NOW THAT YOU HAVE ESTABLISHED the purpose of your convening, the group of people you hope will attend, and how long you will spend together, you should now be well positioned to work out the highest and best use of that precious time.

We’re all used to creating simple hour-by-hour meeting agendas, but that won’t do the trick for a convening, where you need to put far more thought into the flow of the conversation. You’ll need to organize your ideas in a format that can capture the current state of your thinking, convey it to your team, and accommodate easy changes as the details evolve.

A typical solution is to create a “designer’s agenda” that describes how you will use the time from beginning to end. It is usually a good idea to describe each block of time in terms of its length, the goals you are trying to achieve in that time, and the specific methods (or activities) that you will use to achieve them.

It can be helpful to start drafting a designer’s agenda as soon as you begin developing ideas for how to use the time, creating simple outlines that are easy to rearrange. As you home in on a structure that you trust, you can then add greater detail. The designer’s agenda should cover every detail you decide about the sequence of activities.

Don’t be surprised, or alarmed, if it becomes as long and specific as the script for a movie or play. While you won’t be able to (and shouldn’t) speak every word as it’s written, writing down what you plan to say can be a helpful forcing mechanism. And when you’re wrapped up in delivering the event, having all of the process instructions written out in advance will keep you on track and your team coordinated in real time.
Experienced designers create a process they believe in but then treat it as simply a strong hypothesis, remaining open to adapting it in real time if the needs of the group develop in unexpected directions.

Follow this format to begin creating your own designer’s agenda:

<table>
<thead>
<tr>
<th>SEGMENT LENGTH</th>
<th>GOAL(S)</th>
<th>METHODS</th>
</tr>
</thead>
<tbody>
<tr>
<td>How many minutes the segment will take, and/or what time it will start and end</td>
<td>In one brief sentence, explain how the methods you describe (on the right) serve your convening’s purpose.</td>
<td>Name each action you’ll take during this segment, describe what you plan to say or include the exact talking points, and include any hand-offs if there are multiple people speaking. List any physical materials you’ll need and any changes to the arrangement of the room.</td>
</tr>
</tbody>
</table>

Next duration...  
Next set of goals...  
Next segment’s methods...
DEVELOPING AND REFINING your designer’s agenda will always be more art than science, as you work toward a series of activities that will serve your purpose with the people, place, time, and budget that you have available. As you go through that inherently iterative process with your team, there are a wide range of best practices that can help ensure that you end up with a truly co-creative gathering.

Keep participants at the center

- **FACILITATE PARTICIPANT OWNERSHIP** of the convening. Plan for how each participant can make a meaningful contribution, and design opportunities for them to start contributing early—including by providing input to the agenda.

- **SERVE MULTIPLE LEARNING STYLES** by mixing up the modes of interaction to include variation between textual and visual, analytical and emotional, creating and reflecting.

- **ENGAGE PARTICIPANTS’ WHOLE SELVES** by breaking up work that is mental and analytical with activities that are creative and intuitive such as storytelling, collage, or contemplation.

- **STEER CLEAR** of standard meeting formats (e.g. rows of tables, PowerPoint from a podium, everyone seated but the presenter) by using alternatives such as frequent breakouts, movement around multiple stations, working on flipcharts, speaking without slides, and graphic recording.

- **PLAN TO IMPROVISE**. Have a strong script but expect that it will need to be adjusted in real-time in order to meet the group’s needs. Outline fall-back plans, especially where there is uncertainty about how the group will react.

- **DESIGN FOR INTROVERTS**, so that everyone has a comfortable way to contribute. Give participants a chance to contribute in advance, provide time to think and write after new ideas are shared, design interactions around groups of three to six, and avoid cold-calling.

“YOU WANT CLARITY OF PURPOSE, BUT ALSO TO EMPOWER THE COMMUNITY TO AMEND, ADAPT, AND CO-CREATE ITS OWN SENSE OF PURPOSE.”

—CONVENING DESIGNER
Create connections

- **CREATE EXPERIENCES** that encourage new relationships to be born. For example, think carefully about who to seat together at dinner or who to place on a team. Default to diversity: only group participants with others from their organization, sector, or perspective when necessary. And encourage personal connection, such as by kicking off the first meal by having everyone turn to a neighbor and talk about a recent book they read or film they saw.

- **WHEN WORKING** on sensitive topics, invest extra time in establishing connection and trust among participants, so that there is a safe “container” for the exchange of emotionally or politically charged perspectives.

- **PROVIDE OPPORTUNITIES** and information that enable participants to connect in advance of the convening.

Pay attention to flow of the agenda

- **BALANCE** structured and unstructured time. A more co-creative design stance will require more unstructured time for one-on-one connection. You may want to leave as much as 40 percent of the time unstructured if building person-to-person relationships is a high priority and participants will be able to put it to good use.

- **BALANCE** serious contribution with playfulness, fun, and creativity.

- **REMEMBER** the importance of openings, closings, and transitions from one activity to the next. For example, when you return to plenary after a breakout, you might skip the often-monotonous round robin of report-outs and do something quicker such as asking for volunteers to share brief highlights from their conversations, or holding a fast-paced competition for the most convincing proposal.

- **WORK WITH** natural biorhythms: expect low energy first thing in the morning, after lunch, and at the end of the day. At those times, try to avoid long speeches and focus instead on interactive activities—the more talking and movement, the better.
Establish ground rules

- **DISCUSS PRINCIPLES** at the start for how the group wants to interact. For example, if part of your goal is for people to step out of their organizational roles, you could state explicitly that you would like people to speak from their personal perspective. Or, if part of your goal is open brainstorming, you might propose a ban on saying "that's impossible!"

- **ESTABLISH** how the conversation will be captured and communicated beyond the room. That begins with an agreement of how participants will share what is said, whether in real-time, via social media, or afterwards. It should also include a discussion of any organized method of capturing and harvesting the group's insights. If the conversation is sensitive, you may want to adopt the Chatham House Rule (nothing said can be attributed without permission) or declare certain segments of the agenda to be off the record.

- **SET NORMS** with participants about when and where to use computers and mobile phones during the convening. Make sure to provide adequate breaks for people to make phone calls and catch up on email.

“You have to pay attention to the fact that you’re initiating people into a new belonging, and making that belonging feel good.”

—CONVENING DESIGNER
A CONVENING IS A DANCE BETWEEN JOINING AND DIFFERENTIATION. PEOPLE CAN ONLY HAVE A JOINING EXPERIENCE FOR SO LONG BEFORE THEY NEED TO DIFFERENTIATE. AND, FOR THE GROUP TO KEEP DOING ITS WORK, THAT DIFFERENTIATION CAN ONLY HAPPEN FOR SO LONG BEFORE THERE NEEDS TO BE SOME JOINING.”

—CONVENING DESIGNER

* The concept that participation leads to divergence, and that divergence can be used productively to arrive at shared understanding, was established by Sam Kaner et al. in the Facilitator’s Guide to Participatory Decision-Making (2007). The open-to-close framework above is based on their work.

Six commonly used stages

THERE ARE NO HARD AND FAST RULES for how to structure the blank slate of your designer’s agenda. But most well-designed gatherings are structured around a particular series of stages. The event begins with connection, establishes a shared language, and then presents a divergent set of views on the topic. Depending on the convening’s purpose, that divergence may be followed by the co-creation of new ideas, convergence on a certain set of answers, or even commitment to take action.
**Connection**

**WHAT TO DO:** Welcome participants, give them the opportunity to connect with one another on a personal level, and help them establish a sense of group identity.

**WHEN IT’S IMPORTANT:** Important at every convening. Spend more time here if the group has never met, there is opposition within the group, or building networks is the primary purpose.

**SAMPLE ACTIVITIES**

- **STRUCTURED GO-AROUND:** Participants take turns sharing introductions (clockwise around a circle, tossing a beanbag, or popcorn-style).

- **GROUP TIMELINE:** Participants place themselves on a visual timeline of the group’s previous work.

- **NETWORK-MAPPING:** Visually map the relationship connections among participants.

- **STAND UP, SIT DOWN:** Have participants stand or sit in response to questions about their background.

- **HUMAN SPECTROGRAM:** Describe two opposing perspectives that form a spectrum, and ask participants to line up along it to show where they stand.

- **ASSET MAPPING:** Participants from an existing community build mutual understanding of one another’s capabilities and needs to find ways to support one another.

- **APPRECIATIVE INQUIRY:** Participants interview one another about the strengths of the community or field.

- **WORLD CAFÉ:** Participants rotate among small groups to discuss the topic, building on the previous conversation and sharing the results in plenary.

To learn more about each activity, see the list of resources listed at the end of the section.
Shared language

**WHAT TO DO:** Orient the group to the substance of the conversation—the state of play, relevant history, important facts, and other shared understanding that is foundational to the work.

**WHEN IT’S IMPORTANT:** Important at every convening. Spend more time here if participants understand the topic from very different angles, if they need to be caught up on recent changes, or if sharing learning is the primary purpose.

**SAMPLE ACTIVITIES**

- **ASSET MAPPING:** (see “connection”)
- **APPRECIATIVE INQUIRY:** (see “connection”)
- **WORLD CAFÉ:** (see “connection”)
- **FACTS AND OPINIONS:** Create a separate list of facts and opinions about the issue in order to get information on the table quickly.\(^9\)
- **JIGSAW:** Participants self-segregate into groups to discuss key themes, then re-form groups that contain at least one person from each interest group to report and reflect on their group’s ideas.\(^10\)
- **TRADE-SHOW PRESENTATIONS:** Participants split into several groups and rotate through multiple speakers.\(^11\)
- **FISHBOWL:** A small group sits in a circle and converses about the topic while participants listen—or join in by moving their chair to the middle.\(^12\)
- **SYSTEMS MAPPING:** Gather insights on the workings of a large social system, diagram them visually, and identify key levers for creating change.\(^13\)

To learn more about each activity, see the list of resources listed at the end of the section.
Divergence

**WHAT TO DO:** Give participants the space to spell out their perspectives and identify similarities and differences among them. Also, create opportunities for participants to brainstorm expansively about the topic at hand.

**WHEN IT’S IMPORTANT:** Important at every convening. Spend more time here if it is important for participants to understand one another’s perspectives in detail, or if sharing learning is the primary purpose.

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**SAMPLE ACTIVITIES**

- **HUMAN SPECTROGRAM:** (see “connection”)
- **APPRECIATIVE INQUIRY:** (see “connection”)
- **WORLD CAFÉ:** (see “connection”)
- **FACTS AND OPINIONS:** (see “shared language”)
- **JIGSAW:** (see “shared language”)
- **TRADE-SHOW PRESENTATIONS:** (see “shared language”)
- **FISHBOWL:** (see “shared language”)
- **SYSTEMS MAPPING:** (see “shared language”)
- **OPEN SPACE:** Participants volunteer to lead a discussion on a topic; others join the sessions they find most interesting.
- **BREAKOUT GROUPS:** Divide participants into small groups either to work on parts of a large task or to work in parallel on the same task.
- **RAPID PROTOTYPING:** Identify pain points, generate potential solutions, and flesh them out into plans for a testable prototype.
- **SCENARIO PLANNING:** Participants contribute a range of perspectives about how the issue could evolve in the future in unexpected ways and construct narratives of the divergent possibilities.
- **BRAINSTORMING:** Generate ideas by speaking off the cuff and treating all ideas as valid, using flipcharts and post-its in various combinations.
- **ROLEPLAYING:** Some participants take on the role of key outside stakeholders and either brainstorm or provide reactions in that role.
- **POPCORN REACTIONS:** Ask the group for quick, informal reactions to something they’ve just heard or done, to move the conversation forward without taking the time for a longer conversation.

To learn more about each activity, see the list of resources listed at the end of the section.
Co-creation

**WHAT TO DO:** Using the group’s shared language and divergent views as raw material, participants work together on one or more new outputs such as options, designs, prototypes, solutions, paths, plans, or principles.

**WHEN IT’S IMPORTANT:** Important at most but not all convenings, when there is a collective task for the group to accomplish. This is typically true when the primary purpose is to innovate, develop foresight, or align and act—but often not when it is to influence.

**SAMPLE ACTIVITIES**
- **BREAKOUT GROUPS:** (see “divergence”)
- **RAPID PROTOTYPING:** (see “divergence”)
- **SCENARIO PLANNING:** (see “divergence”)
- **DYNAMIC PLANNING:** Participants from multiple stakeholder groups provide input into a collaborative “charrette” that develops a variety of options and refines them into one that is mutually agreeable.²⁰
- **SYSTEMS MAPPING:** (see “shared language”)
- **OPEN SPACE:** (see “divergence”)
- **JIGSAW:** (see “shared language”)
- **POPCORN REACTIONS:** (see “divergence”)

To learn more about each activity, see the list of resources listed at the end of the section.
**Convergence**

**WHAT TO DO:** Prioritize and refine what has been created and note areas of remaining divergence. Build toward a shared overall understanding of the issue and develop specific options for action.

**WHEN IT’S IMPORTANT:** Important at some convenings, when there is need for participants to come away with some greater degree of shared perspective. This is typically true when the primary purpose is to influence or align and act.

**SAMPLE ACTIVITIES**

- **WORLD CAFÉ:** (see “connection”)
- **SYSTEMS MAPPING:** (see “shared language”)
- **ROLEPLAYING:** (see “divergence”)
- **BRAINSTORMING:** (see “divergence”)
- **THREE HORIZONS:** Generate or evaluate proposals under the headings of basic hygiene, new ideas for focused exploration, and novel experiments.\(^{21}\)
- **BREAKOUT GROUPS:** (see “divergence”)
- **RAPID PROTOTYPING:** (see “divergence”)
- **POPCORN REACTIONS:** (see “divergence”)

To learn more about each activity, see the list of resources listed at the end of the section.
STRUCTURING
the Flow of Activities

Commitment

WHAT TO DO: Refine and finalize the options, come to the appropriate degree of alignment and closure on the issue, define next steps for participants, and choose a method of staying accountable to these goals.

WHEN IT’S IMPORTANT: Important only for convenings that require follow-up action, typically when the primary purpose is to influence or align and act.

SAMPLE ACTIVITIES

DYNAMIC PLANNING: (see “co-creation”)

INDIVIDUAL REFLECTION ON NEXT STEPS: Participants work independently to list ideas, create a first draft of the output, or reflect on their personal next steps.

THE GRADIENTS OF AGREEMENT: Give participants a numerical scale for indicating their level of agreement and use it to measure support for each idea.

DEFINING GOALS AND MILESTONES: Place the goal and three to five milestones on a long sheet of butcher paper, then break into groups to list the steps required for each one.

SYSTEMS MAPPING: (see “shared language”)

TO LEARN MORE ABOUT EACH ACTIVITY, SEE THE LIST OF RESOURCES LISTED AT THE END OF THE SECTION.
SAMPLE ACTIVITIES: RESOURCES FOR FURTHER READING

7 Ibid, pp. 73.
10 Ibid, pp. 95, 113, 149.
11 Ibid, pp. 95, 109.
12 Ibid, pp. 95, 111, 149.
19 Ibid, pp. 95, 110, 215.
23 Ibid, pp. 278.
Many of the activities described above involve moving back and forth between plenary conversation and smaller group work. These stock designs are a good place to start, but it’s easy to move beyond them and develop your own custom approach. The basic tool to master is the template—a piece of printed material with instructions for the breakout group to follow and a place for them to capture what they produce. It is often possible to give breakout groups detailed enough instructions that they can self-facilitate, with the facilitator floating between groups to answer questions as needed. One of the most common formats for a template is a flipchart-sized sheet, that can be easily taped up over a flipchart pad sitting on an easel next to the table.

### STARTING POINTS

- **Break down the process** into simple steps that the group can understand, discuss, and complete with minimal help.
- **Be realistic** about the amount of time it will take the group to complete each step.
- **End the steps** with clear instructions on how to report out quickly, or how to create any other form of output that you expect the group to produce. When the report-outs begin, be explicit and firm about the need for brevity.
- For work in small groups, consider two template sizes: a flipchart template (approximately 25x30" placed on a flipchart that is mounted on an easel) or a tabletop template (placed on the table and sized to fit). Letter-sized templates can also be useful for individual activities.
- **Larger templates** on banner or bond paper can be useful for extended work or to capture a substantial output. These can be mounted on 4’x8’ foamcore, held up with a pair of easels, or taped to the wall if one is available.
- **Size the font** to be legible from the distance at which the template will be viewed, and leave space for large handwriting.
- **High-resolution photos** are an easy way to capture the content of a filled-out flipchart.
- **Templates** can easily be combined with large sticky notes that capture multiple answers to a question, as can be seen at the top of the example to the right.