

"CONVENING TITLE"

DATE, 2023

CONVENING PURPOSE

The purpose of why you are gathering this particular group of people at this moment in time. Keep this brief! The more concise, the clearer it will be for your participants.

PARTICIPANT ROLES

Participant “types” will each play a specific role in advancing the goals of the convening. Complete the table to align and communicate expectations to those in the room.

Participant Type	Role at Convening	Role Post-Convening

Bellagio Center Convening Modules

This section outlines the common challenges nearly all Bellagio Convening organizers experience and the tools available to address them. We strongly encourage you to build these five signature tactics into your convening agenda, as they have been developed to leverage human centered design, behavioral science, and experience designing dozens of Bellagio convenings. Simply copy / paste the activity and rationale into the appropriate moment in your agenda.

Module 1: Framing and Introductions

The Challenge: Reflect on a convening (or a meeting) in which the framing and introductions dragged on for too long. Participants may have felt restless as time that could have been dedicated to substantive dialogue ticked away. Worst of all, you likely didn’t feel any connection to others in the room despite the lengthy introductions.

The Solution and Rationale: Crisply articulate the “why” (the convening purpose) and the “ask” (what is expected of the group and of individuals). Offer a tested structure for introductions that not only maintains high energy and pace, but also invites participants to adopt a mindset suited to the convening’s purpose. Question prompts are designed with behavioral science in mind, sitting at the intersection of the personal and professional to spark connection and trust.

This module is included in the agenda template below.

Module 2: Brainstorming

The Challenge: Reflect on your own experience in breakout discussions. When your group sat down to begin, you may have been unclear on what precisely to discuss and wasted time debating the instructions. When you returned to plenary, you likely sat through a low energy series of “share backs” from each group. Insights were over synthesized and no longer useful, or simply reflected the point of view of the individual presenting.

The Solution and Rationale: Provide structure and clarity by use a mad libs style template for brainstorming in breakout groups. This ensures the small group format advances the work towards the convening’s purpose. A template also sharpens the recommendations back to the plenary, allowing the presenter to focus only on the elements that advance the dialogue.

Activity	Instructions and Rationale
Brainstorming Mad Libs Tool Complete the following template for your group’s Big Idea: The Big Idea is to _____. As a result of this idea, _____ [what will change, phrased in present tense]_____ for _____ [target population, as specifically as possible] _____. The critical challenge that this action overcomes is _____. In order to [launch / accelerate] this idea, the following is needed: _____.	We recommend printing out your mad libs template or dropping it into a shared online document that can be edited by the group. Rationale: Breakout groups often struggle with understanding the assignment and producing a clear recommendation back to the plenary. This structure anchors the group discussion in a way that advances the discussion towards the convening’s purpose.
Breakout Share Backs One person from each group is invited to respond to one of the following prompts: <ul style="list-style-type: none">• What is one key learning or reflection you are taking away from the conversation?• What is one thing you will do differently in your work based on what was discussed? After, the facilitator leads a group discussion.	Alternate: Put names in a hat and randomly select the participants who will present. This democratizes the process and keep energy high through an element of surprise. Rationale: One of the most common mistakes is over-synthesis, resulting in repetitive and generic share backs. Selecting a single insight or action helps participants internalize a unique takeaway.

Module 3: Taking a Pause

The Challenge: Consider your experience in a convening where energy emerged around an unexpected topic, yet the organizer stuck rigidly to the agenda and participants left with a feeling of wasted potential. The work likely suffered from a lack of momentum afterward.

The Solution and Rationale: In addition to agenda flexibility, it’s critical for the organizing team to align on which emergent topics will be incorporated and how. Include a team check in cadence in your agenda (at minimum once daily) to evaluate how to best proceed in service of your purpose. Use this moment to offer participants a pause too, inviting them to walk the grounds in pairs while discussing a question prompt that sparks their imagination of the future.

Activity	Instructions and Rationale
<p>Participant Pause</p> <p>Future Walks</p> <p>Ask participants to pair up and go on a 40-minute walk. Invite the pairs to discuss the following prompts: Imagine what the future could be if the convening succeeds or fails. Look ahead to 2040</p> <ul style="list-style-type: none"> • How will the world change if the convening purpose is achieved? What if it's not? • What does it feel like to walk the grounds? • What topic area are you convening on in 2040? • Who else are you engaging with at Bellagio in that convening? Why are they there? <p>Ask participants to return in 40 minutes. Spend 20 minutes in plenary discussing the results.</p>	<p>Rationale: By allowing participants to align on a vision of the distant future, we do not change the state of play and we allow the participants to better unify around a basic next step. It also allows participants to unite over a fun diverting, yet philosophically intriguing prompts, opening up creativity and excitement.</p> <p>Additionally, participants begin forging one on one relationships, which ultimately leads to the cohesion and effectiveness of the group.</p>
<p>Organizer Pause</p> <p>The organizing team should meet at minimum daily and reflect on the following prompts:</p> <ul style="list-style-type: none"> • First revisit the convening purpose statement • Are we moving towards our purpose? What if anything is getting in the way? • What has emerged that we weren't expecting? • What upcoming agenda topics continue to serve us in achieving our purpose? What might we change based on what's shifted in the room? • How will we update participants on these changes and set expectations? 	<p>Rationale: Unexpected topics emerge in 100% of convenings – failing to adapt risks dragging down the energy in the room and turns participants off from engaging post-convening. Plan ahead for how the organizing team will adapt while keeping the purpose in focus by building a pause into the agenda.</p>

Module 4: Action Planning

The Challenge: Bellagio Convening survey data indicates a strong correlation between participant clarity on "what comes next" and a convening's overall success. Yet, one of the most challenging moments is the pivot point between generating ideas and moving them forward.

The Solution and Rationale: A light structure and crisp strategic questions can produce the clarity required for post-convening action. Help participants imagine the future in three critical categories – visioning the end state of desired change, articulating what stakeholders must be involved, and mapping key milestones required to achieve the goals. We recommend dividing the group into three and assigning one category each. This creates space for all voices to contribute while ensuring small group work is additive towards the larger purpose.

Activity	Instructions and Rationale
<p>Action Planning Tool Send participants into breakout groups to answer the following questions. Assign each group one category of questions and provide a template to capture responses.</p> <p>Vision</p> <ul style="list-style-type: none"> • Envision end state - what changes if this action takes hold? • Who is the target population / audience / beneficiary? What will be different for them if this initiative succeeds? • What would the 1-2 biggest challenges be to progress? • How do we keep this community together? <p>Stakeholder Engagement</p> <ul style="list-style-type: none"> • Who needs to be influenced to effect change? • Which organizations should participate? In what capacity? • What partner organizations are best positioned to work closely? • Outside of those in this room, who should be involved? <p>Journey</p> <ul style="list-style-type: none"> • On what timeline will this action effect change? • What kind of funding might be needed? • What moments or milestones can we leverage? • What is the right next step for us to take in the next 30 days? 	<p>We recommend printing out your action planning tool as a worksheet or dropping the questions into a shared online document that can be edited by the group.</p> <p>Rationale: Survey data strongly indicates that Bellagio convenings are most effective when participants leave the Center clear on specific next steps for the group and as individuals. Build a shared understanding of what comes next, which stakeholders will be involved, and how they'll engage to maximize the chance of realizing action – not just inspiration – post-convening.</p>

Module 5: Closing and Commitments

The Challenge: Have you ever left a convening feeling inspired, but not quite sure how to engage with the work after you left? Despite the energy many participants feel leaving Bellagio, they often become consumed by existing priorities shortly after returning home. The lack of clarity impedes their ability to remain involved in the work post-convening.

The Solution and Rationale: Invite participants to reflect on how they might support the work moving forward by building time into the agenda for reflection. This offers both you and them clarity on how the work will be advanced (and by whom) after the convening ends, giving you a greater chance of momentum and post-convening action.

We recommend selecting one of the three options outlined below.

Activity	Instructions and Rationale
<p>Requests & Offers Walks</p> <p>Pairs walk the grounds and discuss select prompts:</p> <ul style="list-style-type: none"> • How might you continue to be involved in the work discussed this week? • What commitments are you willing to offer? • What will you need to stay engaged? 	<p>Rationale: This activity balances reflective personal commitment and shared accountability to the group. A walk lowers the intensity of a commitment conversation yet increases the likelihood of follow through by verbalizing possible actions to a partner.</p>
<p>Personal and Collective Action</p> <p>Individual Reflection</p> <p>Participants are asked to reflect on what they can do individually and collectively to advance action, in response to the following prompts</p> <p>1. An action I will take following this convening is _____. The first step is _____.</p> <p>2. A person I hope to collaborate with following this convening is _____. I will initiate the collaboration by _____.</p> <p>3. A productive next step for this group is _____. I will contribute to that by _____.</p> <p>Group Share Out and Action Wall</p> <p>In turn, each participant chooses one card to share with the rest of the group. After participants share, their cards are collected and posted on the wall. Participants are encouraged to look at the wall before leaving the room and complete at least one of their action steps before leaving Bellagio.</p>	<p>Format: Individual Reflection</p> <ul style="list-style-type: none"> • Give participants three note cards and ask them to fill in the blanks with the question prompts. (One question per card.) • Project a slide at the front of the room with the questions. Play music to keep energy high. <p>Rationale: Before participants go back to their day jobs, give them the opportunity to reflect on what they might do differently based on what was learned at the convening.</p> <p>Format: Group Share Out and Action Wall</p> <ul style="list-style-type: none"> • Invite participants to present one of their actions, until everyone has shared • As participants share, collect the cards and post them on a whiteboard. <p>Rationale: Giving participants choice improves comfort levels in voicing an action to the group.</p> <p>Note: Ensure to coordinate required materials with your conference coordinator.</p>

Consent-Based Decision Making

Use a consent-based decision-making process to get to a “safe to move forward” shared declaration.

- **Propose:** One person shares a proposal for a declaration - ideally on screen or printed so everyone is looking at the same thing.
- **Questions:** The rest of the group asks clarifying questions about the proposal.
- **Reactions:** The entire group shares their reactions/edits to the proposal in a round (sharing one at a time, while the proposer listens and takes notes).
- **Break:** Take a 30-minute break to allow the proposer to integrate ideas and edits.
- **Revise:** The proposer shares what they heard and makes edits the proposal.
- **Consent:** Ask each member of the group if this is “safe to try” (i.e., move forward and share with others beyond this room, knowing we will learn by using it). This is also a time to name objections or block if any person does not feel the proposal is “safe to try”
- **Celebrate:** Once all objections and edits are incorporated, celebrate the creation of this shared declaration!

In the *questions* round: Call on people to ask questions one at a time and for the proposer to respond. Gently nudge the group if their questions are moving into reactions.

In the *reactions* round: Lead a round for each person to share one at a time. You might use a timer to gently nudge folks to stop once they've reached the 2-minute limit.

In the *revise* step: Guide the proposer to share edits and remind the group this is not a time for cross talk or sharing additional edits.

In the *consent* round: Call on people asking, “is this safe to try or do you object?” If there is an objection, probe to understand the objection and ask the objector to make an edit to the proposal that would make it safe to try. Remind folks our goal is to leave this session with a decision.

Rationale: The goal of this is not to reach consensus- because there will never be a declaration that everyone agrees is “perfect.” Instead, our goal is to reach a “safe to try” decision knowing we will learn by taking the statement or decision out into the world.

MODERATOR AGENDA

Day 1 Purpose Statement: <Articulate a purpose statement for the day that serves as a north star in shaping the agenda and in communicating to participants what's expected of them.>

Time	Activity	Instructions and Rationale
	Arrivals	
1:00-2:00pm	Lunch	
3:00-4:00pm	Welcome and Introductions Framing Opening sessions should be kept brief and clearly answer two fundamental questions about the convening - the “Why” and the “Ask”. <ul style="list-style-type: none">• Why we are here?• What are we asking of you (as a group and individually)?	Rationale: The early hours of the convening set the tone. If participants are not clear on their role and engaging in dialogue early, they are unlikely to do so later. More importantly, if they are not engaged at Bellagio, they are unlikely to take action afterward.

	<p>Full Room Introductions Round</p> <p>Share the following prompts on a slide and invite each participant to respond in 60 seconds or less:</p> <ul style="list-style-type: none"> • What is your name? • Where are you coming from? • What do you hope to contribute to this convening? <p>Choose one of the following prompts:</p> <ul style="list-style-type: none"> • For Presence: What motivated you to attend this gathering? • For Connection: What was an early moment that inspired your interest in [CONVENING TOPIC]? (Perhaps a moment in childhood, a book, a professor, or personal experience) • For Curiosity: What is a topic or challenge that you've been dedicating a lot of brain power or energy towards lately? • For Openness: When was the last time you changed your mind? <i>OR</i> What is something you believe now that you didn't believe 10 years ago? 	<p>Model sharing a response first. If participants go over time, gently remind them we'll have more time to connect in our next activity. We need to stay within time constraints to hear from everyone.</p> <p>Rationale: These questions are all designed to begin developing the trust that is required to achieve a successful convening and follow-on action. The question on motivation is an invitation to reflect and be present. The prompt on an early moment inspiring interest invites participants to see one another as people first and professionals second. Asking about a top-of-mind challenge invites participants to follow up one on one based on interest. The question on changing minds reminds participants that they've shifted perspectives in the past – so why not now.</p> <p>Bonus: Return to these questions prompts during the week, sending participants on paired walks or on a group walk into town for some gelato.</p>
4:00-5:00pm	<p>Confirm Departure Travel Details</p> <p>Please ask all participants to confirm departure details with the Conference Coordinator to ensure seamless travel.</p>	<p>Rationale: The transport information requires finalization with taxi companies and other partners by mid-day the first full day of the convening.</p>
7:00-7:30pm	Cocktails	
7:30-8:30pm	Welcome Dinner	

Day 2 Purpose Statement: <Articulate a purpose statement for the day that serves as a north star in shaping the agenda and in communicating to participants what's expected of them.>

Time	Activity	Instructions and Rationale
8:00-9:00am	Breakfast	
	<p>Title</p> <p>Subtitle or session leader</p>	

	Section description, guiding questions, and main takeaways <u>Facilitator Notes:</u> Add here if needed	
1:00-2:00pm	Lunch	
5:00-7:00pm	Break	
7:00-7:30pm	Cocktails	
7:30-8:30pm	Dinner	

Day 3 Purpose Statement: <Articulate a purpose statement for the day that serves as a north star in shaping the agenda and in communicating to participants what's expected of them.>

Time	Activity	Instructions and Rationale
8:00-9:00am	Breakfast	
	Title Subtitle or session leader	

	Section description, guiding questions, and main takeaways <u>Facilitator Notes:</u> Add here if needed	
1:00- 2:00pm	Lunch	
5:00- 7:00pm	Break	
7:00- 7:30pm	Cocktails	
7:30- 8:30pm	Dinner	

Day 4 Purpose Statement: <Articulate a purpose statement for the day that serves as a north star in shaping the agenda and in communicating to participants what's expected of them.>

Time	Activity	Instructions and Rationale
8:00- 9:00am	Breakfast	
	Title Subtitle or session leader	

	<p>Section description, guiding questions, and main takeaways</p> <p><u>Facilitator Notes:</u> Add here if needed</p>	
	<p>Burning Questions Leave flexible time for participants to surface and discuss topics that remain “burning questions” for them on the last day of the convening. This should be planned the first half of the last day.</p> <p>Open time allows for organizers to fit the agenda to the purpose on the last day, based upon critical topics that emerge and the evolution of discussion throughout the convening. (This happens at 100% of Bellagio convenings!) Participants have space to surface and work through any questions or concerns they have about taking action post-convening.</p>	
1:00-2:00pm	Lunch	
5:00-6:30pm	Break	

6:30-7:00pm	Convening Survey <i>NOTE: Please include something on the final day related to measurement and evaluation. How will they know the convening was successful? How will they continue to engage participants beyond their time at Bellagio?</i> <i>The Rockefeller team will be sending a survey and post-convening report template on the penultimate day. We encourage you to recommend design tactics for the final day that include the completion of these required materials.</i>	
7:00-7:30pm	Cocktails	
7:30-8:30pm	Dinner	

Day 5

Time	Activity	Instructions and Rationale
8:00-9:00am	Breakfast	
By 8:30 am	Room Checkout	
By 10:00 am	Departure from Bellagio	