



Leading by Convening

Ensuring Relevant Participation

Engaging Everybody

Talk to a group about engaging the full range of stakeholders and predictably you hear, “We will have 200 people at every meeting.” This is a real fear, but is it a real problem?

We have found that for most issues, people want to be involved but not necessarily physically present. After a meeting or two, people sort themselves out by the way they want to be engaged. We have built on that understanding in creating this tool. By intentionally asking at which level individuals want to be engaged early in your collaboration, you can be inclusive within a structure.

This tool can be used after the first few convenings or at the conclusion of the first convening, depending on the current relationship among participants. Use your best judgment to determine how many organizing sessions you need.

Using the Circles to Define Roles

The circles (see next page) define the responsibilities so that potential partners can choose from among roles they would like to play.

The Core Team

The core team consists of leaders from diverse groups who are committed to the success of the work. Their responsibilities follow.

- Convene the group.
- Take responsibility for structuring each convening and follow up.
- Plan and monitor interaction.
- Create engagement strategies.
- Organize activities.
- Communicate with decision makers.
- Oversee review and evaluation.

Key Participants and Advisors

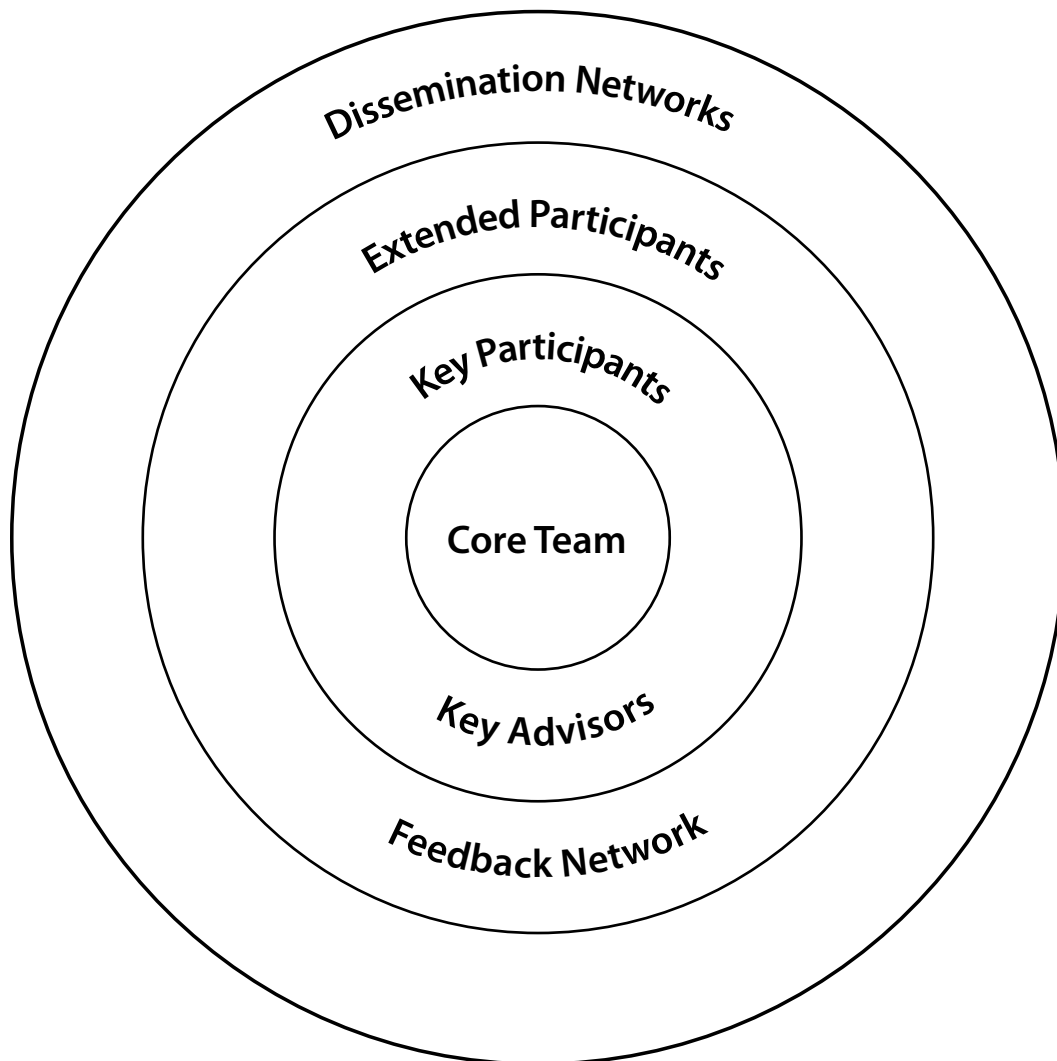
Key participants and advisors are groups that have responsibility for, or keen interest in, the issue. Their responsibilities follow.

- Act as regular contacts for information on the issue.
- Give advice and help the core team sense issues and adapt activities in a variety of contexts.
- Make opportunities for the work within their networks.
- Bring their networks into the work of the group.
- Promote the cross-stakeholder approach to problem identification and problem solving.
- Join the core team periodically when their expertise is required on a particular issue.

Extended Participants and Feedback Network

Extended participants and feedback networks are individuals who are reached through the organizations and networks that are key participants/advisors. They represent individuals who work at the practice, family or individual level. These participants have connections to the issues and to the organizations that are active on the issue. They can be a bridge between ideas as formulated and ideas as practiced. Their responsibilities follow.

- Volunteer to become involved and represent the perspective of their organization and/or network.
- Bring the perspective of their role and/or organization into the work.
- Bring important learnings back to their networks.
- Identify opportunities within their networks to showcase the learning.
- Hold both their organizational identity and the group identity while interacting with the group.
- Identify other practitioners and family members who may become active.



Dissemination Networks

Dissemination networks include participants from all the groups within the circles and all the other groups related to this issue. Their responsibilities follow.

- Receive information.
- Redistribute information through newsletters, news blasts, meetings, etc.
- Submit information from newsletters, news blasts, meetings, etc.
- Customize messages for their particular audience.

Using the Circles to Send Important Messages or Invite Designated Participation

Sometimes activities or events require decisions about strategic participation. For every message, invitation or event the core team should decide together who to notify and who to invite. These are different processes with different goals.

Core Team

The core team constructs the process for inviting and defining participation from among the active members of each group based on the issue, content, context and special considerations regarding communication and the need for contact (the Four Cs). The core team maintains a master list and customizes the list for each event based on the Four Cs.

Key Participants and Advisors—Group 1

Group 1 partners must be invited. They represent key constituencies and have the authority and/or influence to help individuals make change. All of these leaders may not be able to become consistently active on the issue, but they must be knowledgeable about the work of the group

and committed to group outcomes. They may ask to designate a Group 2 participant to represent them. Group 1 must contain a critical number of active, key leaders who constitute the core team.

Extended Participants and Feedback Network—Group 2

Although Group 1 leaders must always be included, it is important for them to redistribute invitations and information to their networks as needed. The key participants and advisors from Group 1 are often uniquely situated to identify the right person to champion an issue or strategy on behalf of the organization. Interested and committed individuals from these organizational networks form Group 2.

Communication should begin with an understanding of the value of their individual participation and their connection to their larger network. These people are connectors and have influence with Group 1 partners. These people can help tailor messages to reach their networks. It is always good and encouraged for the Group 1 representatives to identify key leaders to join and become active participants in Group 2 who will share their organizational perspectives and bring new ideas to the group.

Dissemination Networks—Group 3

It is important to develop a number of active participants who will form Group 3. This group receives information and is asked to provide information. Group 3 participants should have enough interaction to consider themselves connected. Develop ways to actively engage Group 3. Some ideas include: webinar invitations, surveys, blogs, polls and broad inquiries.

Group 3 is important in creating both a buzz about the issue and the work completed on the issue.