



Philanthropy NY
September 23, 2014

TO CONVENE OR NOT TO CONVENE

MONITOR INSTITUTE

WHAT

Is a “Convening”?

CONVENINGS ARE...

Composed of diverse stakeholders who represent a range of perspectives on a topic, often from different Organizations

For accomplishing a clear purpose (e.g., drive toward decision-making or alignment) and intended outcomes

Designed to draw on all participants to generate insight and action beyond what any single actor could achieve on his or her own

CONVENINGS ARE NOT...

Regular, internal meetings

Focused on administrative, process-related topics

Solely for delivering information or a single point of view (e.g., a training or a media event)

Is Convening the Right **TOOL** for Your Work?

CONSIDERATIONS

Can the purpose/opportunity be clearly articulated?

NO

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

NO

Can the critical stakeholders be assembled?

NO

ALTERNATIVES

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.

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

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.



TOOL

Is Convening
the Right
for Your
Work?

CONSIDERATIONS

Does the purpose/opportunity call for collective intelligence?

NO

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

NO

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?

NO

Do you need to be the primary convener?

NO

ALTERNATIVES

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.

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.

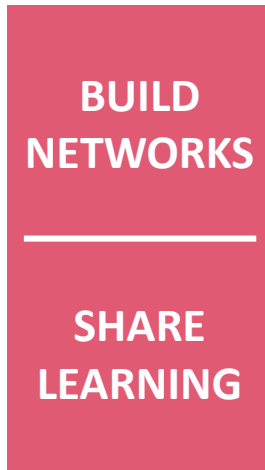
If not, hold off until you've secured ample leadership capacity and design/production team members, and consider less support-intensive alternatives for connecting the group such as conference calls, webinars, surveys, forums, or wikis.

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

DEFINING

Your Purpose

ENGAGE A DIVERSE range of participants, reflective of different facets of the problem..



ENABLE PARTICIPANTS to exchange information, expertise, and points of view.

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.

WORKSHEET

A simple way

to clarify your purpose is to answer these five questions. You may want to start with general answers, and then return later to make them more specific, as you make additional choices about your design.

“ In order to create change, this convening will help participants...

...**BUILD NETWORKS** by:

.....

.....

...and **SHARE LEARNING** by:

.....

.....

“ Beyond that, it's **PRIMARY PURPOSE** is to...

INNOVATE **INFLUENCE** **DEVELOP FORESIGHT** **ALIGN AND ACT** **OTHER**

...which it **WILL DO** by:

.....

.....

Its purpose **WILL NOT** include:

.....

.....