You’ve explored the various building blocks of convening design. And if you’ve been working along with each step, you should have a fairly clear idea of what you want to accomplish. Now it’s time to step back and think about how it all fits into an integrated whole.

This is the most artful of all the steps: putting it all together. You have to build a vision for the experience you want participants to have, what they will produce together, and what activities will enable them to reach that goal. No matter how objectively important your purpose or analytical the nature of the work, the power of a convening is giving participants an emotional setting where they will be inspired to contribute their best thinking.

It helps to create a list of qualities that you are aiming for in participants’ overall experience.

What words do you hope participants will use when they talk about the event to their friends and colleagues? Try to pick three that are the highest priority, using the following as a starting point:

<table>
<thead>
<tr>
<th>Creative</th>
<th>Demanding</th>
<th>Diverse</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exciting</td>
<td>Innovative</td>
<td>Unusual</td>
</tr>
<tr>
<td>Informative</td>
<td>Enlightening</td>
<td>Cutting-edge</td>
</tr>
<tr>
<td>Thought-provoking</td>
<td>Groundbreaking</td>
<td>Provocative</td>
</tr>
<tr>
<td>Relaxing</td>
<td>Motivating</td>
<td>Inspiring</td>
</tr>
<tr>
<td>Collaborative</td>
<td>Meaningful</td>
<td>Engaging</td>
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<tr>
<td>Important</td>
<td>Productive</td>
<td></td>
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</tbody>
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What will it mean to achieve these? There is no worksheet or simple series of instructions that can make this final step easy. Your initial decisions about your purpose and design stance will establish the outlines of a vision but will not fill in the details. And your designer’s agenda can be the container for expressing that vision, but will be disjointed without it.

Two tools can help. A purpose-specific lens will help you reflect on how the broad guidelines above might apply in your particular situation, and a purpose-specific sample outline will paint a picture in broad brushstrokes of one way that you might choose to organize the group’s time together.
Purpose: **INFLUENCE**

**IF YOUR PURPOSE IS TO INFLUENCE**, you may want to consider the following additions to the general guidance we’ve given in the sections above.

**Forming your team**
- **THE FACILITATOR** and speakers must have strong credibility on the topic in the eyes of participants.
- **IF YOU ARE PRODUCING RESEARCH** or point-of-view material to share, you will need assistant designers or another appropriate team to support that work.

**Building the group**
- **THE MOST IMPORTANT** participants to recruit should naturally be the people whose points of view you are trying to shape. But also consider whether there are broader groups whose views you are trying to inform, and include people whose points of view are respected in those communities.

**THE CHALLENGE IS TO DESIGN** an experience that influences but still remains exploratory and collaborative. Choose participants who are already interested in learning more about the topic and are open to forming new views, rather than those who are already deeply committed to their perspective.

**USE SPEAKERS** to inspire and inform, not to make direct advocacy.

**YOUR PLANNING TEAM** will easily think of hundreds of potential participants who might make valuable contributions, but ideally no convening should be larger than 80 people, so that everyone has a chance to meet and the group can hold a single conversation in plenary.

**IF YOU’RE PROVIDING MATERIALS** ahead of time, use them as inputs into a conversation that will inform participants and raise questions on the topic without answering them, leaving space for meaningful conversation.

Let’s imagine that your purpose is to influence, and that you are gathering a group of 70 participants from a wide variety of backgrounds for one full day, to learn and share ideas about promising new approaches for addressing a social challenge of shared interest. The outline of your activities could look something like this:

**Connection**
- Have participants create a group timeline of when they started working on the issue, then flesh it out by adding recent key events.

**Divergence and Shared Language**
- Have four participants each give a 10-minute talk to share a range of differing perspectives on the nature of the challenge.
- Divide participants into groups of five to share reactions to the talks and develop questions for speakers to address.
- Come back to plenary, have a panel of speakers address the groups’ questions, then take follow-up questions.

**Connection**
- Let participants connect over a long lunch, allowing them to test their perspectives on the problem with people from different backgrounds.
Purpose: INFLUENCE

Structuring the work
■ LET PARTICIPANTS INFLUENCE one another by designing in both structured and unstructured time for them to hear different perspectives and form new relationships.

■ SET CLEAR NORMS for what is to be shared from the conversation. Don’t invite media if open and honest dialogue is the goal, particularly if you’re asking any participants to consider perspectives that are at odds with what they or their organization would currently state in public. Or, invite media but use the Chatham House Rule so that comments cannot be attributed in public. If you plan to share output from the event, be explicit about what will be included and excluded.

Following through
■ EVEN IF YOUR PURPOSE is not to influence action, you can still assess what people learned immediately afterwards and whether they found it useful after a period of time.

■ IN ADDITION TO NAMING what you hope to shape about participants’ own understanding and views, also map out any others who you hope they will influence in turn.

■ TO THE EXTENT that the discussion involved exploring a topic and building a point of view, make a clear promise about how that input will be used, and follow up with any updated materials that reflect it.

DIVERGENCE AND SHARED LANGUAGE
■ Repeat the morning’s format for a second round, with a second small group of speakers who share promising new approaches to addressing the problem.

CONVERGENCE
■ Break into small groups to allocate fictional “venture capital” to the ideas that were shared or other ideas that haven’t been mentioned, and then return to plenary for each group to share the rationale for its priorities.

COMMITMENT
(not necessary)
Purpose: INNOVATE

**IF YOUR PURPOSE IS TO INNOVATE**, you may want to consider the following additions to the general guidance we’ve given in the sections above.

**Building the group**
- **SPEAKERS CAN INSPIRE** the group about the potential for making advances on the issue, by sharing provocative new points of view or promising recent advances in the field.
- **NEW IDEAS** and approaches are often found by applying a concept from one specialty to an issue found in another, so participants should represent a wide range of functional expertise related to the topic.
- **THE SIZE** should be at most in the high forties, which is the largest ideal size for generative ideation where participants all have the chance to build on one another’s concepts.
- **FIND A VENUE** that can be easily transformed into a hands-on workspace. Wall space, whiteboards, or at least space for flipcharts and easel-mounted foamcore are worth having, as is space for multiple breakouts.
- **A VENUE** that is in a beautiful setting and is far away from participants’ offices is preferred, to inspire them and help them separate completely from their daily work.

**Structuring the work**
- **GIVE PEOPLE PERMISSION** to brainstorm by setting the bar for sharing a new idea to just above the floor and the bar for criticism to almost as high as you can reach.
- **NON-STANDARD FORMATS** are a must to shake people out of their daily work rhythms and encourage them to think creatively.

Let’s imagine that your purpose is to innovate, and you are gathering a group of 50 participants who are all part of an industry association. This group of people all serve similar functions in their respective organizations. They structure their work in a way that has long been commonplace across the industry, and the association has long provided a way for them to trade information and advice. The group’s aim is to develop improvements that would not only work well within their own organizations but also be attractive to others across the industry, ideally worldwide. If the event produces ideas that the association’s president considers promising, she has promised to dedicate resources to creating a pilot.

**CONNECTION**
- Have participants do stand-up/sit-downs around what they did before joining their current organization and the nature of their current role, then form a human spectogram based on how long they’ve been working in this function.

**SHARED LANGUAGE**
- Introduce the idea of innovation as a deliberate process, and explain what it takes for new ideas to spread from one organization to another.
- Share a simplified map of the commonplace workflow, created ahead of time, and check with participants for any important corrections. Then ask them to dot-vote on the stages where they see the most need for improvement. Where there are clusters, ask for volunteers to share their perspectives with the group.

CONTINUED ➔

CONTINUED ➔
LEAVE TIME UNSTRUCTURED for a substantial portion of the gathering, so that participants can develop ideas by working directly with one another.

FEW PEOPLE WILL BE CAUGHT up on promising new developments across all of the areas of practice relevant to the topic. It can be helpful to provide a landscape scan ahead of the conversation—or to generate it in the room.

Even the best new ideas are easily ignored, or forgotten, so support for their further development is critical to include in your plans. Even if you are not in a position to provide seed funding, at least consider facilitating further connection among participants who developed a new concept, and share the results of any new development with the other participants.

THE MOST IMPORTANT measure of success should be the quality of the new ideas created, as judged by your team and participants, and secondarily the extent to which participants develop them further.

Following through

Ask participants to form teams of up to eight people around the areas where they would like to innovate and feel they have something to offer, encouraging them to join groups with people they haven’t worked with before. Give each group a prepared template that guides them through the process of zeroing in on the problem, generating potential solutions, fleshing out those ideas, and prioritizing the ones with the most promise.

Returning to plenary, share the ideas that each group developed, and ask participants to re-form into groups around the ideas that they consider promising enough to prototype. Using another template, guide those groups through the process of developing the idea from a concept into a comprehensive project plan. Ask them to address details such as what resources it will require, who the end users will be, how it will overcome any barriers to adoption, and how long it will take to create.

Have each group make a case for their prototype and make a public statement about whether they would be willing and able to push it forward if it is approved for support by the president.
**Purpose:**

Let’s imagine that your purpose is to develop foresight on what social challenges could emerge for a major metropolitan area over the coming 15 years, with the aim of informing the actions of both governmental and social-sector actors. You are gathering a group of 60 participants to spend two full days developing scenarios. They represent government, nonprofits, funders, business, and other key constituencies within the city.

**Building the group**

**FOR THE CONVERSATION** to break out of the conventional wisdom, participants need to represent the full range of perspectives that exist on the topic, with higher representation of unorthodox views that challenge the mainstream. Think broadly when looking for these people, as they often hold their views because they work outside of the organizations and specialties that are most commonly considered relevant. It is by including them that you can provoke discussion about what unlikely but plausible outcomes are important to consider.

**A GOOD SIZE** range is the low thirties to high forties, so that there are enough people to represent a diversity of views but a small enough group that there can still be productive plenary discussion.

**Structuring the work**

- **CREATE** a safe space for open conversation by setting a norm that what is said at the event is not to be shared, especially if you’re asking any participants to consider perspectives that are at odds with what they or their organization would currently state in public. If you plan to share output from the event, be explicit about what will be included and excluded.

- **SINCE THE FUTURE** can never be known with certainty, keep the conversation playful and creative, such as through the use of storytelling about future possibilities. Graphic recording can be especially valuable for capturing these stories visually.

**DEVELOP FORESIGHT**

**Purpose:**

**Tying it all together**

**GATHER PAGE 73**

**DESIGN LENS**

**SAMPLE OUTLINE**

Continued

Continued
**Offer a pre-reading** summarizing the recent trends and the current state of play in the spaces that are relevant to the topic, to provide a common starting point for participants joining the conversation from very different backgrounds. The conversation about the current situation can then be much shorter when the group comes together.

**Following through**

- **Structure your assessment** around the audience you hope to influence, whether this is the leadership within an organization, leaders across a certain field, or a broader constituency.

- **The arbiter of success** for foresight work should not be its precision at pinpointing future occurrences, but rather its ability to productively inform the choices of your target audience, even if specific details turn out differently. The highest value that foresight can provide is not prediction but the surfacing of important new possibilities to consider.

**In the near term,** ask the target audience whether they found the foresight work informative and relevant for their work. Then, after half of the timeframe for the foresight has passed, check back and see whether the audience still feels the same.

**Purpose:**

**Develop foresight**

Give each group a set of cards with previously researched suggestions for each category, and ask them to use them as a starting place for creating a prioritized list of the most important items of each type.

- Coming back to plenary, compare lists, combine duplicates, and dot-vote to arrive at a final list of the most important things that may change or stay the same.

**Convergence**

- Provide ample time for the group to digest this in person-to-person conversations, then come back to create scenarios. Ask for volunteers to propose different visions for the future of the city that they would like to develop, and have participants join the team that interests them most. Have each team develop a story about what could happen to the city over 15 years, incorporating the key variables that the group identified, and share that story with the full group.

- Splitting back into groups around the new scenarios, with each person working on a different scenario than they created, have participants develop a set of implications for the different stakeholder groups. Ask each group to arrive at a clear list of recommendations for each stakeholder group, and then re-form the groups a second time to allow participants to work on one additional scenario.

**Commitment**

- Ask each of the people in positions of substantial power or influence to share their reactions to the scenarios, and (if they’re comfortable) to outline how the work has changed their view of where to focus their organization’s efforts.
Purpose: ALIGN AND ACT

IF YOUR PURPOSE IS TO ALIGN AND ACT, you may want to consider the following additions to the general guidance we’ve given in the sections above.

Forming your team

IF AT ALL POSSIBLE, the facilitator should be a person who participants already respect as a leader within the group, and who has a history with the group that puts them in a strong position to call for collaborative effort.

Building the group

SINCE THE GOAL is to have this group agree to take some degree of action together, it will need to include people who are already close to that point. This means avoiding any divisions around relative status or perspectives on the topic that are too deep to resolve in the course of the gathering.

IN MOST CASES there is a specific group that needs to take collective action. Decide who those key participants are and stick to that list. If you can’t get the right group together, don’t substitute others who are less relevant for the sake of having the event.

MAKE SURE that the people who come are in a position to take the kind of action you’re hoping for, not deputies who will have to convince their bosses.

THE MORE OF A STRETCH it will be for participants to take action, the smaller the group should be. If your goal is for the group to take a significant new step together, your total number should probably be in the teens to low twenties.

Structuring the work

INVEST IN CREATING a sense of ownership over the process among participants, making it clear that they are being treated as equals.

SAMPLE OUTLINE

Let’s imagine that your purpose is to gather a group of 25 director-level organizational leaders, each of whom is doing very similar work but on different issues, to spend a day exploring whether they have enough in common to spend time sharing information and (over time) align their strategies. You’ve selected the group carefully to include people who are likely to respect one another’s work and inclined to collaborate well in a group setting. Many in the group know each other by reputation but not personally. To kick-start the networking process, you take the time to interview each of them about their point of view and compile a briefing book that includes those interviews alongside their bios and a description of their current work.

CONNECTION

Provide the briefing book a week in advance, and bring participants together for a group dinner the night before.

SHARED LANGUAGE

After briefly introducing to the reason for the gathering, interview a speaker who you’ve selected for her prominence in doing the same type of work as other participants. Guide the speaker through a set of topics that you selected based on what you know about participants’ interests from the interviews, drawing out what problems she has solved and the tools that she used.
DESIGN LENS (CONTINUED)

- **SET ASIDE** substantial unstructured time for participants to discover and discuss ways of working together one on one, which will build their readiness to join a collective effort.

- **KEEP THE DESIGNER’S AGENDA** loose, have several backup plans, and make sure the facilitator (if it is not yourself) is ready to reshape the activities in order to help the group make progress.

- **PUT THE PROBLEM “IN THE CENTER”** by focusing the conversation on the nature of the issue at stake, so that participants build a shared perspective on the structure of the problem that they can then use as the foundation for finding a new set of solutions. This process can begin ahead of time through interviews, surveys, and even systems mapping.

** Following through **

- **STRUCTURE YOUR FOLLOW-UP** work to support whatever specific action participants have agreed to take at the close of the event. You can usually anticipate the range of outcomes but not the exact landing point.

- **WHILE IT IS TEMPTING**, avoid placing yourself in an enforcer-like role for participants’ commitments—instead, hold them accountable to one another by creating forums where progress and setbacks are visible.

- **TO THE EXTENT** that participants have agreed to any continued engagement as a group, show immediate support for moving the work forward—by acting as (or providing) the technical backbone, hosting future gatherings, or providing a network weaver.

**SAMPLE OUTLINE (CONTINUED)**

**DIVERGENCE AND CO-CREATION**

- Split participants into two to three groups around topics that you know from the interviews are on their minds, allowing them to choose the one that interests them most. Lead one discussion yourself and use co-facilitators to lead the others, encouraging the speakers to join the tables and take an active role. Let participants drive the conversations, encouraging them to share what they find challenging about that facet of their work and what tools or approaches they’ve found particularly powerful.

- Use a similar format for a second round: do a second speaker interview over lunch, then hold an open space, asking participants to propose discussions they would like to lead and breaking into groups according to interest.

**CONVERGENCE**

- Close with a final interview and then a simple plus/delta about the day, providing space for any energy for further collaboration to emerge but not demanding it if it does not.

**COMMITMENT**

- In a survey after the event, ask participants whether they would be interested in another gathering, and in how much time.