

CONVENING DESIGN 2022



CONVENING DESIGN

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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.

The pages that follow include inspiration from strategy consulting, user-experience design, behavioral sciences, and event management. The intention is 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?

**WHERE
TO START**

OVERALL CONSIDERATIONS

THE DESIGN

- ▶ **Be exceptionally clear on your purpose.** What do you want to happen as a result of the convening? Do you want people to take action, to make new connections, or to understand new knowledge or perspectives?
- ▶ **Consider the segments of attendees you need to achieve your purpose.** Who is going to play what role to advance the conversation and to take forward action post convening?
- ▶ **Intentionally design sessions to achieve your purpose.** For example, if your purpose is action, consider what it takes to get people to be engaged enough to “own” next steps to action. This is probably light on listening and learning and heavy on engaging in conversation for sensemaking, productive debate, and action planning. Strive for diversity and take advantage of the skills, experiences, and perspectives in the room by doing as much conversation, and less presentation, as possible.
- ▶ **Connect people’s personal experience to the content with opening prompts.** This creates space for everyone to be included and feel “part of” the convening, no matter their level of knowledge or involvement in the discussion.
- ▶ **Consider time intervals between listening and opportunities for engagement.** People are most engaged when they are talking, and most of us need time to think. *For large virtual convenings, encourage chat participation, and use chat moderators.*
- ▶ **Facilitate prompts with specific questions.** General Q&As or “what do you think” do not generate the most useful responses.
- ▶ **Be ready to adjust course during the convening.** Flexibility is an asset, especially if over multiple days. Center on your purpose, for the convening and for each session, and redesign based on the experience, to achieve that purpose.
- ▶ **Advance action.** From the initial design, to attendees, to follow-up, stay focused on advancing action post convening. Focus the convening on what those in the room can do to advance action; make sure the convening includes representatives from stakeholder groups you need to take action. And don’t fall off the convening cliff. Make sure that the group is connected post convening and taking next steps. Consider a follow-up call within a month post convening to align on action and roles.



www.

Use this blueprint to guide your thinking:
<https://tinyurl.com/conveningblueprint>

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)

<https://media.rockefellerfoundation.org/Share/4rt7d0a0dlou3xp5srr7x7or6p4syd11>

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.

THE RIGHT TOOL?

Convening is a powerful tool for impact, but it 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**. Use the following set of considerations to determine if bringing together a diverse group of stakeholders is the best path forward.

THE RIGHT TOOL?

CONSIDERATIONS	ALTERNATIVES
Can the purpose/opportunity be clearly articulated in a short sentence?	When the purpose is not clear, focus first on deeper research and framing. Defining the purpose of your convening is the most important step. Your purpose will guide the design and participant mix needed to achieve your objectives.
Is the issue ripe for meaningful progress? Is there a sufficient energy around the issue to "tip" to a new level of insight or action?	When the issue is nascent, ill-defined, and/or lacking critical mass, focus on mapping the system and connecting players with shared interests.
Can the critical stakeholders be assembled? And does this call for collective intelligence to solve?	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.
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? Keep in mind that under-resourced convenings can be a source of burnout for staff, so don't compromise on proper resourcing and planning.	If not, hold off until you've secured ample leadership capacity and design and production team members, and consider less support-intensive alternatives for connecting the group such as conference calls, webinars, surveys, forums, or wikis.
Do you need to be the primary convener?	If other actors would be better positioned to take the lead role - or are already holding a related convening - explore partnerships.



KEY QUESTIONS

- What is the underlying purpose of your convening?
- How will the convening purpose help you achieve the larger objectives for your work?
- How do you want attendees to feel before, during and after the convening?
- What do you want attendees to do post-convening?
- How will you structure the agenda to achieve your purpose and goals for what attendees will feel and do as a result of convening?
- How formal or informal do you want the convening to be?

DEFINING STRATEGIC CONVENINGS

Strategic convening is an intentional practice to foster conversation that leads to action. Strategic convening prioritizes specific action and the experience of participants to generate buy-in, ownership, and commitment.

Specifically, Strategic Convenings:

Achieve breakthrough outcomes, overcoming a stubborn barrier or making an innovative leap forward, that accelerates progress towards longer-term goal.

Draw on a diverse set of stakeholders to participate in a curated experience that elicits a range of perspectives and ideas required to achieve a breakthrough otherwise not possible.

Secure commitment for post-convening action, often mobilizing additional resources to achieve the breakthrough.

Spark unforeseen collaborations to address new challenges and opportunities that emerge on the longer journey.

STRATEGIC CONVENING PURPOSES

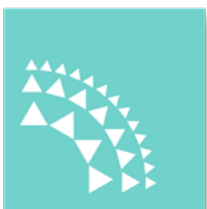
Strategic convenings are marked by higher stakes than a typical meeting, with careful consideration of how and why everyone comes together and what should result after. They also have a strong focus on connection and collaboration among attendees.

ALL CONVENINGS



Build Networks*

Engage a diverse range of committed participants, reflective of different facets of the problem. Help them connect with one another, build trusting relationships, and discover shared goals.



Share Learning*

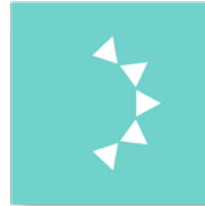
Enable participants to exchange information, expertise, and points of view in a form that benefits their individual and collective practice.



After establishing your purpose, the next step will inevitably turn to tactics. Within each tactic is usually a logistic element. Crafting convening goals using GOTM, or Goals, Outcomes, Tactics and Measurements, will draw out any hidden assumptions from the start, and will set your team up for success when executing on the plan.

CONVENING TYPOLOGIES

The following purpose statements will help guide the identification of your purpose to convene. In some cases, **you may need to achieve more than one purpose.** This can be accomplished with careful attention to design and sequencing, sometimes convening over a period of time.



Map a Landscape

Bring together diverse stakeholders to uncover the nature of a problem or opportunity that is impossible to understand fully from any one perspective



Forge Alliances

Bring together groups or individuals to build relationships, consensus, and collaboration necessary to address a problem or opportunity



Discover a Path Forward

Enable committed actors to consider a clear challenge or opportunity and decide how to address it

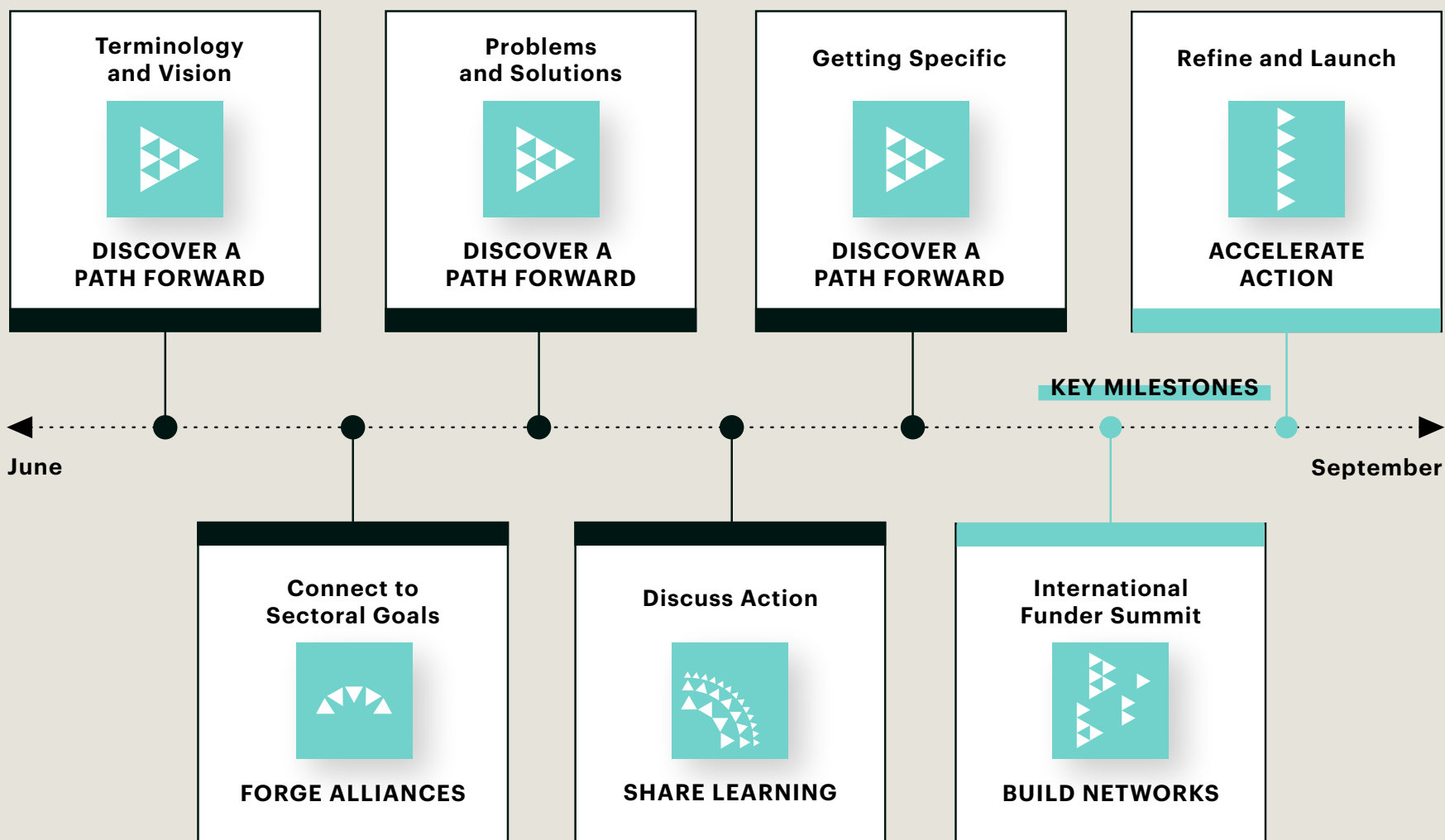


Accelerate Action

Seize the moment for change by bringing together well-positioned groups and individuals to develop a plan to accelerate action

EXAMPLE CONVENING JOURNEY

A **Convening Journey** is a tool to facilitate a series of interconnected convenings to achieve a larger goal. The journey helps ensure each convening is focused on a core purpose.





PURPOSE | MAP A LANDSCAPE

Convening Purpose: Bring together diverse stakeholders to uncover the nature of a problem or opportunity that is impossible to understand fully from any one perspective.



INTRODUCTION: <10%

Welcome, Introductions,
Context Setting

Emphasis on the early stages of
this work and the many varied
possibilities that exist

INTERACTION: ~75%

Optimized for discovering the range of possibilities and opportunities. For this portion of the convening, the agenda should consider how talk-time is shared by individuals representing varied perspectives.

Hear from Experts

Lightning Talk (Speaker) [10 min] or
Conversation Catalyst [3 mins], plus

- What/How Questions
- Discussion
- Repeat

**Recommended transition time in between sections*

Participant Brainstorm

Facilitated discussion prompts designed to encourage exploration on possibilities / range of opportunities

**Full group or smaller breakout groups*

MEANING MAKING: ~15%

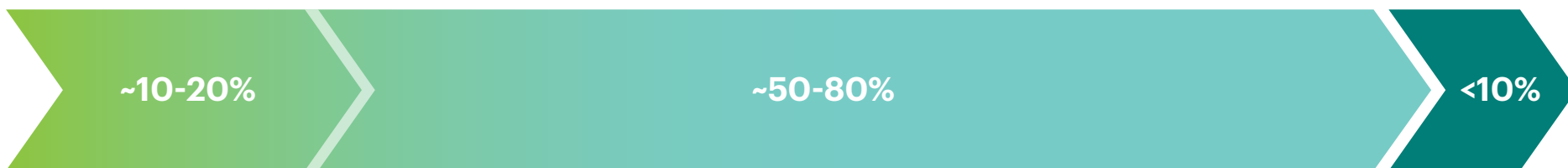
Share a compelling summary of
the discussion

Invite participants to name or
share personal takeaways or the
most compelling opportunity
they will pursue



PURPOSE | FORGE ALLIANCES

Convening Purpose: Bring together groups or individuals to build relationships, consensus and collaboration necessary to address a problem or opportunity.



INTRODUCTION: ~10-20%

Welcome, Introductions,
Context Setting

Emphasis on a past example of
an alliance forged at a similar
convening

INTERACTION: ~50-80%

Optimized for building connections for meaningful and sustained partnership. For this portion of the convening, the agenda should create dedicated time, space, and structure for personal relationships and alignment on shared interest to strengthen or emerge.

Bond by Doing

Facilitated brainstorm or working session. Relationship building by "active doing," making progress together toward an achievable goal within allotted time frame

Share the Mic

Breakout room discussions, guided by compelling prompt(s) to increase participant talk time ratio and overall depth of personal engagement

MEANING MAKING: ~10%

Share a compelling summary of
the discussion

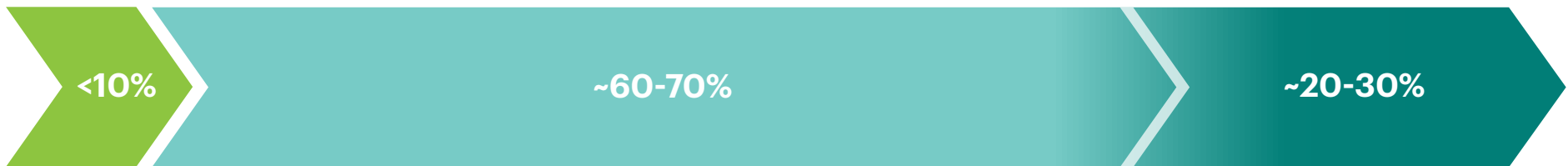
Invite participants to commit to who
they will follow up with, and specific
next steps

**Note: As this typology prioritizes building relationships, refer to the pages on Building Community (pp. 17-20) to incorporate additional relationship building tactics throughout the agenda.*



PURPOSE | DISCOVER A PATHWAY FORWARD

Convening Purpose: Enable committed actors to consider a clear challenge or opportunity and decide how to address it.



INTRODUCTION: <10%

Welcome, Introductions,
Clearly stating the end goal of a
decision point

Emphasis on the progress made
already to align on alternatives

INTERACTION: ~60-70%

Reviewing strategic alternatives and making a decision.

For this portion, the agenda should focus on structured discussion on strategic alternatives with an aim to get to consensus on a pathway forward. After this, offer a structure for alignment on decision process, criteria, and ownership for action.

Align on Criteria

State the alternatives. Jointly determine how the group will make the decision/ weigh considerations

**Recommended setting a time limit;
time pressure can be helpful.*

Evaluate and Discuss

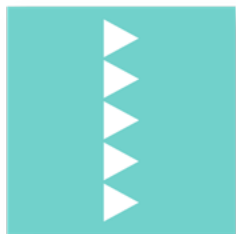
Facilitate an evaluation or discussion of each major strategic option against decision criteria or from a vantage point using something like the six hats protocol

MEANING MAKING: ~20-30%

Share a compelling summary of the discussion and resulting decision (or progress toward decision) that was agreed upon

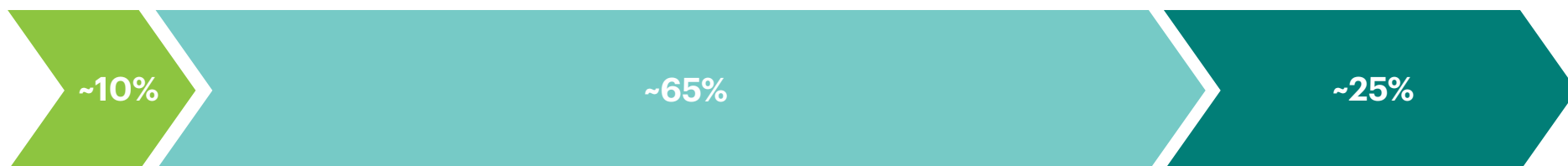
Consider a formal round of commitment statements OR a sharing opportunity for why this decision and resulting action to follow will be meaningful

**Note: This particular typology can vary widely depending on overall buy-in on alternatives, size of the participant group, and who is in the room.*



PURPOSE | ACCELERATE ACTION

Convening Purpose: Seize the moment for change by bringing together well positioned groups and individuals to develop a plan to accelerate action.



INTRODUCTION: ~10%

Welcome, Introductions,
Context Setting

Emphasis on the intended result and related impact and the commitment of what this group will do (as opposed to general recommendations for others to pursue)

INTERACTION: ~65%

Optimized for breaking through remaining barriers and making/ committing to a plan. This agenda presumes an existing shared commitment from leadership of participating organizations. For this typology, it is crucial that the people doing the work (e.g., the teams supporting leadership) are present and engaged. This agenda is not about asking “what if”, it’s about asking “how”.

Name the Gap

Identify actions against a specific timeframe (e.g., 6, 12, and 18 months) and identify gaps and needs

Overcome Barriers

Working session to identify barriers and create a mitigation plan for each ensuring specific actions and named owners

**Recommend a skilled facilitator who can support in narrowing the focus, in the event the barriers become broad*

MEANING MAKING: ~25%

Determine clear acceleration goal and develop supporting plan

Close the session with a specific deliverable (e.g., a specific small-step plan that supports the accelerated timeline against the original timeline and a tool that assigns accountabilities for action

IDEAS TO TRY PRE-CONVENING

Interview

Interview knowledgeable participants beforehand and share their perspectives as a pre-read to help get the group up to speed.

Research

Research and share background information on unresolved questions if participants would not know the full picture themselves or when there is not time to construct the picture collectively.

Share Before the Event

Before the convening, ask participants to share experiences or information related to the topic, and then play those back through a pre-read, in opening remarks, or on a wall poster.

Reflect Before the Event

Ask participants to actively engage with the topic beforehand. This can be through pre-readings, crowdsourcing articles for others, or something as simple as encouraging them to gather their thoughts on a notepad before the convening.

Draw From Collective Wisdom

Draw from collective wisdom to curate a crowdsourced reading list. It can add to your knowledge base and generate more buy-in.

Record Video Messages

Record video messages from speakers, experts, or participants to share perspectives or set the frame for the discussion and send those in advance or host on the convening website.

Convene Virtually

Convene virtually in advance of the gathering to create connections and develop a shared understanding among participants. Taking care of these items before the in-person convening can set you up for success and allow you jump into the discussions that center on the purpose of your convening.



Pre-reading and advanced materials are excellent knowledge sharing tactics. However, they both require time and staffing. Keep this in mind as you think of what types of information you want to share, if they will be original creations, if they need to be professionally designed, printed, and shipped, and how they will fit into the overall communications plans and resources available.

TIPS + TRICKS

Building Community Before a Convening

1. Share biographies in advance (with a similar length and format for all).
2. Send pre-read or pre-watch materials that are personally signed by a host or important participant.
3. Offer a pre-convening, opt-in meet-and-greet pairing in advance, coordinated by host. These can be curated or randomized pairs or trios.



Idea: Present two versions of a bio template - one that is more formal and one that is more creative/informal.

TIPS + TRICKS

Building Community During a Convening

1. Open up the meeting space or virtual platform 20 minutes early for an [optional] conversation “roulette” or random pairing via a breakout room feature. This is a simple addition that can provide 1:1 time with various members of the group with minimal commitment or scheduling required.
2. When facilitating introductions, invite (and/or model) brief, personal introductions. This is valuable because the agenda design will offer ample opportunity to understand intellectual perspectives and expertise.
3. Make the convening memorable for participants.
4. Use breakout rooms, to mix up the group and provide additional 1:1 or small group talk time.



Idea: Tee up the introductions as a new way to get to know an accomplished group of professionals, acknowledging the bios shared in advance and intentionally reserving space for maximum discussion time.



Idea: Offer multiple questions to answer as part of an introduction and invite responses in the form of “I chose Q1 and my answer is...” Consider sharing a slide with prompts.



Idea: Take a group photo or screen capture at a milestone moment to further support a component of group identity.



Idea: Facilitate a moment for participants to reflect on any learnings/insights that were the result of another participant.

TIPS + TRICKS



Idea: Make this personal by sending email introductions with a key fact or commonality among the members of the pair.



Idea: This might also be an opportunity to spotlight a participant's biography and/or a meaningful quote shared during the prior convening.

Building Community After a Convening

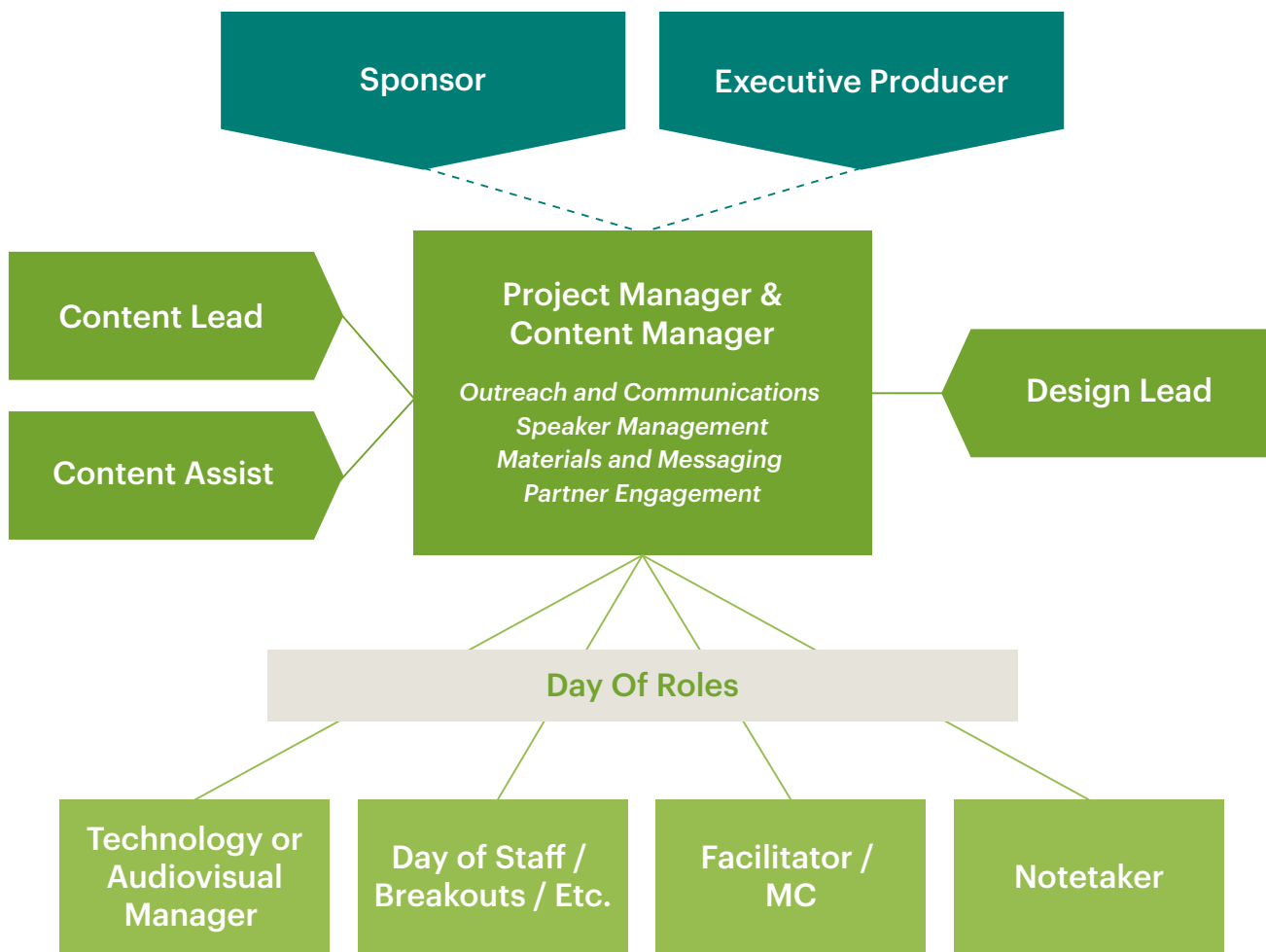
1. Offer an opt in to a 1:1 pairing after conveninings.
2. Create a newsletter to share following the convening, which might share: (i) resources mentioned during the convening and (ii) news/opportunities about participants/ participating organizations, which might be sourced via a simple survey form at the end of a convening.
3. Gather the group together again within one month post the convening. This is an opportunity to maintain momentum and check-in on action, next steps, and open questions.

There are plenty of technology tools to link community members. However, these tools may require a **point person to keep the conversation going.**

Sample Tools

- Slack Channel
- Facebook or LinkedIn Groups
- Crowdsourced reading lists on Google Docs
- Quarterly Newsletter
- Group Email Coordinator

TEAM ORGANIZATION CHART



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.

➔ Refer to the **Convening Production Guide** to apply your design strategy to the execution of a successful convening.

WITH SPECIAL THANKS TO OUR CONTRIBUTORS

