



# Leading by Convening

*Meeting to Co-Create Tools*

## Co-Creating Tools

One of the major challenges in learning to lead by convening is shaping traditional meetings in a new way. In the IDEA Partnership, we have evolved our meeting design to focus on shared interest and build on expertise and perspectives across groups.

Many of our meetings bring people together by co-creating materials to be used and promoted by all the partners. This strategy is transferable to the state and local levels.

This document describes how you may bring your partners together in a new kind of meeting that allows everyone to focus on content and build relationships.

### The Agenda

Convenings always begin by asking, “Who’s here?” Once you know the range of stakeholders in the room, ask the group to suggest who else needs to be here. This understanding becomes important as your group plans to move this issue forward. The following activities will begin on site and be finalized over time. This allows you to invite those who are not in attendance to become part of the process.

### Content

Scan the list of partners and the list of expert resources on the topic of interest. Often, these knowledgeable sources are found in technical assistance investments, research investments and organizational investments. Invite these key informants to join your effort and present their work. Consider the full range of key informants and be sure that your final selection covers the various aspects of the issue. Also be sure to include experts from the fields who reflect the people you are trying to reach.

### Process

#### Opening

After determining the make up of the group, make an opening statement about the topic that brings the group together. Surface the perspectives by inviting reactions to the opening statement. Facilitate and briefly summarize the perspectives that are articulated. Segue to the informational session.

#### Informational Session

Form a panel of key informants identified in your initial research. Hold an informational call with all participants to describe the purpose of the panel. Be clear that each panelist is invited because of expertise in a particular aspect of the issue. No one panelist can provide all the information needed to reach the range of stakeholder groups but, collectively, they provide a knowledge base upon which the participants will begin to interact. Invite the panelists to stay for the interaction with participants. This enables the informants to learn from the stakeholders as well as the stakeholders to learn from the informants.

Identify the information that each panelist will provide and organize the information into a coherent picture of the issue. Craft several key messages that will shape the flow of the panel. Identify a panel facilitator who can deliver the organizing messages as they move from panelist to panelist, creating bridges across content and presenters. At the conclusion of the panel, the facilitator reinforces the idea that the stakeholders present will now interact around the messages they just heard. Together, they co-create as follows. [Note: Each of these activities are further described in Appendix Six, Meeting to Co-Create Tools and Learning Activities.]

- Identify grounding assumptions about the importance of this topic. Grounding assumptions are statements with which all stakeholders agree. Where perspectives begin to diverge, grounding assumptions end.
- Articulate needs of the field. This document summarizes a shared vision as well as the knowledge, skills and dispositions needed to reach the vision.
- Develop content framework for a PowerPoint that will be finalized by a volunteer work group following the convening. The work group may decide to create a presenter's guide (see sample presenter's guide) or put helpful content and presentation suggestions in the notes field.
- Create dialogue guides around important documents on this topic identified by the stakeholders.

Prior to the meeting, solicit volunteers to lead each of these portions of the convening. Be sure that your volunteers represent the range of stakeholders. Convene the volunteers ahead of time as advisors to the event. Be sure that the volunteers understand the nature of their role. They are facilitators; they are not presenters.

## Co-Creating Tools Sample Agenda

*8:30-9:00am: Opening: Welcome and "Who's here?"*

*9:00-10:15am: Content panel*

*10:15-10:30am: Break and move to breakouts*

*10:30am-Noon: Breakouts*

- Grounding assumptions
- Needs of the field

*Noon-1:00pm: Networking lunch: Table discussion [Note: Turn in a sheet from each lunch table.]*

- Three things my colleagues would most agree with on this issue.
- One thing my colleagues would most likely question about this issue.

*1:00-1:15pm: Move to afternoon breakouts*

*1:15-2:30pm: Breakouts*

- PowerPoint outline
- Dialogue guides

*2:30-2:45pm: Break*

*2:45-3:15pm: Breakouts continue*

*3:15-4:00pm: Reconvene full group; next steps*

- Create work groups to complete the tools.
- Establish a timeline and determine the review process.
- Evaluate the convening:
  - ◆ Content
  - ◆ Process