendance, and their attention. Consider adding a musical 'soundtrack' to keep the energy high or to signal moving to another topic or type of session. It can be thematic, or not, but will help keep the agenda moving and participants alert. Also even in virtual, breaks for attendees can increase participation, not decrease it, so add every hour at minimum.

VIRTUAL CONSIDERATIONS

THE VIBE

▶ **Visual Identity.** Prioritize using a consistent style throughout the convening (agenda, direct email headers, landing page, lower thirds, holding slide).

▶ **Waiting Music.** Steer away from the elevator jazz and play something more aligned with the mood of the event (e.g., for 17 Rooms selections included *"The Room Where It Happened"* and *"Who Run the World"*).

▶ **A Uniform.** When hosting one convening, we had our staff wear matching logo t-shirts—superfluous, but a hit in the chat.

▶ **Video Production.** Leverage the ability to create high production pre-recorded videos to introduce the event or specific topics.

SAMPLE VIDEOS

17 Rooms

https://vimeo.com/601703099

Digital Public Infrastructure (DPI)

VIRTUAL CONSIDERATIONS *(CONTINUED)*

THE OPERATION

▶ **Opening moment.** Before spotlighting the initial speakers, allowing 2 minutes in gallery view to see each other sets the tone.

▶ **Health breaks.** Be sure to schedule health breaks to reduce fatigue. Use a timer to show how long is remaining.

▶ **Dress rehearsal.** These are critical to align details with speakers and make them comfortable before the day.

▶ **Spotlight.** In Zoom, *Spotlight* only works when people have their video on, so this may be someone's role to ensure speakers are ready and waiting with video on.

▶ **Determine the final knowledge product ahead of time.**
Preferably in conjunction to the convening format decision, to allow for simultaneous planning and production.

ESSENTIAL
Pre-Assigned Roles and Responsibilities:

▶ **Room captain**

Responsible for operational management of the rooms (timekeeping, opening the breakouts, note-taking, etc.) This allows moderators or facilitators to truly focus on content.

▶ **Chat manager**

Posts regular announcements or prompts in the chat, responds to questions, and lets the attendees know they are being heard.

FINAL TIPS
NORMS & GUIDELINES

EXECUTION TIP: ATTENDEE NUMBERS AND PARTICIPATION
Every gathering will be different, but numbers matter in terms of degree, potential, and type of participation.

EXECUTION TIP: CREATE "NORMS" IN VIRTUAL

Permission to look away

Permission to turn the camera off

Permission to introduce yourself

Doodle

| 3-4 | 5-10 | 11-25 | 25-50 | 50-100 | 100+ |

Active Conversation

Active Discussion

Requires Facilitation

Requires Facilitation

Requires Facilitation

Not all will be able to participate verbally unless put in breakouts

Requires chatbox or pre-sent questions

May be considered broadcast

Highly recommend requesting questions in advance

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EVENT SCIENCE

Convers(ate)

Dust
& company

The
Rockefeller
Foundation