

Leading by Convening:

A Blueprint for Authentic Engagement

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For the PA Care Partnership
April, 2020

Let's see who is here?

- In the **CHAT**, please sign in to let us know that you will be part of the group today.
- Please give us your name, location and role.

Welcome!

“The three most important
aspects of learning
—attention, focus, and memory—
are all controlled by our emotions,
not by cognition.”

Brackett Ph.D., M. (2019). *Permission to Feel: Unlocking the Power of Emotions to Help Our Kids, Ourselves, and Our Society Thrive*. New York, NY: Celadon Books.

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Our current reality brings daily highs and lows. Fear and sorrow mix with moments of connection, outreach and joy.

Poll 1: *Which emojis convey how are you've been feeling?*

Perspectives

Graphic: Rotem-Gal-Oz, A. (n.d.). Big Data. Retrieved June 14, 2016
<http://www.slideshare.net/arnonrgo/big-data-overview-37733627>

- What we think, feel and do are heavily influenced by what we have experienced.
- Understanding an issue demands that we seek differing perspectives.



Poll 2: Lets see what perspectives you bring to this work?

1. Family/ Youth
2. State Agency Staff
3. County Agency Staff
4. Project staff
5. Justice
6. Advocacy organization
7. Community organization
8. School District/IU
9. University
10. Other

Reflecting on Participation

- Is the participation diverse?
- Is the participation balanced?
- How will the mix influence your discussions?
- If your participation is not diverse and balanced, how will you check the assumptions (*positions, next steps, etc.*) that are based on participation?

What Can We Assume about This Group?

- A focus on improved *outcomes* for families and youth
- A *commitment* to improving behavioral health in PA
- An understanding that change means changing *systems and the people in the systems*
- An appreciation of *learning from and with others*
- A recognition that we each have *something to share and something to learn.*
- A curiosity about the *power* of engagement
- Other ...

Checking My Assumptions...

What are you hoping to learn about
Leading by Convening?

Leading by Convening (LbC) is not a program.
It is a way of interacting among people in many roles and with many perspectives who have common interests or are doing shared work.

Objectives:

At the conclusion of this training, participants will be able to:

- Describe the value of convening as a core strategy to build engagement
- Discuss three new '*Habits of Interaction*'
- Define the technical, adaptive and operational challenges in convening
- Differentiate stakeholder management from stakeholder engagement
- Recognize examples of shallow and deeper engagement
- Apply LbC principles and tools to current problems of practice

Design

- **Today: Full Day**
 - Leading by Convening Basics
 - Important Tools
- **Follow-up Sessions: 2 hours each**
 - Apply LbC tools to Practice Scenarios
 - Use LbC tools in your work
- **Monthly Peer Coaching Sessions**
 - Apply LbC strategies to current problems of practice
 - Joint problem solving using the LbC framework
 - Peer generated ideas to try
 - Guided approach to the range of LbC tools

Our Time Together: AM

- 9:00 - 9:30
 - Introductions; Today and Beyond
- 9:30 - 10:30
 - Authentic Engagement, LbC Framework
 - Content
 - Tool
- 10:30 - 11:30
 - Coalescing around and Issue
 - Content
 - Tool/Breakout
- 11:30 - 1:00
 - Lunch

Our Time Together: PM

- 1:00 – 2:00
 - Relevant Participation
 - Content
 - Tool/Breakout
- 2:00 – 3:00
 - Doing Work Together
 - Content
 - Tool
- 3:00 – 3:30
 - Measuring Progress
 - Tool/Demonstration
 - LbC Follow-through Sessions (*May – September*)

Four Questions about Stakeholder Engagement

- Who are your stakeholders?
- Why is authentic stakeholder engagement important?
- What does it look like?
- How do we make it a reality in practice?

Stakeholders: Who Are They?

- A **stakeholder** is any person, organization, social group ... or society at large... that has an interest in and can affect or be affected by an issue, decision or policy.
- **Stakeholders** can be internal or external to the issue.

The Stakeholder Landscape: Levels of Concern

- Interest In
- Affected by
- Can affect

- Internal
- External

Poll 3: Recognizing Your Stakeholders

A new local System of Care (SOC) initiative intends to start out by inviting their stakeholders into their work. Which of the following groups will be important stakeholders?

- 1. County agencies
- 2. Police
- 3. Clergy
- 4. Schools
- 5. Justice (*Magistrate, Judge, etc.*)
- 6. Community Organizations (*Social, Civic, Charitable, etc.*)
- 7. Families
- 8. Youth
- 9. Community members (*Influential members in neighborhoods or racial /ethnic/cultural communities, etc.*)
- 10. Health Providers (*Hospitals, Non-profits, etc.*)

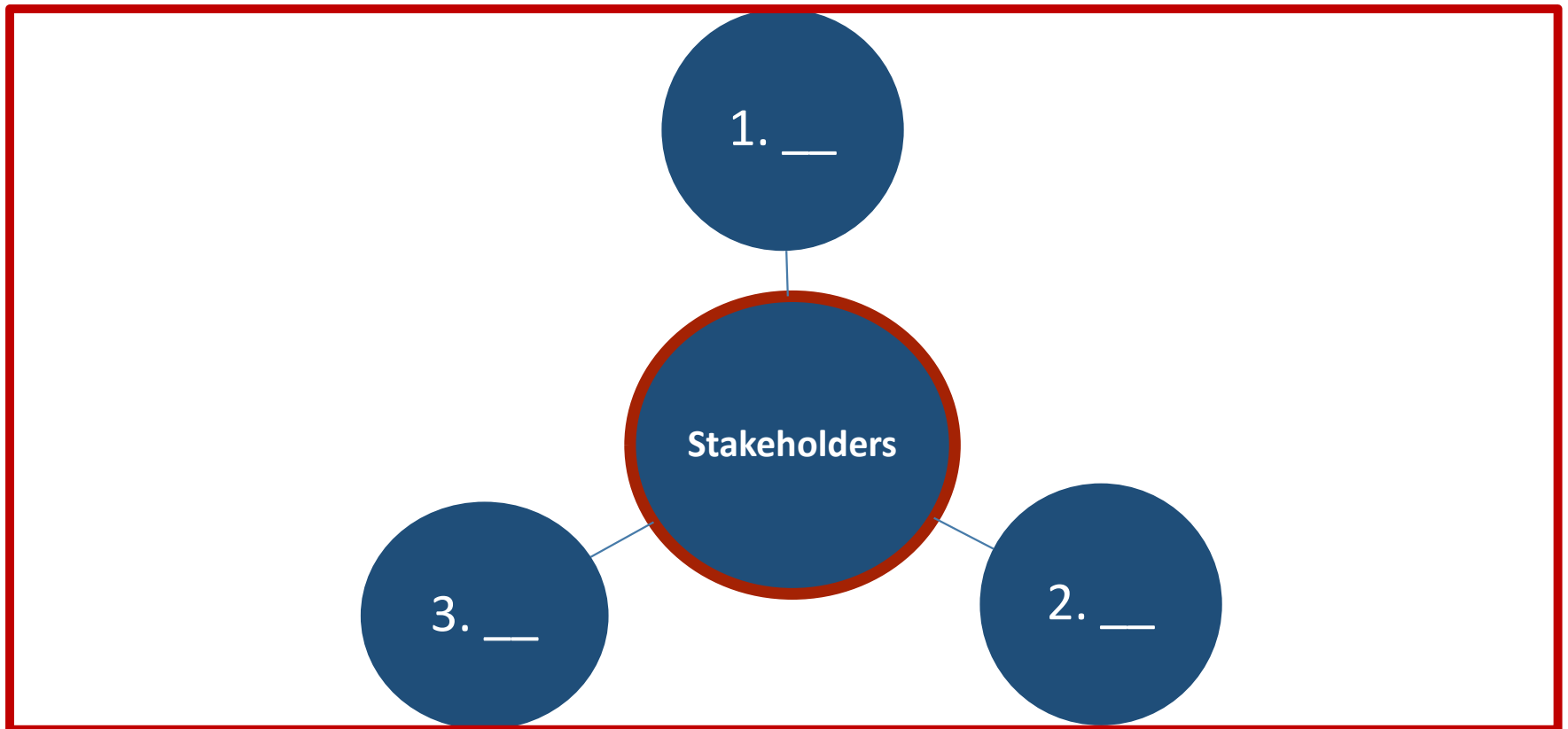
Lessons about Stakeholders from SOC Principles

Systems of Care are:

- Family Driven and youth guided with the strengths and needs of the child and family determining the types and mix of services and supports provided.
- Community based with services and systems management resting within a supportive infrastructure of processes and relationships at the local level.

Source: Sproul, Blau and Freidman (2010): Updating the System of Care Concept and Philosophy

The Stakeholder Relationship



Poll 4: The Stakeholder Relationship

In your view, what are the top three qualities in the relationship with stakeholders?

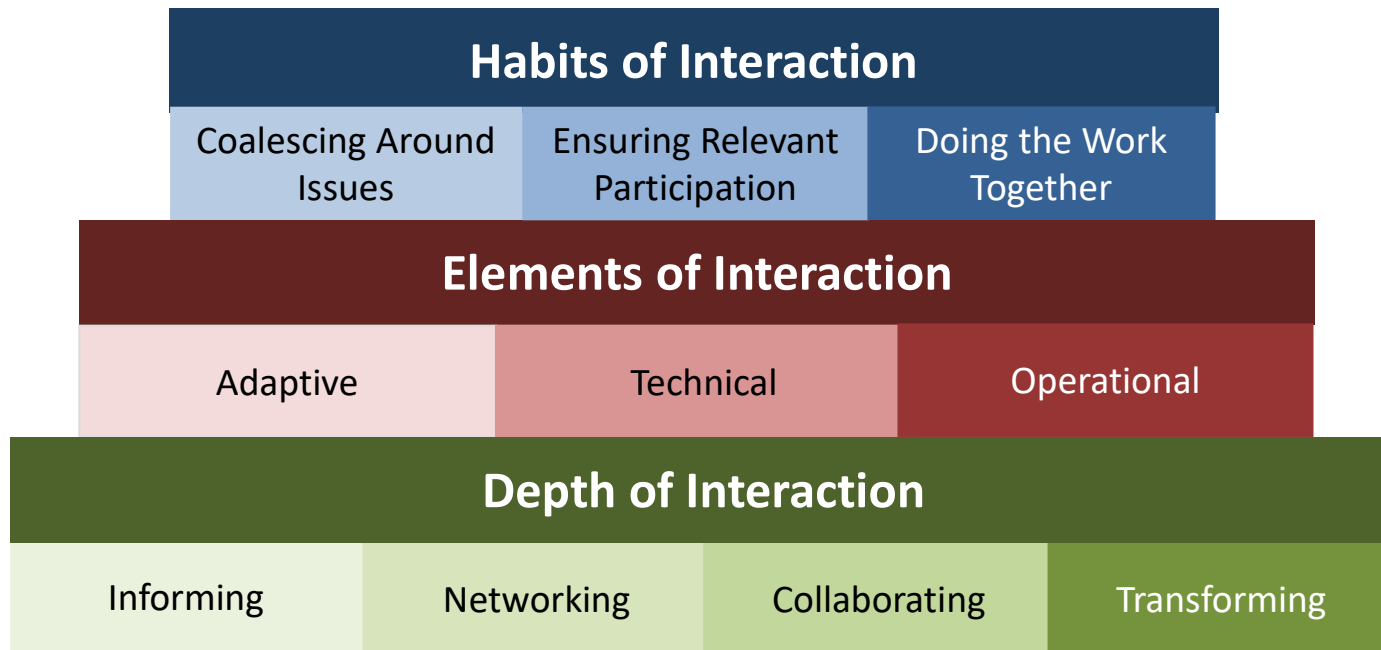
- 1. Trustworthy
- 2. Open
- 3. Allies
- 4. Informed
- 5. Active
- 6. Champion
- 7. Reliable
- 8. Candid
- 9. Supportive
- 10. Liaison

Engagement as Strategy

- *Beyond PR/ Beyond the 'checkoff'*
- *Stakeholders as Allies*
- *Habits of Interaction*
- *Convening as a new discipline:*
 - 'Teachable'
 - 'Learnable'
- *Translate work into ways that many people can participate*



Leading by Convening: A Blueprint for Authentic Engagement



Habits of Interaction

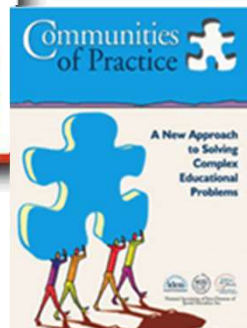
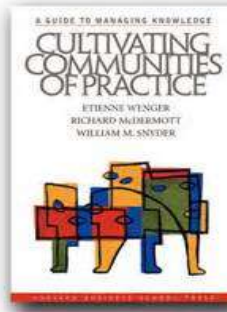
Coalescing Around
Issues

Ensuring Relevant
Participation

Doing the Work
Together

Theory Base:

Etienne Wenger
*Communities of
Practice*



Elements of Interaction:

A Convening Approach to Common Practice Problems

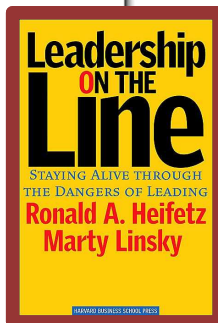
Adaptive

Technical

Operational
Decisions

Theory Base:
Heifetz and Linsky
*Technical and
Adaptive
Challenges*

Experience Base:
Stakeholders
("Pay attention to"...)

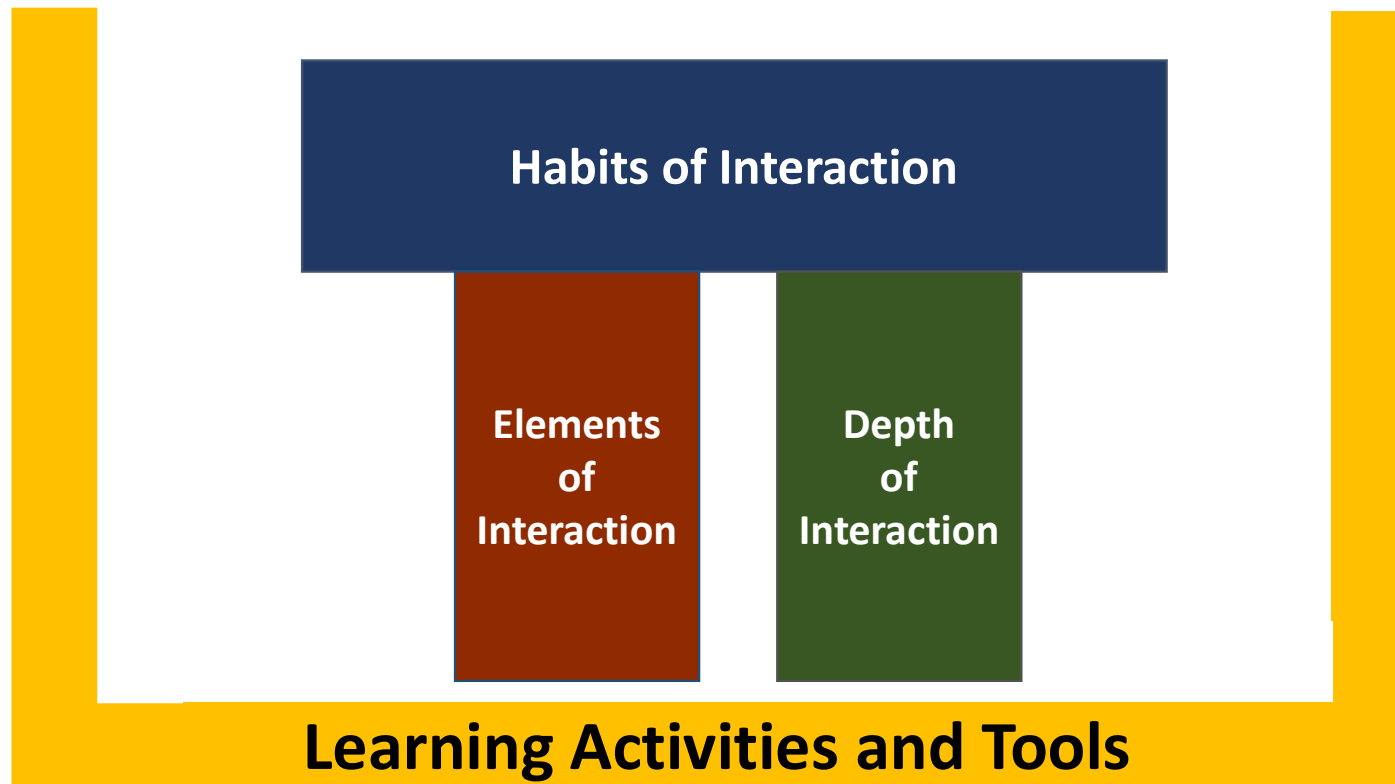


Depth of Interaction:
A convening approach to deep engagement

Informing	Networking	Collaborating	Transforming
Sharing or Disseminating; One-way	Exchanging; Two- way	Engaging; Working together over time	Committing to engagement and consensus-building

Experience Base:
IDEA Partnership

Ideas to Action

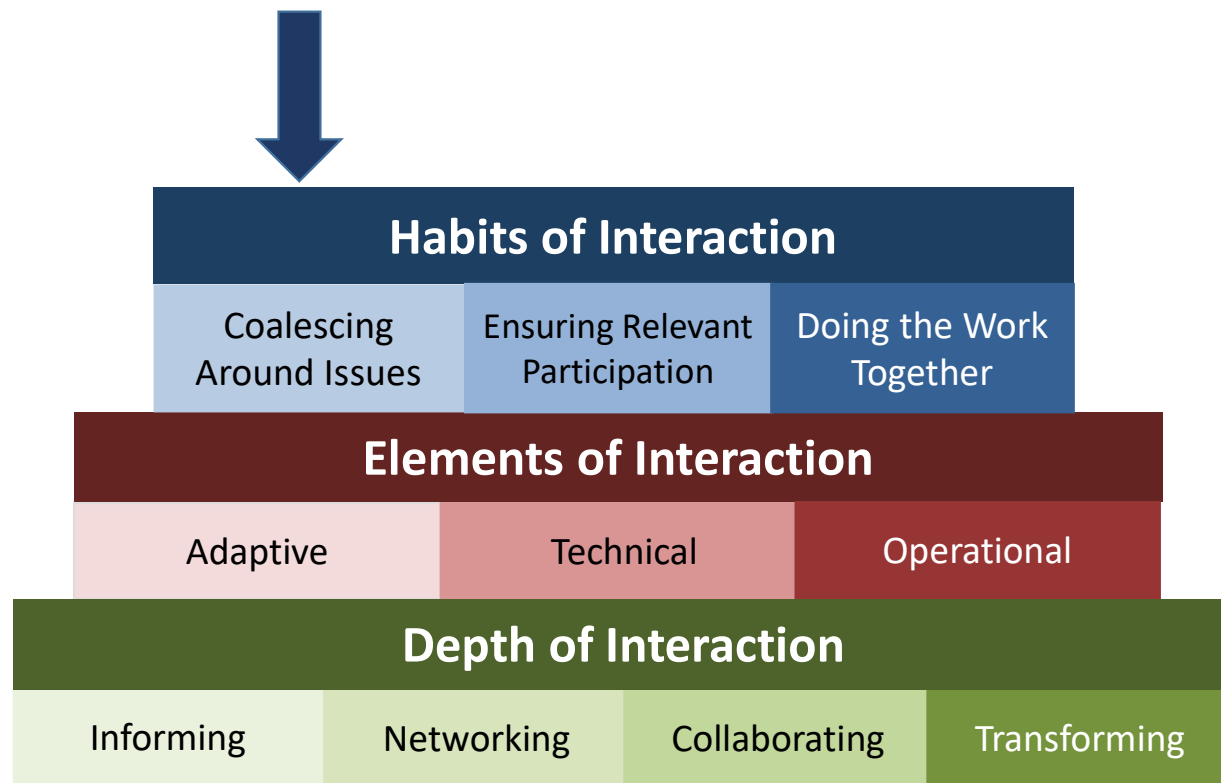


*Foundational LbC Principle:
Everybody is a leader and everybody is a learner.*

What does it mean:

- for system leaders?
- for families and youth?
- for community partners?

Habit of Interaction: Coalescing around an Issue



Coalescing: Elements Of Interaction



Technical and Adaptive: What's the Difference

Technical: *The Process Side*

- Expert Knowledge
- Formal Process
- Regulation
- Guidance
- Protocols
- Manuals
- Agreements
- Charters
- Rules

Adaptive: *The Human Side*

- Practice Knowledge/ Lived Experience
- Informal Process
- Communication
- Understanding
- Influencers
- Networks
- Perspective
- Dialogue
- Consensus

Operational Decisions:

“Pay attention to...”

A few key behaviors:

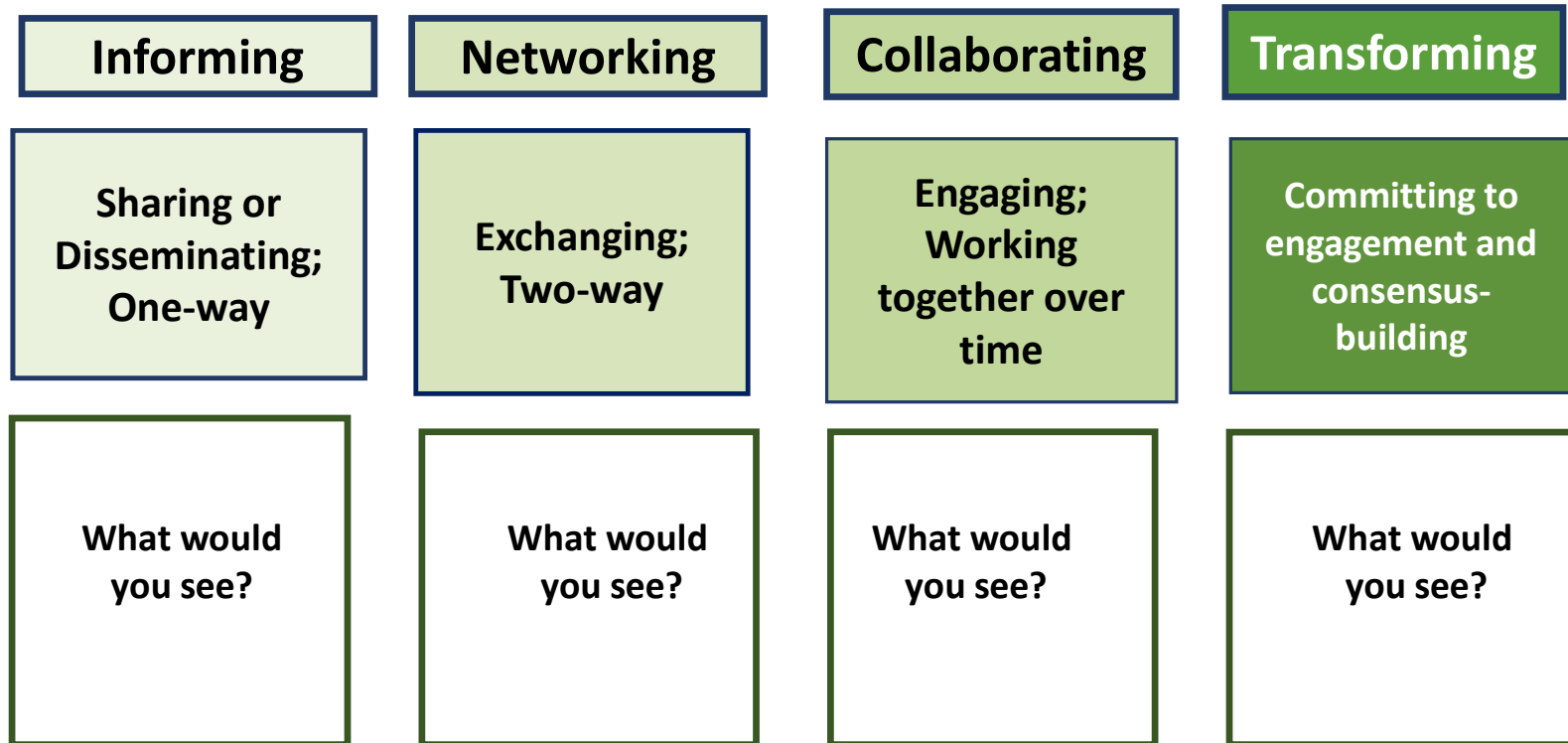
- that can make a difference
- that are observable and can be monitored
- that are viewed from the perspective of the intended beneficiaries
- that can be changed

Building a Rubric around Engagement

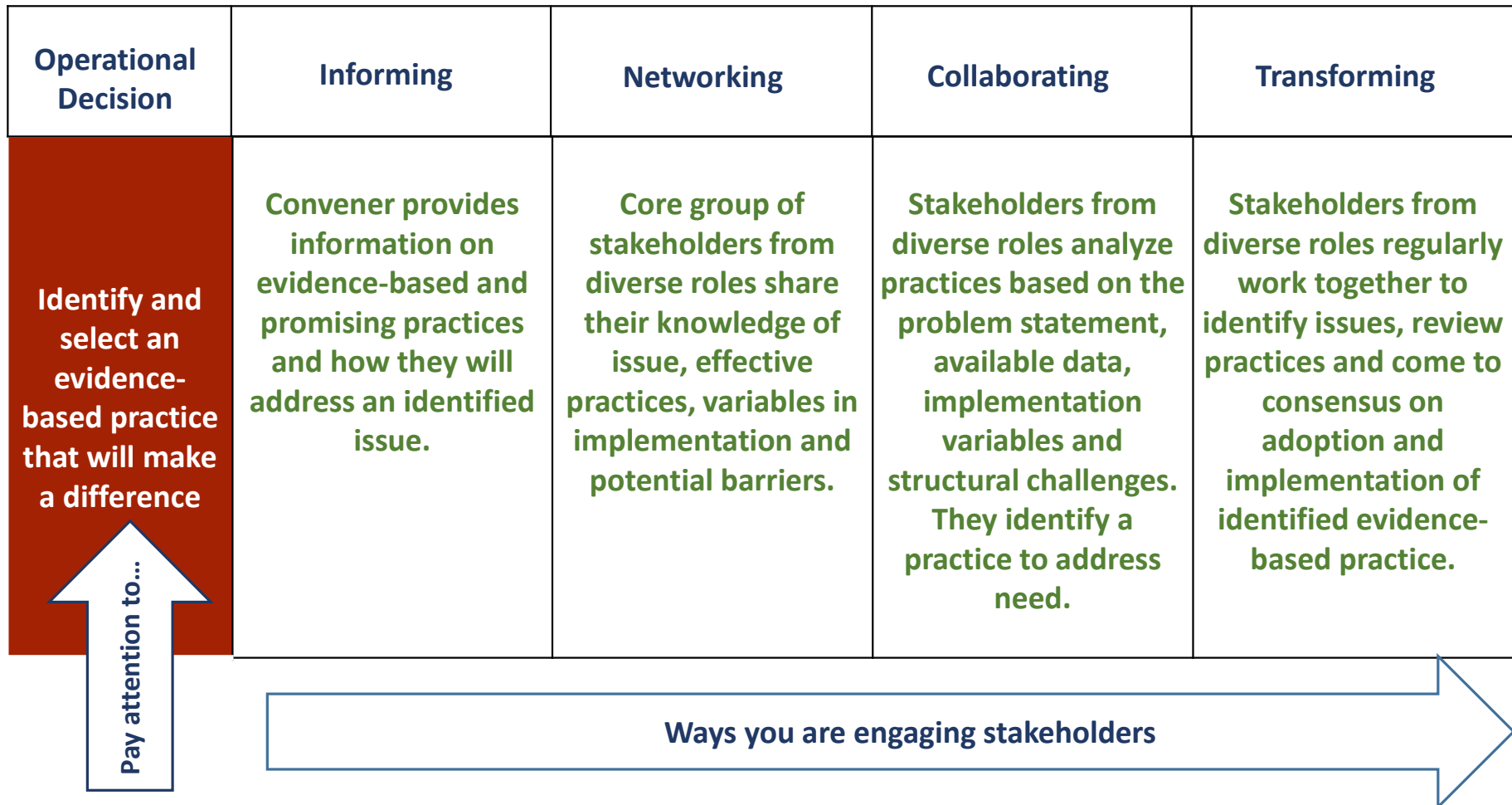
Operational Decisions	Informing	Networking	Collaborating	Transforming
How do we 'pay attention to' engagement in making and implementing decisions?	Sharing or Disseminating; One-way	Exchanging; Two-way	Engaging; Working together over time	Committing to engagement and consensus-building

Coalescing around an Issue: *Depth of Interaction*

*Your data shows that current practice is not producing outcomes.
You need to make a change. How will you engage your stakeholders?*



Let's see what the stakeholders said...



Bringing People with Different Perspectives Together

Commonality of Need

- Require similar resources, data and skill sets

Commonality of Purpose

- Aligned around a similar set of goals and objectives

Commonality of Action

- Working together on common methods and actions

LbC Tool: Four Simple Questions

- We cannot avoid complexity but we can make it less complicated.
- This tools will help you create a more inclusive path to shared work.

Using Four Simple Questions

Leading by Convening—Coalescing Around Issues

Four Simple Questions (continued)

1. Who cares about this issue and why?
Answering this question p...
Who cares...
(List by role, organization, position, etc.)

Leading by Convening—Coalescing Around Issues

Four Simple Questions (continued)

2. What work is already underway separately?
Recognizing the work of...
that others have on an is...
Organization or Group
(Note name of organization or group.)

Leading by Convening—Coalescing Around Issues

Four Simple Questions (continued)

3. What shared work could unite us?
Relationship building takes time! Shared activities make a start and lead to bigger opportunities.
Activities (Select from list)
Defining a Shared Activity
Information
Product
Joint
Me...

For All Groups? If Not for All Groups, List Specific Groups

Leading by Convening—Coalescing Around Issues

Four Simple Questions (continued)

4. How can we deepen our connections?
A single outreach won't yield much when we want to change practice; interactions must be ongoing. *Remember:* If a group is important to our outcomes it isn't any less important because it doesn't accept our invitations. Keep inviting!

Group (List identified groups.)	How can we support and connect to this group's work on this issue? (Note activity(ies) most likely to be effective.)	How can this group support and connect to our work on this issue? (Note activity(ies) most likely to be effective.)

idea PARTNERSHIP

A Practice Scenario

A group of MH leaders recently came together to discuss the unplanned and rapid switch to online communication and teletherapy.

They discussed several positives that have been reported but spent much time discussing what they may need to consider and who might need to be in the conversation. Beyond the questions of equipment and connection, they articulated other concerns including: confidentiality, privacy, language and cultural norms.

They wondered how this experience will influence practice after the statewide 'stay at home' order.

- Using the Four Simple Questions, offer your advice in bringing people together around these issues.

Breakouts

- **Breakout 1**

- Who cares about the issue?
- What might these individuals and groups already be doing around this issue?

- **Breakout 2**

- What shared work could unite the potential partners?
- How could the potential partners deepen their connections?

Breakout Reflection

What insights/ideas came from your interaction?

A Quick Check on Coalescing

Poll 5: True or False

1. Recognizing commonalities is a critical step in coalescing around an issue
2. New perspectives are not always helpful in understanding an issue.
3. Everyone can benefit from bringing individuals with different backgrounds together.
4. Coalescing around an issue is not easy.
5. People are able to change their behavior given time, tools and support (coaching, etc.)·

More LbC Tools to Help You Coalesce

Meet the Stakeholders

For every issue, there are a number of groups that have deep and durable connections at the practice level. Use this tool to reach out and identify potential partners

How People Are

Change is hard for most people. This tool will help you prepare for some of the most predictable challenges.

Seeds of Trust

Your stakeholders will take in messages about your sincerity in both direct and indirect ways. Little things mean a lot. Use this tool to identify small changes that build trust.

Lunch

Let's be back and ready to go by 1:00

Welcome Back!

Poll 6: *How are we doing on interaction?*

- More time to stop and talk with each other
- Time for talking with each other is about right.
- Too much time stopping to talk with each other.

Convening: A New Discipline

Convening is:

More than an invitation	More than a meeting
The beginning of a relationship	

Leading by Convening that means we....

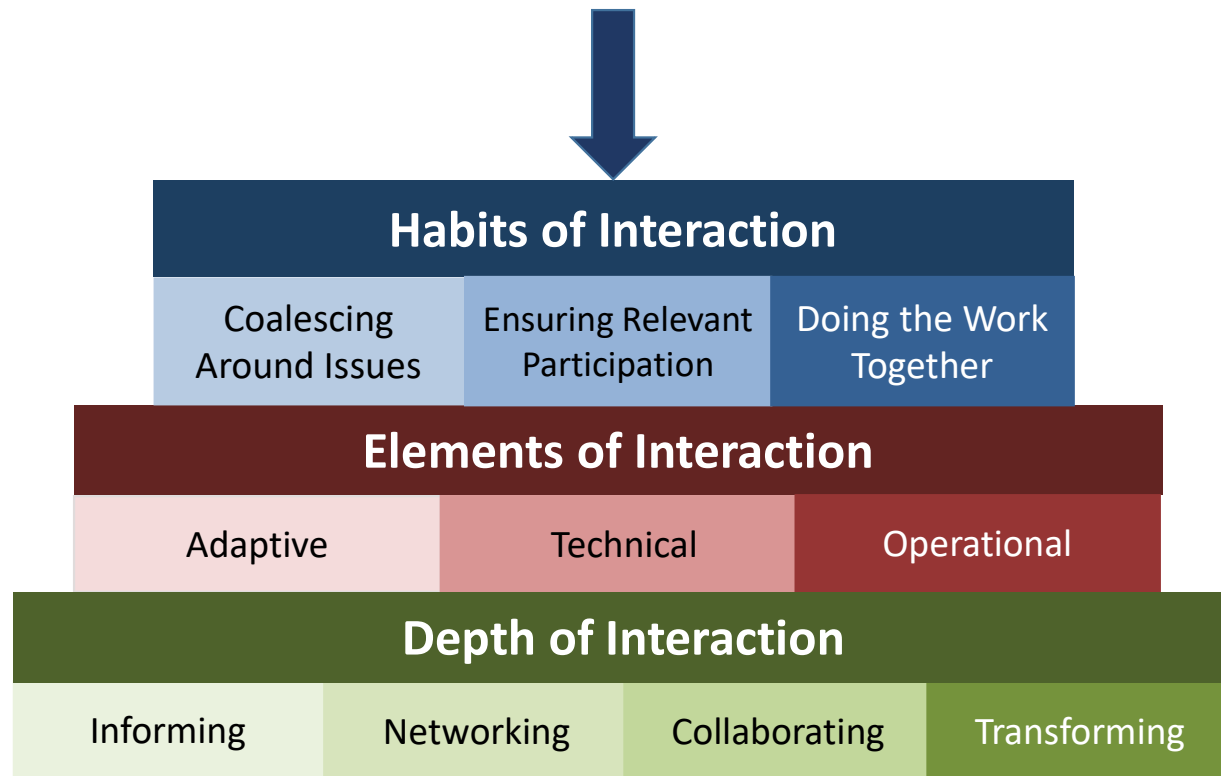
Convene the stakeholders to discover why the issue is important
and what we need to do to improve practice.

“From your
perspective....”



“In your
experience...”

Habit of Interaction: Ensuring Relevant Participation



Habit of Interaction

Ensuring Relevant Participation

A habit of practice that focuses on :

- the right mix of stakeholders
- helping each member participate, contribute and become actively engaged in the activities of the group

Participation and Engagement

Participation

- Accept an invitation
- Attend an event
- Share
- Ask

Engagement

- Interact with others
- Contribute
- Initiate
- Stay connected
- Find the right level of participation
- Lead/co-lead an activity
- Gradually, assume more leadership roles.

Relevant Participation Has Several Faces:

Range, Frequency, and Role

Range

- Power differential
- Supporters and critics
- Players at different levels of scale

Frequency

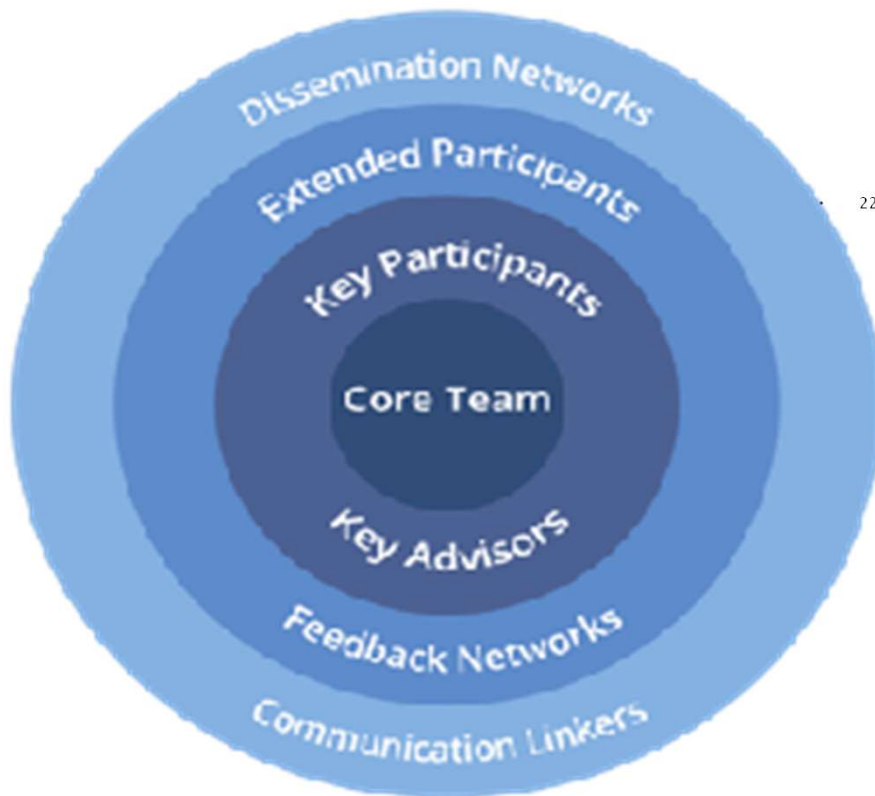
- Episodic or ongoing
- Predictable interaction, sufficient to build relationships
- Often enough so that stakeholders can take roles

Role

- Fixed or shared leadership roles
- Everybody comes as a learner

Engaging Everybody

Finding the Right Level of Participation



Core Team

- **The Doers:** Organize people and activity

Key Participants/Key Advisors

- **The Champions:** Convey the importance of the issue and invite participation

Extended Participants/Feedback Networks:

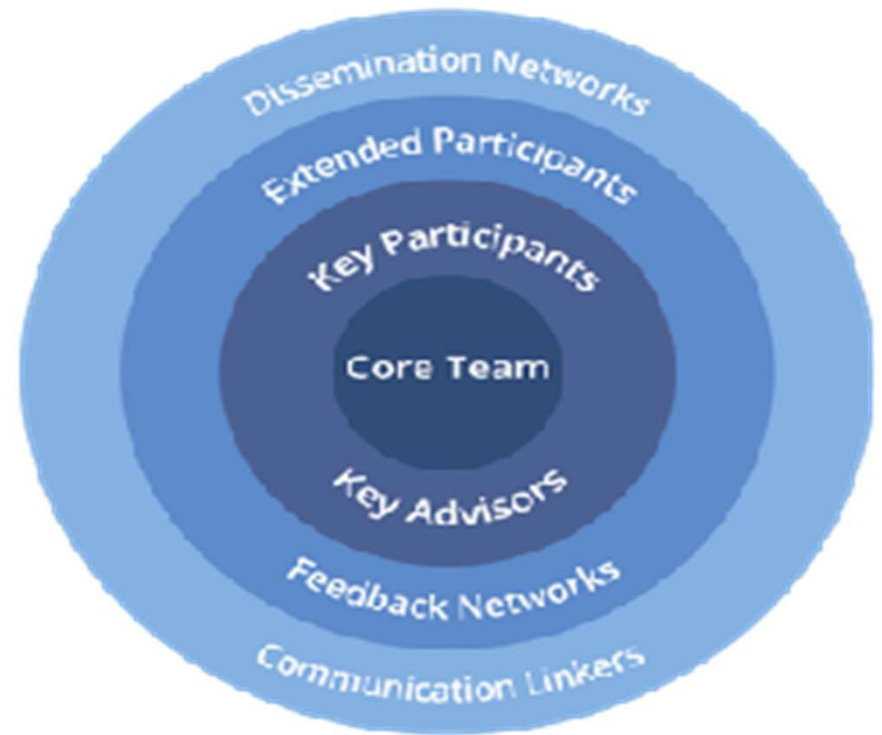
- **The Intended Audiences:** Keep the conversation focused on the practice/service level; promote understanding with their friends and colleagues

Dissemination/Communication Networks

- **The Promoters:** Use exiting communication channels to bring attention to the issue and the solutions

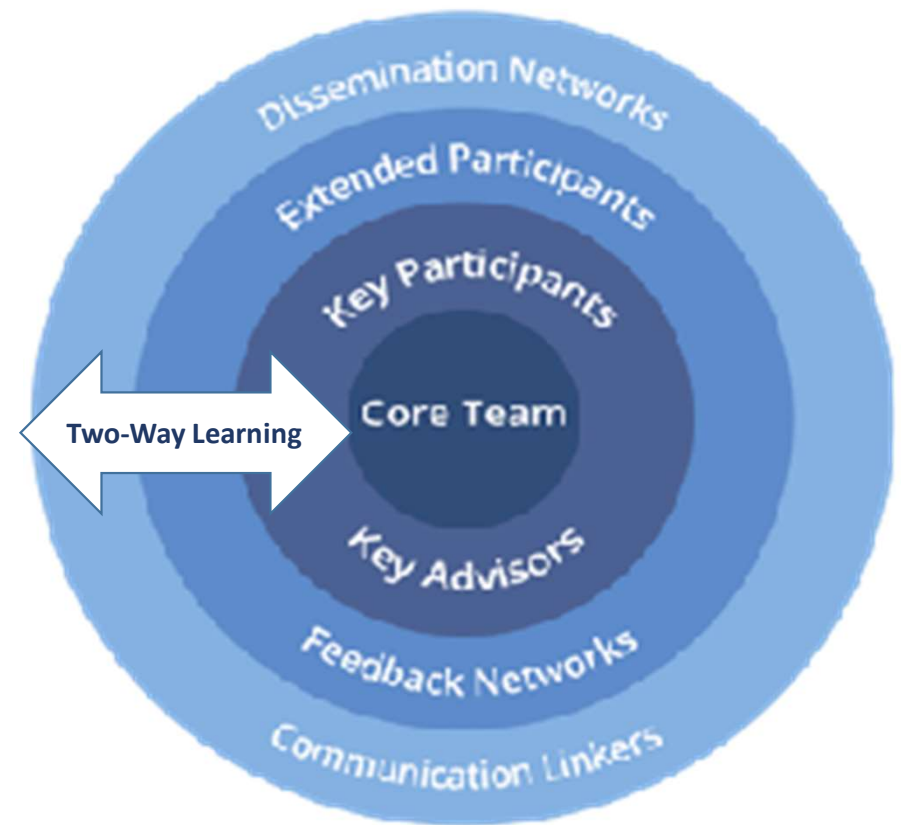
Breakthrough: *Getting Beyond the Second Circle*

- Initiatives that fail to engage
 - Don't go beyond the leaders
 - Only one or two persons deep even ... when multiple stakeholders participate
- In your view, how are *Circles 3 and 4* breakthrough?



Building Engagement across the Circles

- How does engagement support learning across groups with differing knowledge?
- How does learning support more informed action?



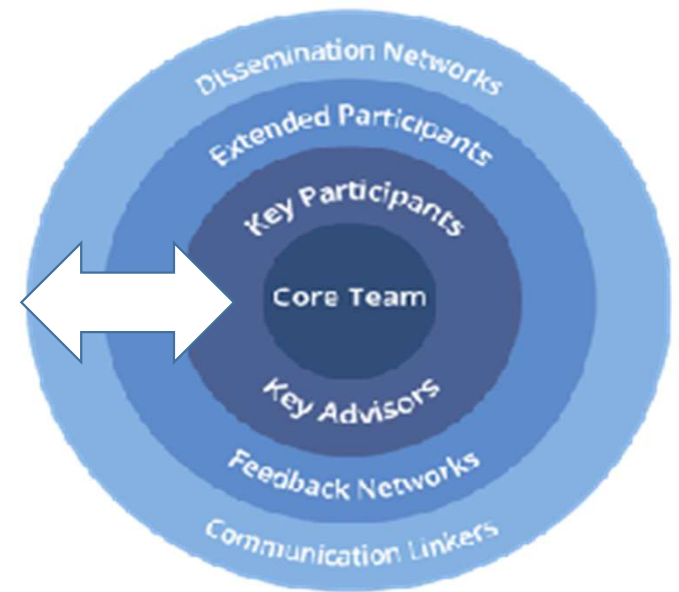
Relevant Participation

What Does It Look Like?

Operational Decisions	Informing	Networking	Collaborating	Transforming
Ensure relevant participation	Convener/lead agency identifies stakeholder representatives, and informs them of opportunities to participate.	A core group of stakeholders works with the convener to identify/create an infrastructure for meaningful participation and shared learning.	The expanded group of stakeholders recognizes and values the work of others needed to achieve meaningful outcomes.	Broad stakeholder networks share ownership and influence in achieving the outcome.
Translate work into ways that others participate	Convener/lead agency asks stakeholder representatives to disseminate information on the issue	A core group of stakeholders uses the infrastructure to exchange information in understandable and mutually respectful ways.	The expanded group of stakeholders involves their networks in bridging knowledge and practice.	Broad stakeholder networks support their constituents throughout the practice change.

LbC Tool: 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?
- Use this tool to create manageable ways to involve everybody.



A Practice Scenario

During the COVID statewide 'stay at home' restrictions, many agencies and providers have quickly moved to telecommunication and teletherapy. During the first few weeks, staff adjusted to the new system. Some practitioners even report better participation, especially by children and youth.

Other practitioners report that families have expressed a lack of comfort with the platforms used for online communication. They know that not all providers are using the same platforms. In addition, other agencies, like schools and other telehealth providers are using an array of different platforms. They wonder, as the practice grows, what do they need to do to learn who is doing what?

- Using the ***Circles*** and looking at the issue from the MH perspective, describe who might be in each circle and what they might do?

Breakout Reflection

What insights/ideas came from your interaction?

A Quick Check on Relevant Participation

Poll 7: True or False

1. When undertaking new work, keep the number of people small so they can get to work sooner.
2. People need to feel personally valued to stay connected to the work.
3. It is difficult for stakeholders to keep participating if they have no role.
4. Disseminations networks create a 'buzz' about the issue and the work underway.
5. Unlike a traditional meeting, a convening begins relationship.
6. Spend time in discussions to turn participants into partners.

More LbC Tools to Support Relevant Participation

What's in It for Me?

Participation is not the same as engagement. Use this tool to identify the difference and begin to really engage your partners.

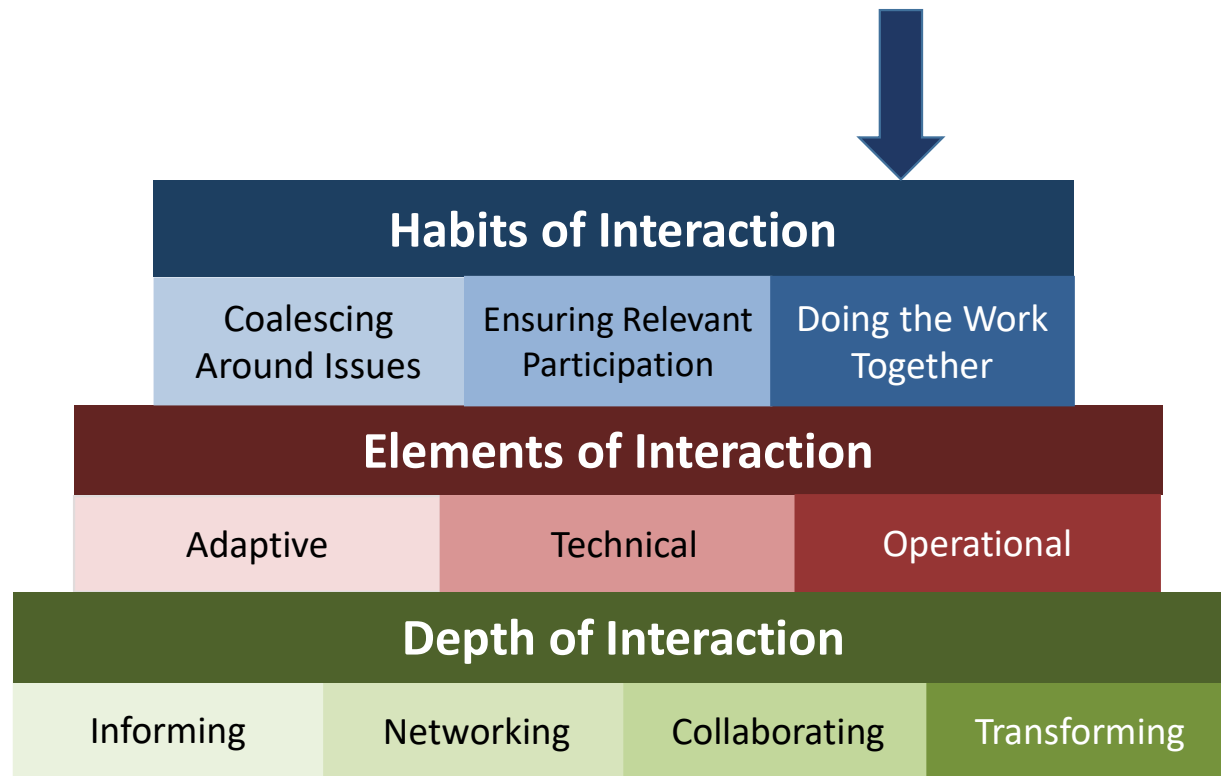
Learn the Language: Make the Connection

Unique vocabulary, program names and funding streams contribute to the lack of clarity around shared interests. Use this tool to help your stakeholders find the commonality.

Web of Connections

Why do you identify certain groups as potential partners? Why would they want to become a partner? Use this tool to articulate the various perspectives around a shared issue

Habit of Interaction: Ensuring Relevant Participation



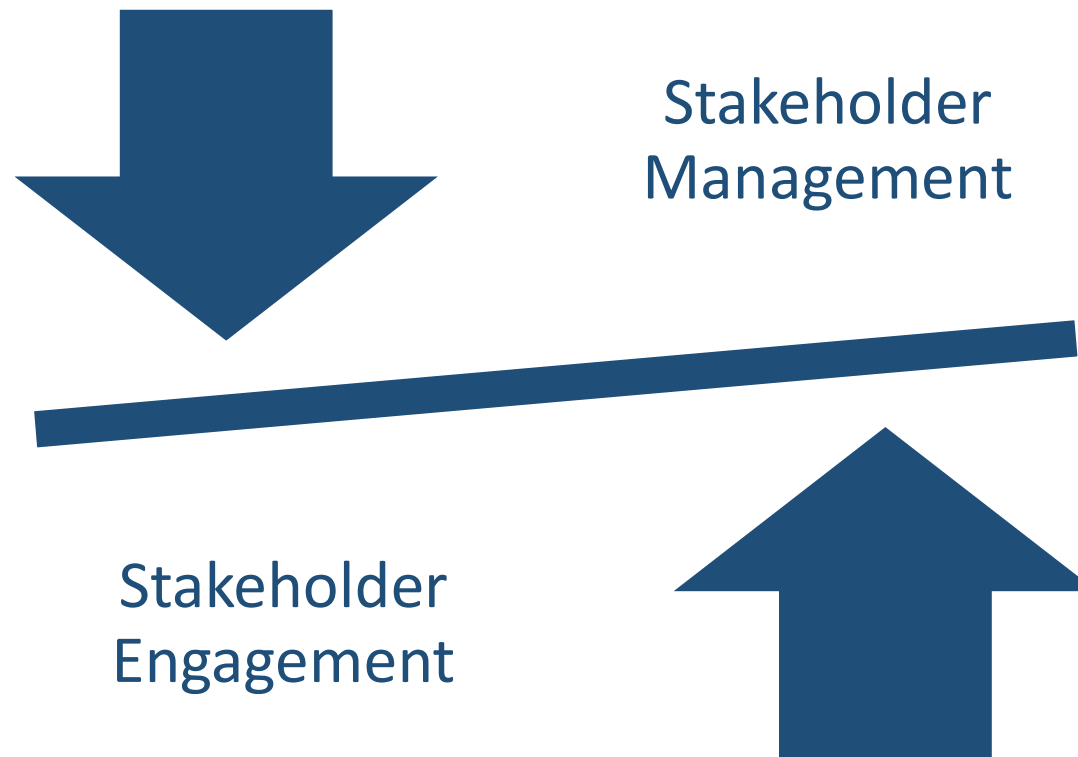
Habit of Interaction

Doing Work Together

- People judge your sincerity by what you say and what you do.
- Engagement is the result of what you do and what you fail to do.
- Nothing you do is neutral*. Everything you do moves people toward or away from engagement.

**Key Principle of Invitational Education, Dr William Purkey*

Are You Managing or Engaging Your Stakeholders?



Poll 8: Ten Ways to Engage

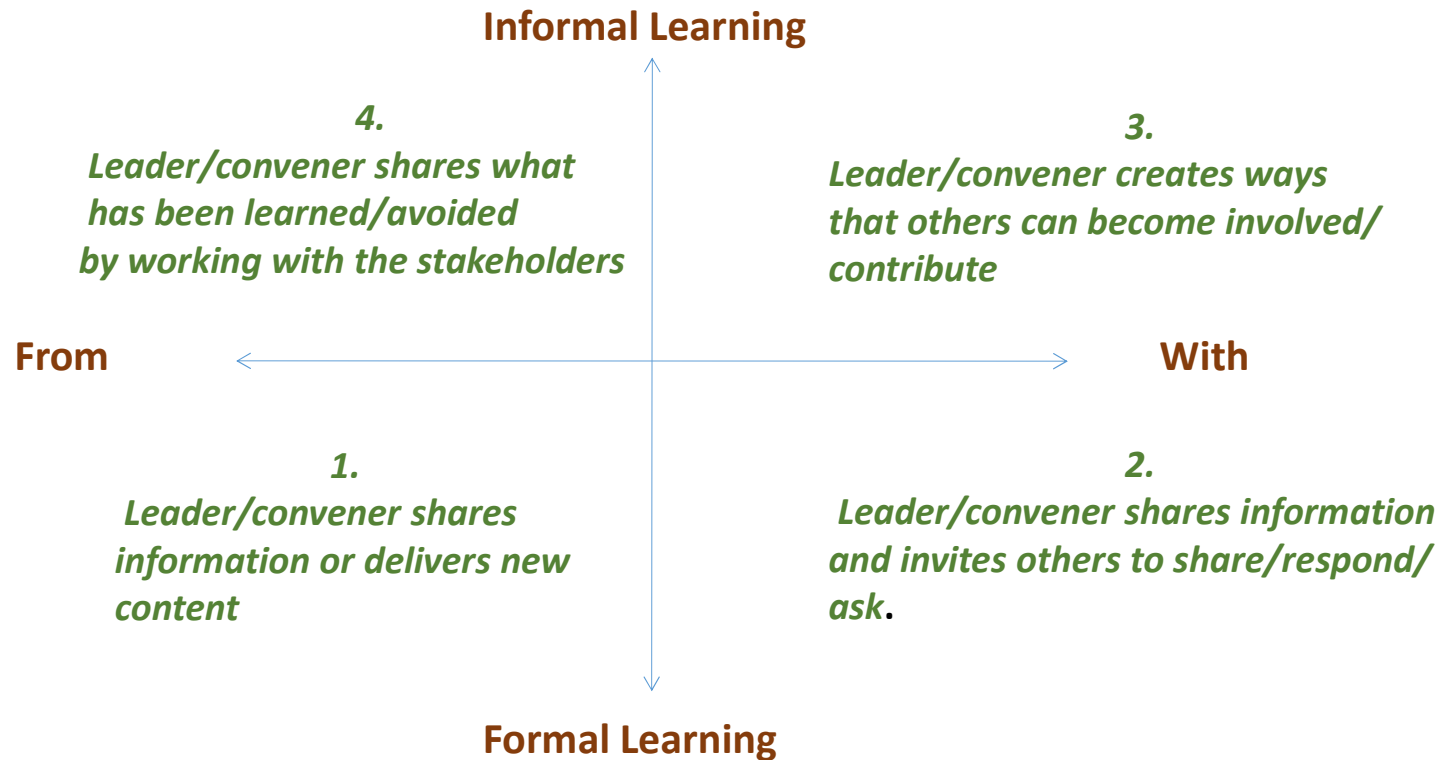
- 1. Email distribution lists
- 2. Facebook announcements of events
- 3. Webinars delivered by experts
- 4. Conferences
- 5. Family events
- 6. Regional workgroups on an issue
- 7. Webinars delivered by practitioner/ families/youth presenters
- 8. Stakeholder discussions through Zoom meetings
- 9. Interviews
- 10. Online surveys

LbC Tool: One-Way, Two-Way Learning

- While formal systems often communicate through a one-way process, interaction demands a two-way process.
- Use this tool to transform your interactions.

One Way- Two Way Learning

Plotting Learning Activities in Four Quadrants



Poll 9: Plotting the Ten Ways in Four Quadrants

- Email distribution lists
- Facebook announcements of events
- Webinars delivered by experts
- Conferences
- Family events
- Regional workgroups on an issue
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- Online surveys

Doing Work Together

What Does it Look Like?

Operational Decisions	Informing	Networking	Collaborating	Transforming
Communicate what is changing by actively doing work with the stakeholders	Convener/lead agency asks the stakeholder representatives to convey the benefit in making changes throughout their networks.	A core group of stakeholders use the infrastructure to exchange information about the changes that are occurring.	The expanded group of stakeholders shares the stories of changes achieved because the networks are more engaged in bridging knowledge and practice.	Broad stakeholder networks exchange stories of practice change and outcomes. They communicate the changes in ways the advance acceptance and the changes are enthusiastically embraced.
Demonstrate what is changing by actively doing the work	Stakeholder representatives invite others to participate in discussions on the changes being experienced.	A core group of stakeholders intentionally share stories, exchange information and suggest ideas for action.	The expanded group of stakeholders embraces shared leadership and participates in joint work across the networks.	Within broad stakeholder networks, excellent examples of practice change are routinely observable.

More LbC Tools for Doing the Work Together

Problems Come Bundled

Few problems have just a technical side or just a human side. Use this tool to more fully identify the issues you face.

Building Engagement

Anybody can deliver information. We want engagement. Use this tool to generate learning activities around an issue.

Defining Our Core

We often need to describe our work in straightforward ways that are understandable to potential partners and the public. Use this tool to express your driving purpose and share it simply with others.

LbC Tool: Measuring Progress on Engagement

Simple Data Collection through Rubrics

- The value of relationships is hard to describe and even more difficult to measure.
- Use this tool to identify and quantify the value of relationships as strategy.
- Collecting data on engagement
 - Participation is just the start (*technical side*).
 - The ongoing relationship is the evidence (*adaptive side*).

Measuring Progress:

Qualitative Rubrics to Quantitative Comparisons



Coalescing Around Issues Rubric

Coalescing Around Issues	Depth of Interaction			
	Informing Level (Sharing/Sending)	Networking Level (Exchanging)	Collaborating Level (Engaging)	Transforming Level (Committing to Consensus)
Acknowledging and valuing diversity.	A core group of interested stakeholders disseminates information to potentially interested stakeholders, across roles, to inform them about issues and invite them into the discussion.	Stakeholders from diverse roles exchange ideas and resources with one another. Clarification of role-specific vocabulary is at beginning stages. Outreach to others with a specific focus on roles not yet involved continues.	Diverse stakeholders engage in dialogue about issues. Differences are acknowledged and explored. A common vocabulary begins to emerge.	Diverse stakeholders with diverse perspectives are engaged through multiple ways in active collaborative dialogue about issues in order to reach consensus about priorities and future research, policy and practice opportunities.
Researching and agreeing on relevant data.	Personal and professional experiences (anecdotal) are the primary source of evidence for consideration.	Stakeholders consider what other data beyond personal stories could be a source of evidence and begin collecting relevant data and resources.	Stakeholders identify relevant data from across disciplines and examine for common themes for understanding (collective analysis).	Through consensus, stakeholders agree on the anecdotal and research data from various perspectives and sources relevant to the issue.
Decision making through consensus.	Core group identifies an issue of importance.	Stakeholders contribute to the discussion, bringing in other perspectives.	Stakeholders contribute to and create a shared vocabulary. They reach across systems to review, critique and revise and/or confirm the issue to be addressed.	Through consensus, stakeholders determine the specific aspects of the issue that the group will move forward to influence.
Coalescing to move to future work together.	Core group intentionally shares with others, who are not already stakeholders, the reason for caring about this issue, meeting one-on-one with targeted persons, organizations, etc.	Stakeholders are intentional about inviting new members into the group work and being purposeful in getting the people in the same room to work together.	Stakeholders develop grounding documents (mission, vision, guiding principles and ground rules). Stakeholders develop and agree on a process of continued communication that fits their needs.	Through consensus, stakeholders develop a set of actionable goals that define the work scope of the effort. Relationships are built for strategic advantage.

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Acknowledging and valuing diversity.	A core group of interested stakeholders disseminates information to potentially interested stakeholders, across roles, to inform them about issues and invite them to discussion. 100%	Stakeholders from diverse roles exchange ideas and resources with one another. Clarification of role-specific vocabulary is at beginning stages. Outreach to others with a specific focus on roles not yet involved continues.	Diverse stakeholders engage in dialogue about issues. Differences are acknowledged and explored. A common vocabulary begins to emerge.	Diverse stakeholders with diverse perspectives are engaged through multiple ways in active collaborative dialogue about issues in order to reach consensus about priorities and future research, policy and practice opportunities.
Researching and agreeing on relevant data.	Personal and professional experiences (anecdotal) are the primary source of evidence for core group. 70%	Stakeholders consider what other data beyond personal stories could be a source of evidence and begin collecting relevant data and resources. 30%	Stakeholders identify relevant data from across disciplines and examine for common themes for understanding (collective analysis).	Through consensus, stakeholders agree on the anecdotal and research data from various perspectives and sources relevant to the issue.
Decision making through consensus.	Core group identifies an issue of importance. 90%	Stakeholders contribute to the discussion, bringing in other perspectives. 10%	Stakeholders contribute to and create a shared vocabulary. They reach across systems to review, critique and revise and/or confirm the issue to be addressed.	Through consensus, stakeholders determine the specific aspects of the issue that the group will move forward to influence.
Coalescing to move to future work together.	Core group intentionally shares with others, who are not already stakeholders, the reason for caring about this issue, meeting one-on-one with individuals, organizations, etc. 90%	Stakeholders are intentional about inviting new members into the group work and being purposeful in getting the people in the same room to work together. 10%	Stakeholders develop grounding documents (mission, vision, guiding principles and ground rules). Stakeholders develop and agree on a process of continued communication that fits their needs.	Through consensus, stakeholders develop a set of actionable goals that define the work scope of the effort. Relationships are built for strategic advantage.

Coalescing Around Issues Rubric

Coalescing Around Issues	Depth of Interaction			
	Informing Level (Sharing/Sending)	Networking Level (Exchanging)	Collaborating Level (Engaging)	Transforming Level (Committing to Consensus)
Acknowledging and valuing diversity.	A core group of interested stakeholders disseminates information to potentially interested stakeholders, across roles, to inform them about issues and invite them into the discussion.	Stakeholders from diverse roles exchange ideas and resources with one another. Clarification of role-specific vocabulary is at beginning stages. Outreach to others with a specific focus on roles not yet involved continues.	Diverse stakeholders engage in dialogue about issues. Differences are acknowledged and explored. A common vocabulary begins to emerge.	Diverse stakeholders with diverse perspectives are engaged through multiple ways in active collaborative dialogue about issues in order to reach consensus about priorities and future research, policy and practice opportunities.
Researching and agreeing on relevant data.	Personal and professional experiences (anecdotal) are the primary source of evidence for consideration.	Stakeholders consider what other data beyond personal stories could be a source of evidence and begin collecting relevant data and resources.	Stakeholders identify relevant data from across disciplines and examine for common themes for understanding (collective analysis).	Through consensus, stakeholders agree on the anecdotal and research data from various perspectives and sources relevant to the issue.
Decision making through consensus.	Core group identifies an issue of importance.	Stakeholders contribute to the discussion, bringing in their perspectives.	Stakeholders contribute to and create a shared vocabulary. They reach across systems to review, critique and revise and/or confirm the issue to be addressed.	Through consensus, stakeholders determine the specific aspects of the issue that the group will move forward to influence.
Coalescing to move to future work together.	Core group intentionally shares with others, who are not already stakeholders, the reason for caring about this issue, meeting one-on-one with targeted persons, organization, etc.	Stakeholders are intentional about inviting new members into the group work and being purposeful in getting the people in the same room to work together.	Stakeholders develop grounding documents (mission, vision, guiding principles and ground rules). Stakeholders develop and agree on a process of continued communication that fits their needs.	Through consensus, stakeholders develop a set of actionable goals that define the work scope of the effort. Relationships are built for strategic advantage.

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Acknowledging and valuing diversity.	A core group of interested stakeholders disseminates information to potentially interested stakeholders, across roles, to inform them about issues and invite them to discussion. 100%	Stakeholders from diverse roles exchange ideas and resources with one another. Clarification of role-specific vocabulary is at beginning stages. Outreach to others with a specific focus on [redacted] involved continues. 70%	Diverse stakeholders engage in dialogue about issues. Differences are acknowledged and explored. A common vocabulary begins to emerge. 30%	Diverse stakeholders with diverse perspectives are engaged through multiple ways in active collaborative dialogue about issues in order to reach consensus about priorities and future research, policy and practice opportunities.
Researching and agreeing on relevant data.	Personal and professional experiences (anecdotal) are the primary source of evidence for core group. 70%	Stakeholders consider what other data beyond personal stories could be a source of evidence and begin collecting relevant data and resources. 60% 30%	Stakeholders identify relevant data from across disciplines and examine for commonalities for understanding (collective analysis). 40%	Through consensus, stakeholders agree on the anecdotal and research data from various perspectives and sources relevant to the issue.
Decision making through consensus.	Core group identifies an issue of importance. 90%	Stakeholders contribute to the discussion, bringing in other perspectives. 90% 10%	Stakeholders contribute to and create a shared vocabulary across systems, critique and revise and/or confirm the issue to be addressed. 10%	Through consensus, stakeholders determine the specific aspects of the issue that the group will move forward to influence.
Coalescing to move to future work together.	Core group intentionally shares with others, who are not already stakeholders, the reason for caring about this issue, meeting one-on-one with [redacted] persons, organizations, etc. 90%	Stakeholders are intentional about inviting new members into the group work and being purposeful in getting the people [redacted] the room to work together. 100% 10%	Stakeholders develop grounding documents (mission, vision, guiding principles and ground rules). Stakeholders develop and agree on a process of continued communication that fits their needs.	Through consensus, stakeholders develop a set of actionable goals that define the work scope of the effort. Relationships are built for strategic advantage.

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	Informing Level (Sharing/Sending)	Networking Level (Exchanging)	Collaborating Level (Engaging)	Transforming Level (Committing to Consensus)
Acknowledging and valuing diversity.	A core group of interested stakeholders disseminates information to potentially interested stakeholders, across roles, to inform them about issues and invite them into the discussion.	Stakeholders from diverse roles exchange ideas and resources with one another. Clarification of role-specific vocabularies at beginning stages. Outreach to others with a specific focus on roles not yet involved continues.	Diverse stakeholders engage in dialogue about issues. Differences are acknowledged and explored. A common vocabulary begins to emerge.	Diverse stakeholders with diverse perspectives are engaged through multiple ways in active collaborative dialogue about issues in order to reach consensus about priorities and future research, policy and practice opportunities.
Researching and agreeing on relevant data.	Personal and professional experiences (anecdotal) are the primary source of evidence for consideration.	Stakeholders consider what other data beyond personal stories could be a source of evidence and begin collecting relevant data and resources.	Stakeholders identify relevant data from across disciplines and examine for common themes for understanding collective analysis.	Through consensus, stakeholders agree on the anecdotal and research data from various perspectives and sources relevant to the issue.
Decision making through consensus.	Core group identifies an issue of importance.	Stakeholders contribute to the discussion, bringing in their perspectives.	Stakeholders contribute to and create a shared vocabulary. They reach across systems to review, critique and revise and confirm on the issue to be addressed.	Through consensus, stakeholders determine the specific aspects of the issue that the group will move forward to influence.
Coalescing to move to future work together.	Core group intentionally shares with others, who are not already stakeholders, the reason for caring about this issue, meeting one-on-one with targeted persons, organization, etc.	Stakeholders are intentional about inviting new members into the group work and being purposeful in getting the people in the same room to work together.	Stakeholders develop grounding documents (mission, vision, guiding principles and ground rules). Stakeholders develop and agree on a process of continued communication that fits their needs.	Through consensus, stakeholders develop a set of actionable goals that define the work scope of the effort. Relationships are built for strategic advantage.

Coalescing Around Issues Rubric

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	Informing Level (Sharing/Sending)	Networking Level (Exchanging)	Collaborating Level (Engaging)	Transforming Level (Committing to Consensus)
Acknowledging and valuing diversity.	A core group of interested stakeholders disseminates information to potentially interested stakeholders, across roles, to inform them about issues and invite them to discussion. 100%	Stakeholders from diverse roles exchange ideas and resources with one another. Clarification of role-specific vocabulary is ongoing. Outreach to others with a specific focus on those involved continues. 10% 70%	Diverse stakeholders engage in dialogue about issues. Differences are acknowledged and explored. A common vocabulary begins to emerge. 70% 30%	Diverse stakeholders with diverse perspectives are engaged through multiple ways in collaborative dialogue about issues in order to reach consensus about priorities and future research, policy and practice opportunities. 20%
Researching and agreeing on relevant data.	Personal and professional experiences (anecdotal) are the primary source of evidence for the issue. 70%	Stakeholders consider what other data beyond personal stories could be a source of evidence and begin collecting relevant data and resources. 60% 30%	Stakeholders identify relevant data and cross-examine it for consistency and understanding (collective analysis). 100% 40%	Through consensus, stakeholders agree on the anecdotal and research data from various perspectives and sources relevant to the issue.
Decision making through consensus.	Core group identifies an issue of importance. 90%	Stakeholders contribute to the discussion, sharing their perspectives. 20% 90% 10%	Stakeholders contribute to and create a shared vocabulary across systems, critique and revise and/or confirm the issue to be addressed. 80% 10%	Through consensus, stakeholders determine the specific aspects of the issue that the group will move forward to influence.
Coalescing to move to future work together.	Core group intentionally shares with others, who are not already stakeholders, the reason for caring about this issue, meeting one-on-one with individuals, organizations, etc. 90%	Stakeholders are intentional about inviting new members into the group work and being purposeful in getting the people into the room to work together. 100% 10%	Stakeholders develop ground rules (mission, vision, guiding principles and ground rules). Stakeholders develop and agree on a process of continued communication that fits their needs. 100%	Through consensus, stakeholders develop a set of actionable goals that define the work scope of the effort. Relationships are built for strategic advantage.

Assessing the impact of engagement on practice change

- How do engagement indicators align with practice change data?
- How can the two data sets help you plan next steps?

Online tool: sample survey item

THE PARTNERSHIP WAY

Coalescing around Issues

Please read each question and think about the work you are doing together. Then, choose the response that best describes the way stakeholders come together around the issues.

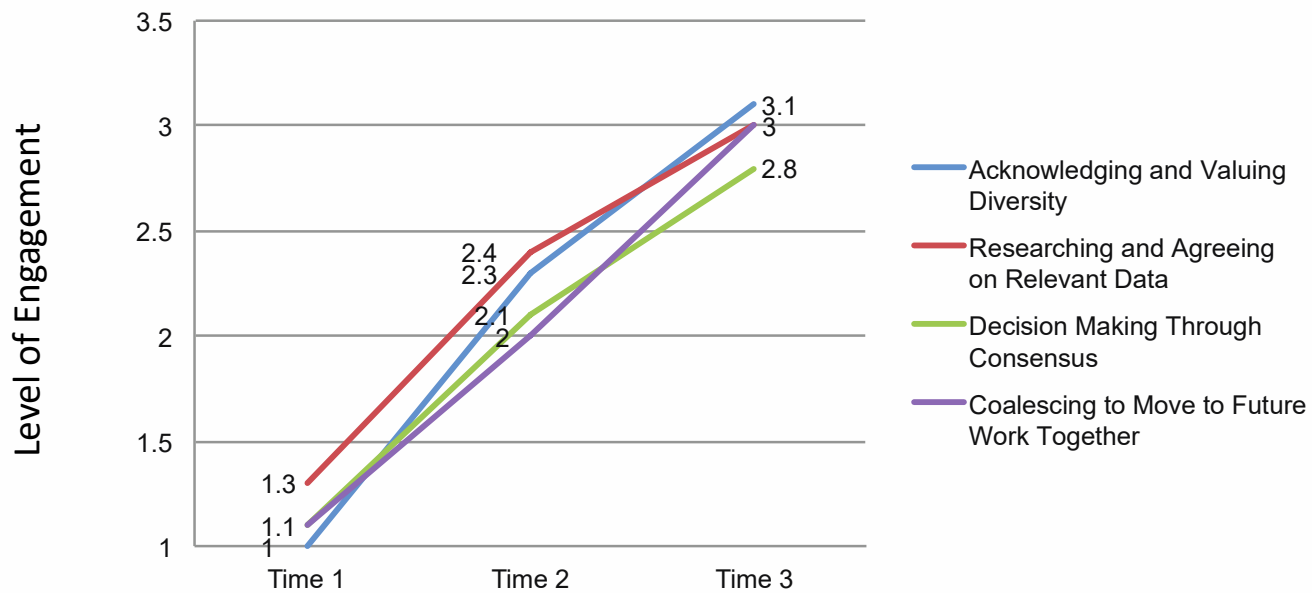
1. To what extent does the group acknowledge and value diversity?

- ☐ A core group of interested stakeholders disseminates information to potential stakeholders, across roles, to inform them about issues and invite them into the discussion.
- ☐ Stakeholders from diverse roles exchange ideas and resources with one another; clarification on role-specific vocabulary is at the beginning stage; outreach to others continues, with a specific focus on roles of stakeholders who are not yet involved.
- ☐ Diverse stakeholders engage in dialogue about issues. Differences are acknowledged. A common vocabulary begins to emerge.
- ☐ Diverse stakeholders, with diverse perspectives, are engaged in multiple ways through active dialogue around issues in order to reach consensus about priorities and future research, policy and practice opportunities.

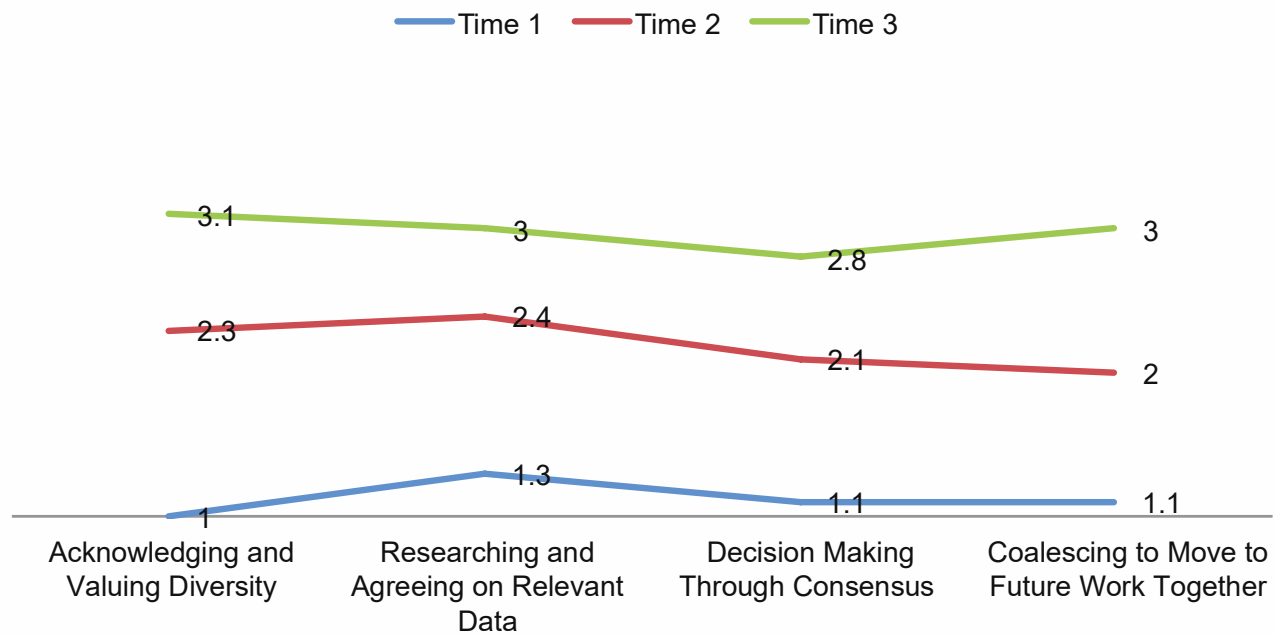
2. To what extent does the group research and agree on relevant data?

- ☐ Personal and professional experiences (anecdotal) are the primary source of evidence for consideration.
- ☐ Stakeholders consider what other data - beyond personal stories - could be a source of evidence and begin collecting relevant data and resources.
- ☐ Stakeholders identify relevant data from across disciplines. They examine the information for common themes. They analyze the data together for shared understanding (collective analysis).
- ☐ Through consensus, stakeholders agree on the anecdotal and research data that is relevant to the issue. They consider and seek data sources that represent various perspectives on the issue.

Coalescing Around Issues



Coalescing Around Issues



More LbC Tools for Bringing it All Together

[A Quick Chronology of Engagement](#)

It is helpful for groups to look back on their work together and to tell the story of their engagement. Use this tool to develop and reflect on the chronology of your group's engagement and describe the value of your work together.

[Give Value First](#)

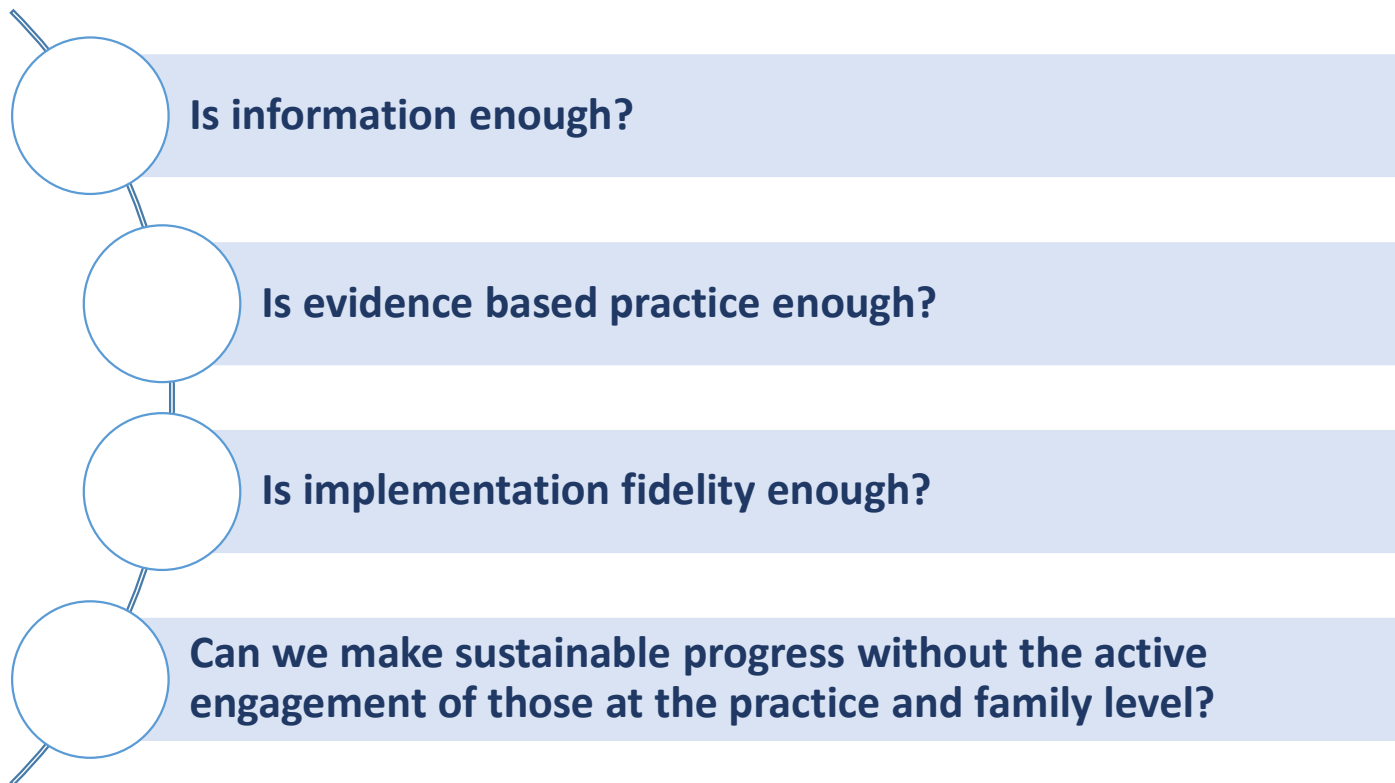
Do you have expectations as you enter a learning partnership? Use this tool to rethink how expectations shape a potential partnership.

[Your Brand](#)

Your brand is not your content, your logo or your website. It's what your stakeholders perceive about you, and how you make them feel. Use this tool to build your brand.

Leading by Convening Asks the Question:

How are we engaging stakeholders to meet the challenges?



Follow-through Sessions

Explore LbC Principles and More LbC tools through Practice Scenarios



[Home](#) [Partners](#) [Working Together](#) [Using Tools](#) [Building Connections](#) [Creating Community](#) [Q](#)

The IDEA Partners know the value of this statement. In years of bringing people together, we have focused on both the technical and the human side of change. The work of many researchers have guided us, especially the common sense approach of Heifetz and Linsky. You will find their influence throughout our site. Visit the [People to People Collection](#) to learn more about the human side of change and learn how we have operationalized it in our Blueprint: The Partnership Way.

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Poll 10: My Own Practice: *Leading by Convening*

My Behavior	Extent to which I am motivated to attend and improve
Meet people ' <i>where they are</i> '..	1 2 3 4 5 6 7 8 9 10
Help them to ' <i>lead in place</i> '.	1 2 3 4 5 6 7 8 9 10
Share leadership. Translate complex work into ways that many people can contribute..	1 2 3 4 5 6 7 8 9 10
Recognize that everyone is both a leader and a learner.	1 2 3 4 5 6 7 8 9 10
Help system leaders to create opportunities for authentic engagement	1 2 3 4 5 6 7 8 9 10
Build participation skills in stakeholders.	1 2 3 4 5 6 7 8 9 10
Focus on deepening engagement.	1 2 3 4 5 6 7 8 9 10