



Convening Strategy & Design Practice

Realize the full potential of your gathering.

Welcome to Convening Design

We believe convenings have enormous potential to drive impact.

For decades, global leaders have come together at gatherings hosted by The Rockefeller Foundation, using convening as a tool to map the landscape of emerging fields, to forge new alliances, to discover breakthrough pathways to impact, and to accelerate collective action in addressing the world's toughest challenges.



A History of “Meetings that Change the World”

In its 100+ year history, The Rockefeller Foundation has hosted convenings that changed the trajectory of entire fields.



Global Impact Investing Network

The term Impact Investing was coined during two convenings, in 2007 and 2008. In the years following, the concept exploded with the result to date being \$1.164 trillion of impact capital allocated.



Gavi, The Vaccine Alliance

In 1999 a convening led to the creation of what's now Gavi, which provides vaccines for almost half of the world's children, has created 600+ vaccines, and provides global vaccine stockpiles for health security.



Consultative Group on International Agricultural Research

The founding of what's now CGIAR was the result of a series of five convenings across 1969-1971. CGIAR has spent upwards of \$60 billion on research to transform food, land, and water systems.



Self Employed Women's Association

A 1995 convening was a critical step in SEWA's work to secure legal status and protection for street vendors. It led to "The Bellagio International Declaration of Street Vendors" as groundwork for an international movement.



Global Energy Alliance for People and Planet

In 2021, a convening led to the GEAPP coalition's official launch at COP26. This represented \$10 billion committed to end energy poverty while ensuring a just energy transition through renewable energy access.

Why Engage in a Convening Consultation?

Many convenings never achieve their full potential.

We've all attended a gathering where participants were distracted or disengaged. Where we didn't connect meaningfully with the content. Where there was a missing crackle of energy between the participants.

Convening strategy and design can bridge the gap.

Design enables a convening to achieve its full potential in the moment. More importantly, it creates the greatest chance of achieving a long tail of impact afterwards. Our design support is intended to help you achieve the full potential of your Bellagio convening by sharpening your focus on a single purpose and crafting a structure that delivers a meaningful participant experience.



How We Support Convening Success

- **Strategy**: Strategy consultation to identify and architect convening opportunities that uniquely advance programmatic goals.
- **Journey Building**: Journey development to build a strategic plan and “theory of change” for a series of convenings that moves a programmatic priority forward in collaboration with partners and coalitions.
- **Agenda Design**: Design to build engaging and impactful convening agendas that are anchored on a specific purpose.

Early Results are Promising

Post-convenings surveys indicate that convenings receiving strategy and design support have higher evaluation scores, including on:

- Clarity of next steps
- New and meaningful connections
- Post-convening action



How Design Generates Better Results (1/2)

Strategic design maximizes the impact of a convening.



1. Design builds clarity and confidence on “what comes next” by defining the arc of the work, how each milestone uniquely moves it forward, and what role stakeholders will play.

2. Design transforms interested parties into committed coalitions by creating a memorable shared experience that forges trust and sustains the work.

3. Design advances the work further than what is otherwise possible by eliminating ambiguity and providing a structure frame for achieving success.

4. Design enables bridging across difference by encouraging and supporting creative tension.

How Design Generates Better Results (2/2)

Tactical design realizes the full potential of gathering a particular group of people, in a particular moment.



5. Design keeps participants present and energized by centering real human learning and communication styles.

6. Design provides an objective sounding board for strengthening thinking on the best use of a convening to achieve a strategic goal.

7. Design creates alignment among critical stakeholders by surfacing and resolving divergent perspectives among the planning team.

8. Design builds capacity and confidence to adapt in the room by sharpening the “north star” and providing tools to constructively change course.

Testimonials

What conveners have to say about the impact of design on...

...on the power of a sharp purpose:

"Your purpose statement just eliminates the fluff and the ambiguity of what you're trying to do. If you can't say it one sentence, then you're not going to be effective."

-**Andrew Sweet**, The Rockefeller Foundation

...on securing stakeholder commitments:

"Getting buy-in was what I had been worrying about for a year. And I got it [at the convening]. Now, we just have to do the work. That's no problem."

-**Alia Malik**, Better Cotton

...on building and sustaining coalitions:

"We were able to create energy, which built the coalition that has sustained our work. An asset was built that we can draw on over time."

-**Claire Qureshi**, The Helena Project

...on advancing towards strategic goals:

"We would have been stuck on the challenges and pushed less into actionable next steps. The design team said we need to get here - giving me that marker to go for was important."

Resources & Examples

Getting Started

Begin realizing your convening's full potential today.

Access these resources at: <https://www.rockefellerfoundation.org/bellagio-center/why-convening-design/>

Take the First Step

Reflect on your convening purpose and participant experience.

- Complete the Convening Design Blueprint form

Convening in Bellagio

We ask that you continue the “gold standard” Bellagio Center tradition by using the available design templates.

- Participant Agenda and Bios
- Post-Convening Brief
- Moderator Agenda Template

Additional Resources

Access design and production resources available to all conveners.

- Convening Design Guide
- Convening Purpose and Tactics Worksheets
- Facilitation Guide
- Virtual Participation Guide
- Project Management Template and Convening Production Guide

The Rockefeller Foundation Design Team

Who you might engage with through the consultation process.

- **Marlee Margolin**, *Design Practice Lead*: Oversees convening design at The Rockefeller Foundation, including managing the consulting team and integrating learning across the portfolio.
- **Sarah Geisenheimer**, *VP Convenings & Networks*: Leads Convenings and Networks at The Rockefeller Foundation, including the design practice and Bellagio Center programming.
- **Convening Design Consultants**: Team of expert designers who support organizers on individual convenings.

Convening Typologies (Illustrative)

A common language around a convening's purpose is critical for aligning all stakeholders, identifying the resources required to convene effectively, and moving groups towards an intended outcome. In architecting a theory of change, purpose typologies provide the scaffolding for strategically sequencing and resourcing convenings for maximum impact.

Strategic Convening Typologies:



Map a Landscape: Diverse stakeholders uncover the nature of a complex problem, build a shared understanding, and ideate on potential opportunities.



Forge Alliances: Groups or individuals build relationships and foster collaboration and support.



Discover a Path Forward: Engaged groups or individuals consider a specific challenge or opportunity and decide how to address it.







Accelerate Action: Members of an existing coalition or partnership refine a plan of action and/or secure resourcing commitments.

Other Common Convening Typologies:

- **Share Learning:** A host delivers content, knowledge, and insights for participants to enhance their practice.
- **Invite Learning:** Divergent perspectives gather to help the host to learn and expand their thinking on a problem. The host leaves with new insights and ideas for their work.
- **Amplify a Message:** Partners gather to launch, promote, and celebrate a new initiative, organization, or coalition. Participants carry the message forward.
- **Leverage a Global Moment:** Build on a milestone in the global development agenda to publicize a strategic priority.

Tax Policy Convening Journey

North Star Purpose: Align disparate stakeholder groups around a common vision for a better tax landscape for working people, and to forge new relationships that enable collaborations focused on impact in 2024-2026.

June 2022	August 2022	October 2022 (Bellagio)	Implementation Meeting	OUTCOME
PURPOSE Create a forum for listening , map a landscape , build relationships .	PURPOSE Acknowledge shared purpose and move toward shared vision + strategic areas of focus .	PURPOSE Confirm strategic areas of focus and develop a plan for each.	PURPOSE Actualize the plan for implementation toward the 2024-2026 shared vision	If we're successful, we will have achieved: <ul style="list-style-type: none"> EEO Outcomes: <ul style="list-style-type: none"> EEO grantees aligned on vision Clarity of direction for the body of work DRAFT PLACEHOLDERS: <ul style="list-style-type: none"> # partnerships formed # tax policies passed that are aligned with the group's the shared mission \$ or % cost savings to average working family # political leaders directly influenced Formation of an ongoing strategy for collaboration
PARTICIPANTS ~50 people across a range of stakeholders	PARTICIPANTS Options: (A) June convening participants, (B) subset of June participants	PARTICIPANTS TBD based on June/Aug	PARTICIPANTS TBD	
REQUIRED INPUTS <ul style="list-style-type: none"> Pre-event messaging Individ. Pre-work + survey Questions for discussion from conversation catalysts 	REQUIRED INPUTS <ul style="list-style-type: none"> Kitchen-cabinet reviewed POV document for reaction 	REQUIRED INPUTS <ul style="list-style-type: none"> Pre-thinking/pre-reads to spark innovative thinking about collaborations Draft roadmap for reactions 	REQUIRED INPUTS <ul style="list-style-type: none"> Recommendations document and roadmap 	
KEY OUTPUTS <ul style="list-style-type: none"> Internal identification of committed actors, potential points of conflict, beginning of landscape document PARTICIPANT TAKEAWAYS <i>"I am more familiar with others' priorities. Now is the time to act toward a shared vision. This is the beginning of a convening series to develop a shared vision and plan."</i>	KEY OUTPUTS <ul style="list-style-type: none"> Strategy document that captures key priorities and areas of consensus. TAKEAWAYS <i>"I have a clearer picture of where we must collectively focus."</i>	KEY OUTPUTS <ul style="list-style-type: none"> Recommendations that will inform a roadmap to be developed following the session TAKEAWAYS <i>"I know how we are going to address the challenges and opportunities: what I can do, what others will do, and how we will coordinate."</i>	KEY OUTPUTS <ul style="list-style-type: none"> Agreed upon plan with clear ownership for actions TAKEAWAYS <ul style="list-style-type: none"> <i>"Working together, this is possible. I am committed to leveraging my network and organization to deliver this vision. I know the role I will play in execution."</i> 	
				
JUNE 2022	AUGUST 2022	OCTOBER 2022	NOVEMBER 2022	

Example: GEAPP

North Star Purpose: Build the buy-in, partnerships, and commitment necessary to fund and launch GEAPP.

