

Learning Targets

1. I can describe authentic stakeholder engagement.
2. I can recognize characteristics of three approaches to leadership.
3. I can identify one or **more** Leading by Convening tools that will assist my stakeholder team develop, sustain, or improve its impact.

There will never be enough laws, policies, processes or documents to force change.
Change is best realized through the relationships we build with those people and groups that have a common interest toward solving a persistent problem or seizing an opportunity.

Bill East, Jr., Ed.D.
*National Association of State Directors
of Special Education (NASDSE), 2012*

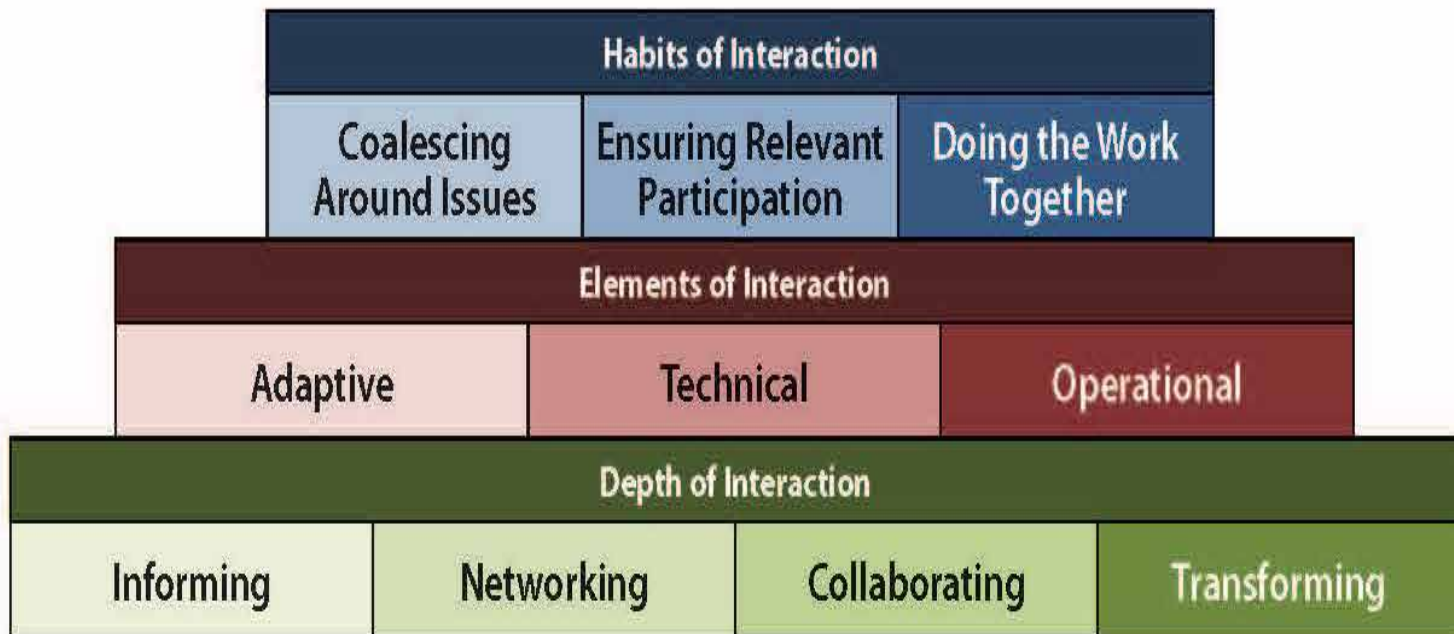




idea
PARTNERSHIP

*A partnership of families,
practitioners, administrators
and policymakers*

Leading by Convening



What do we learn by asking these questions?

- What shared concerns are going to bring people together in meaningful ways?
- Who should be at the table to ensure real progress in practice?
- What should participants be doing together to increase their individual and collective learning and ability to act?
- Who has the skill, legitimacy and leadership to convene these groups?



Authentic Stakeholder Engagement



Three questions about authentic stakeholder engagement:

Why is authentic stakeholder engagement important?

What does it look like?

How do we make it a reality in practice?

Sustainable change depends on change in the *system* and on acceptance and integration of the change into *individual identities*.



Adapted from: IDEA Partnership,
2014

**What does this
statement mean to you?**

real change
lasting
meaningful
buy-in



stakeholders

What is your relationship with stakeholders?



Stakeholder
Management



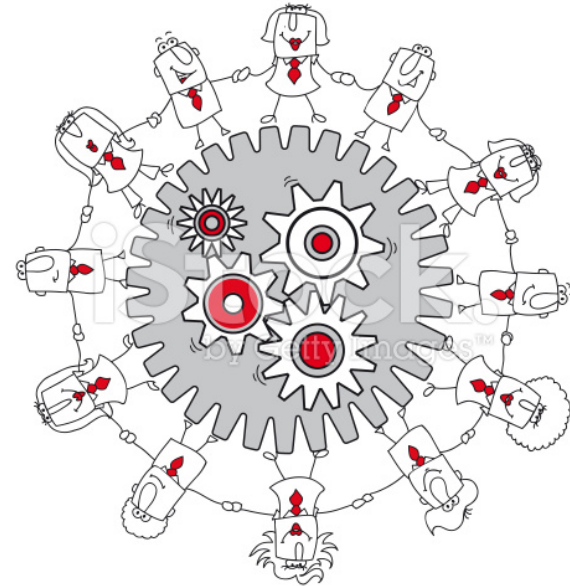
Stakeholder
Engagement



Stakeholder Management

Vs.

Stakeholder Engagement



Involvement is controlled

- Share information
- Request feedback
- Invite select group

Involvement is open

- Involve multiple stakeholders
- Share leadership
- Build consensus
- Work together

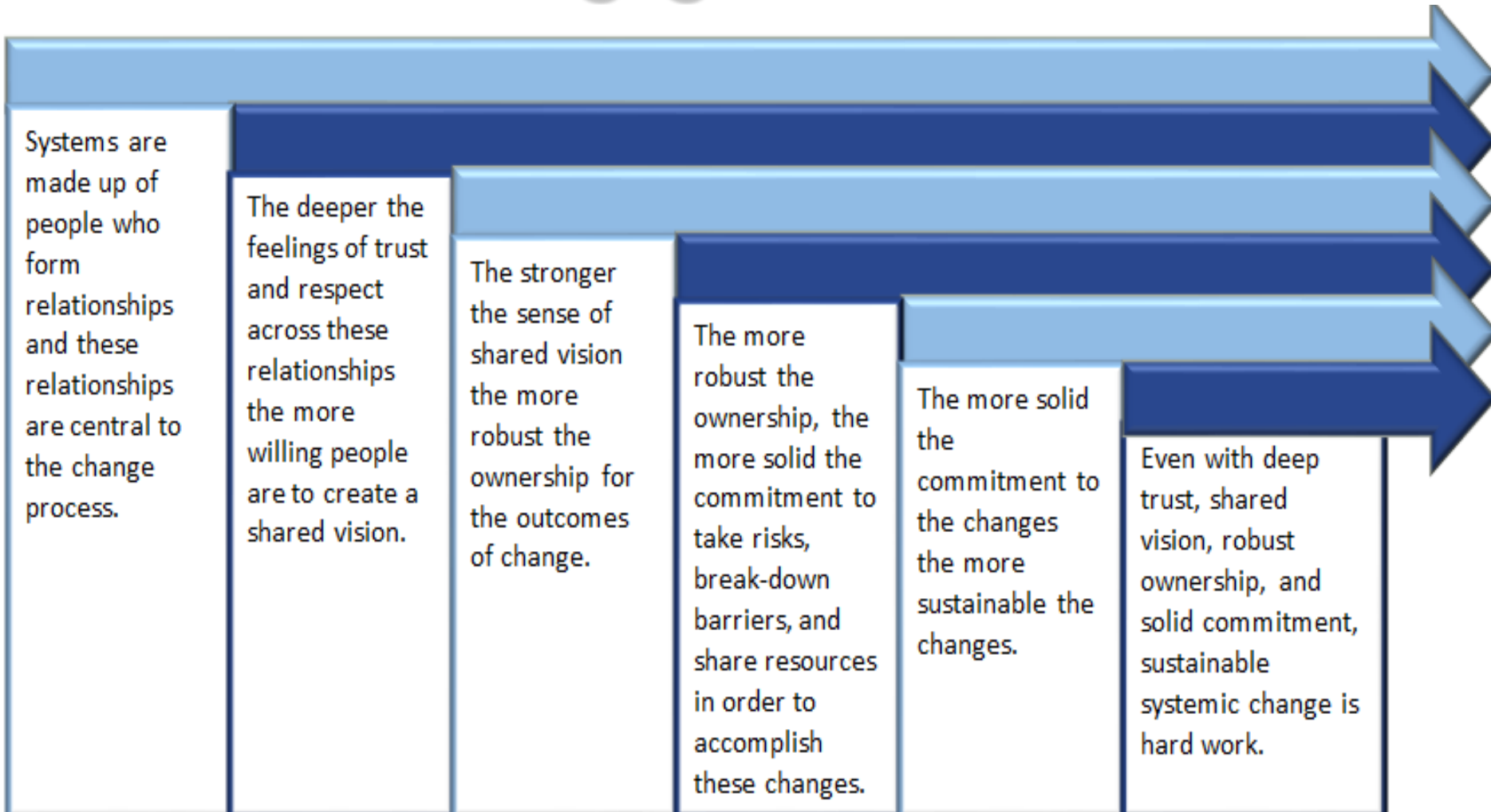


Stakeholders Expect to Be Engaged

- Avoid miscommunication
- Maximize resources
- Leverage deep and durable networks
- Support implementation and fidelity of evidence-based practices

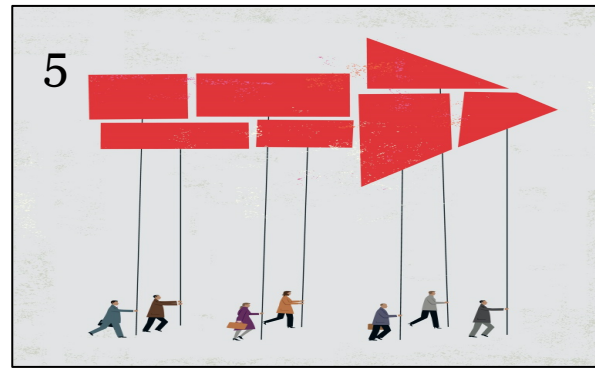
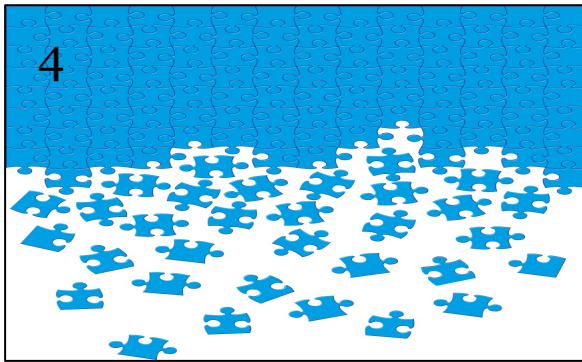
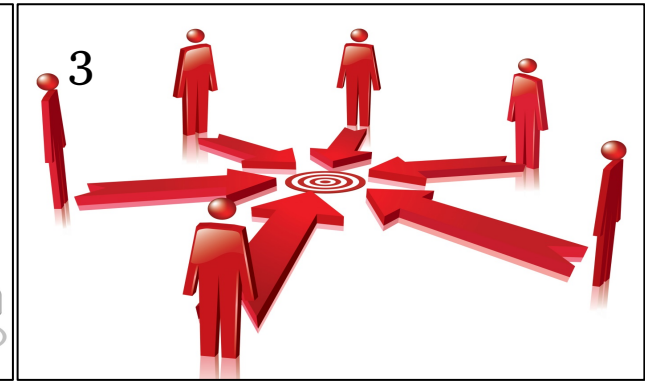
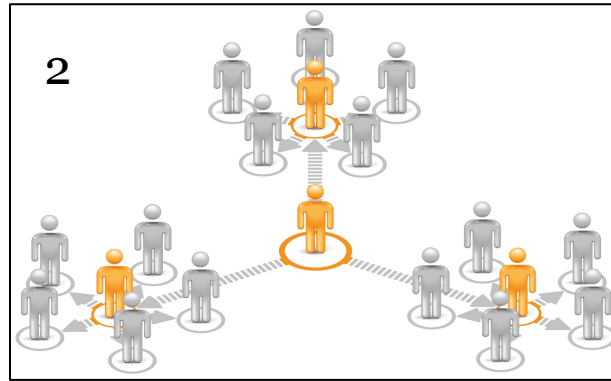
Grounding Assumptions for Stakeholder Engagement

IDEA
Partnership
@NASDSE
2016



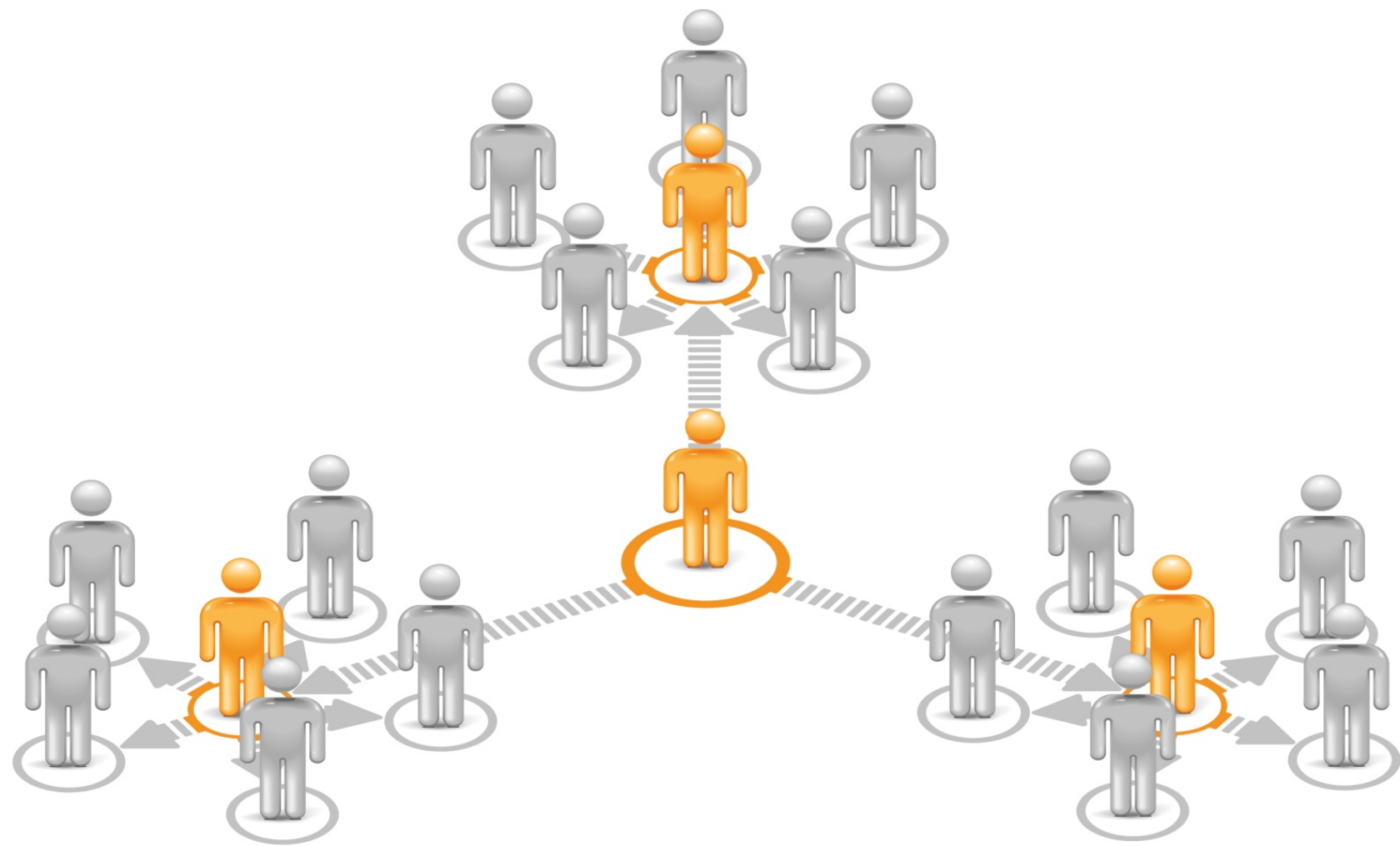
What Does Authentic Stakeholder Engagement Look Like?

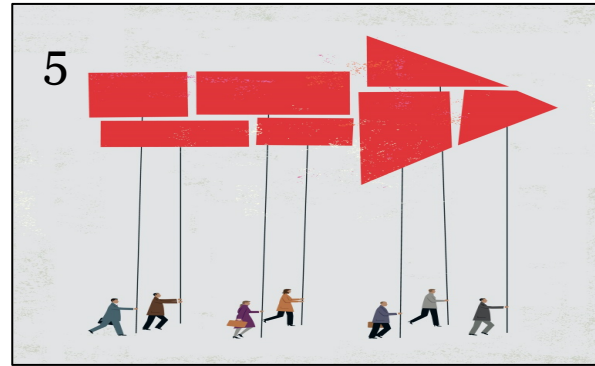
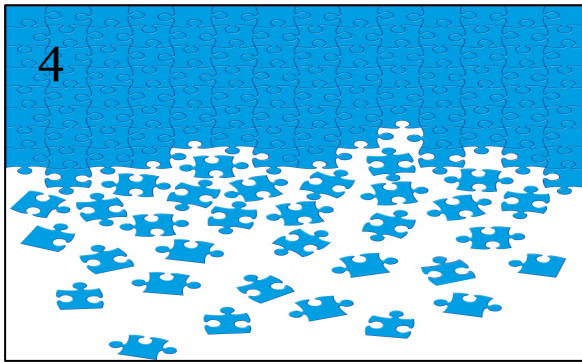
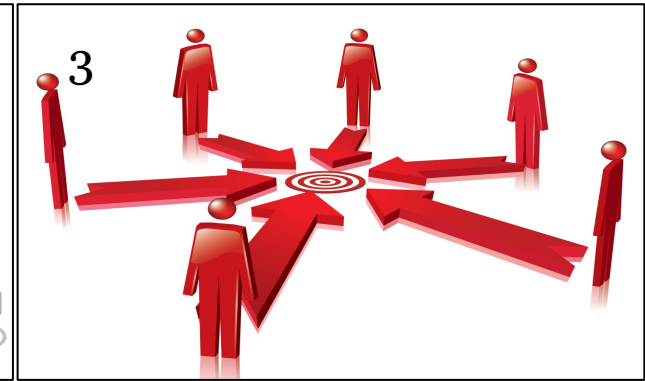
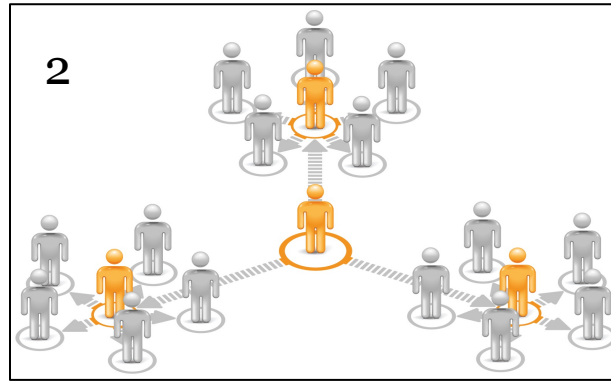




Choose the image that resonates with you







Choose the image that resonates with you

**How do we make
authentic
engagement a
reality in practice?**



Learn the Language: Make the Connection

When we started bringing different groups together, it quickly became apparent that groups had different ways of talking about the issues we share. Vocabulary, programs and funding streams contributed to the lack of clarity around shared interests. At first we thought we had to create a common vocabulary, but then we thought, "Why would we add more terminology?" We decided to be intentional about learning how our partners described our shared work. We called this strategy *learning the language*.

Major Initiative Being Discussed

Initiative:

Major Goal	Funded by	Promoted by

Initiatives Our Stakeholders Believe Are Connected to the Major Initiative Being Discussed

Initiative:

Major Goal	Funded by

Key Points That Must Be Communicated

Alignment of Goals



Leading by Convening

Bringing It All Together

Give Value First

Give Value First means to "enter a new relationship without contingencies...enter as though you are already partners."

—Jeffrey Gitomer

Think About It

What does it look like to approach collaboration as if you are already partners?



Leading by Convening

Ensuring Relevant Participation

Outline expectations
and responsibilities

What's in It for Me?

Creating Professional and Personal Value

One error that we made as we began to work across groups was mistaking participation for involvement. When you are convinced of an opportunity or a course of action, it's easy to become very focused on convincing people of your viewpoint. In our early work we found ourselves reviewing the participant lists and feeling good that so many had come to hear our message. Soon we learned that a participant list is just that; nothing more. To engage people, we had to support and encourage interactions, exchange views and form opinions about the personal and professional value of continuing to engage.

Leading by Convening

- An overarching idea
- A guiding framework
- A new discipline for leaders at every level





Convening is...

More
than a meeting

More
than facilitation

The *beginning* of a relationship
focused on practice change



Leadership Approaches





Top-down Leadership Approach

- A single authority figure or small group
- Formal channels of influence
- May consult others
- Present the final plan to those who will carry out the work



Top-down Leadership Approach

- Urgent problem or crisis situation
- Laws, rules, and regulations to be followed
- High degree of risk for the decision-maker



Bottom-up Leadership Approach

- People affected by the proposed change
- Informal networks and relationships
- Experience and knowledge
- Learning team



Bottom-up Leadership Approach

- Analyze the problem, find solutions & create the action plan together
- Share ideas and points of view
- Role of leader is fluid
- People stay the course



Partnership: A Hybrid of Top-down and Bottom-up

	Leading: Top-Down Model	Leading: Bottom-Up Model	Leading by Convening: The Partnership Way
Who	<ul style="list-style-type: none"> Senior administrator(s) drive policy decisions. Designated specialists contribute and carry out work. 	<ul style="list-style-type: none"> Representatives of a cross-stakeholder group have influence in guiding actions and decision making. Dynamic leader(s) convene(s) group. 	<ul style="list-style-type: none"> Groups with authority over the issue join with groups that have influence in the field. Persons with expertise and/or experience share knowledge and skills. Representatives of diverse stakeholder groups engage through consensus to identify issues, solve problems and take action.
How	<ul style="list-style-type: none"> Invite interested participants to a meeting. Solicit and consider input from participants. Administrators chart path, make decisions and empower others to take action. 	<ul style="list-style-type: none"> Interested parties join together. Creative agreement strategies are used to bring the group to consensus. Group charts the path and direct action. Leaders emerge. 	<ul style="list-style-type: none"> Leading by convening. Sharing perspectives among the members of the group. Sharing leadership opportunities and responsibilities, based on role, expertise and needs of the group in specific contexts or situations. Attending to both the human and technical elements of change; building relationships.
Why	<ul style="list-style-type: none"> Responsibility resides with the leader. He or she has the most say. Leader driven; autocratic or small core group of people. 	<ul style="list-style-type: none"> Buy-in across groups is desired. Responsibility resides with all. Grassroots investment engages participants and empowers action. Broad commitment to implementation. Sustainable after current leaders have moved on. 	<ul style="list-style-type: none"> Decision makers, practitioners and consumers understand that collective influence has the potential to change outcomes. Stakeholders with authority and influence have a role and their interactions produce value. Building relationships across roles and levels broadens the area of impact and supports sustainability.

Leadership within Leading by Convening

- Everyone can be a leader
- Bring groups with authority and groups with influence together
- Develops relationships to transform the work and improve outcomes

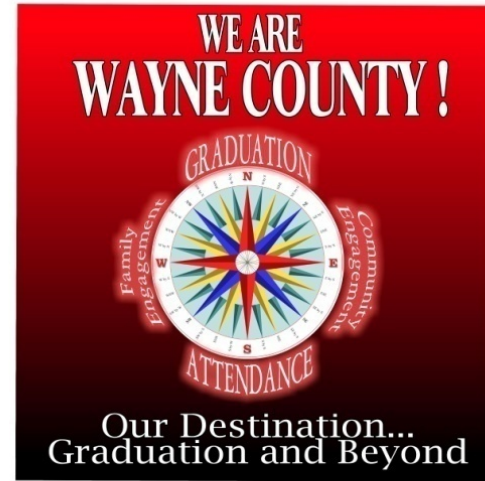


Characteristic	Top-down	Bottom-up	Leading by Convening
Persons with expertise and/or experience share knowledge and skills.			
Administrators chart the path, make decisions, and empower others to take action.			
Creative agreement strategies are used to bring the group to consensus.			
Solicit and consider input from others			
Sharing leadership opportunities and responsibilities based on role, expertise and needs of the group in specific contexts or situations.			
Broad commitment to implementation			
Group charts the path and directs action			
Leader-driven; autocratic or small core group of people			
Building relationships across roles and levels broadens the area of impact and supports sustainability.			
Dynamic leaders convene the group			
Attending to both the human and technical elements of change; building relationships.			

How did you do?

Characteristic	Top-down	Bottom-up	Leading by Convening
Persons with expertise and/or experience share knowledge and skills.			X
Administrators chart the path, make decisions, and empower others to take action.	X		
Creative agreement strategies are used to bring the group to consensus.		X	
Solicit and consider input from participants.	X		
Sharing leadership opportunities and responsibilities based on role, expertise and needs of the group in specific contexts or situations.			X
Broad commitment to implementation.		X	
Group charts the path and directs action.		X	
Leader-driven; autocratic or small core group of people.	X		
Building relationships across roles and levels broadens the area of impact and supports sustainability.			X
Dynamic leaders convene the group.		X	
Attending to both the human and technical elements of change; building relationships.			X
Invite interested participants to the meeting.	X		

Partnerships for Success - C.A.F.E.





The Nuts and Bolts of Leading by Convening



Making Change Real

We have learned that we must do more than simply say we are attending to the elements of change; we must work at it. We must stretch individually and organizationally.



Leading by Convening means we...

Meet people 'where they are'



Leading by Convening means

we....

Bring people together
Around the issues



Leading by Convening means we....

Discover

why this is
important

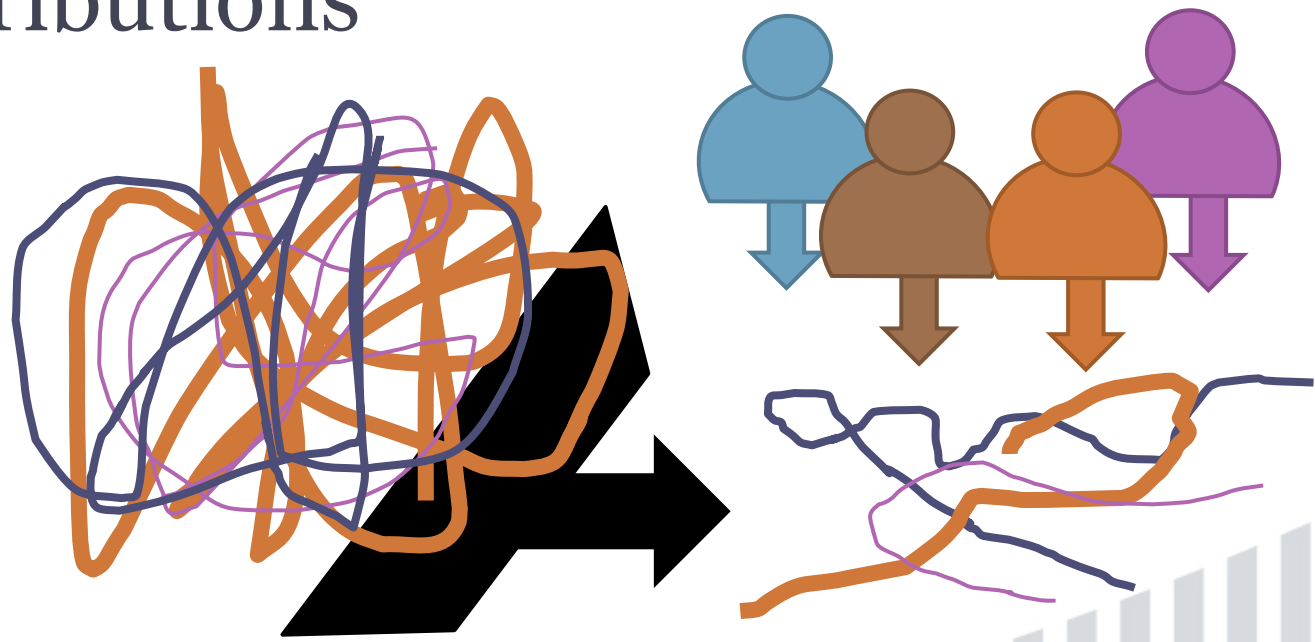


how it will
improve
practice

Leading by Convening means

we....

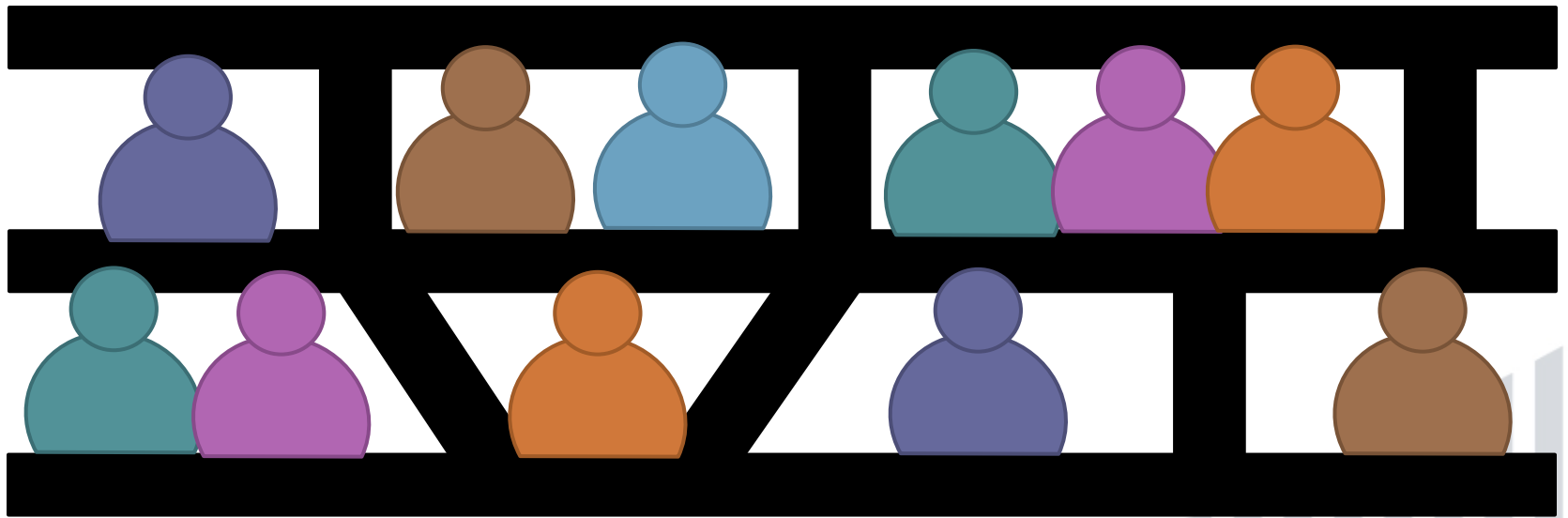
Translate challenges into contributions



Leading by Convening means

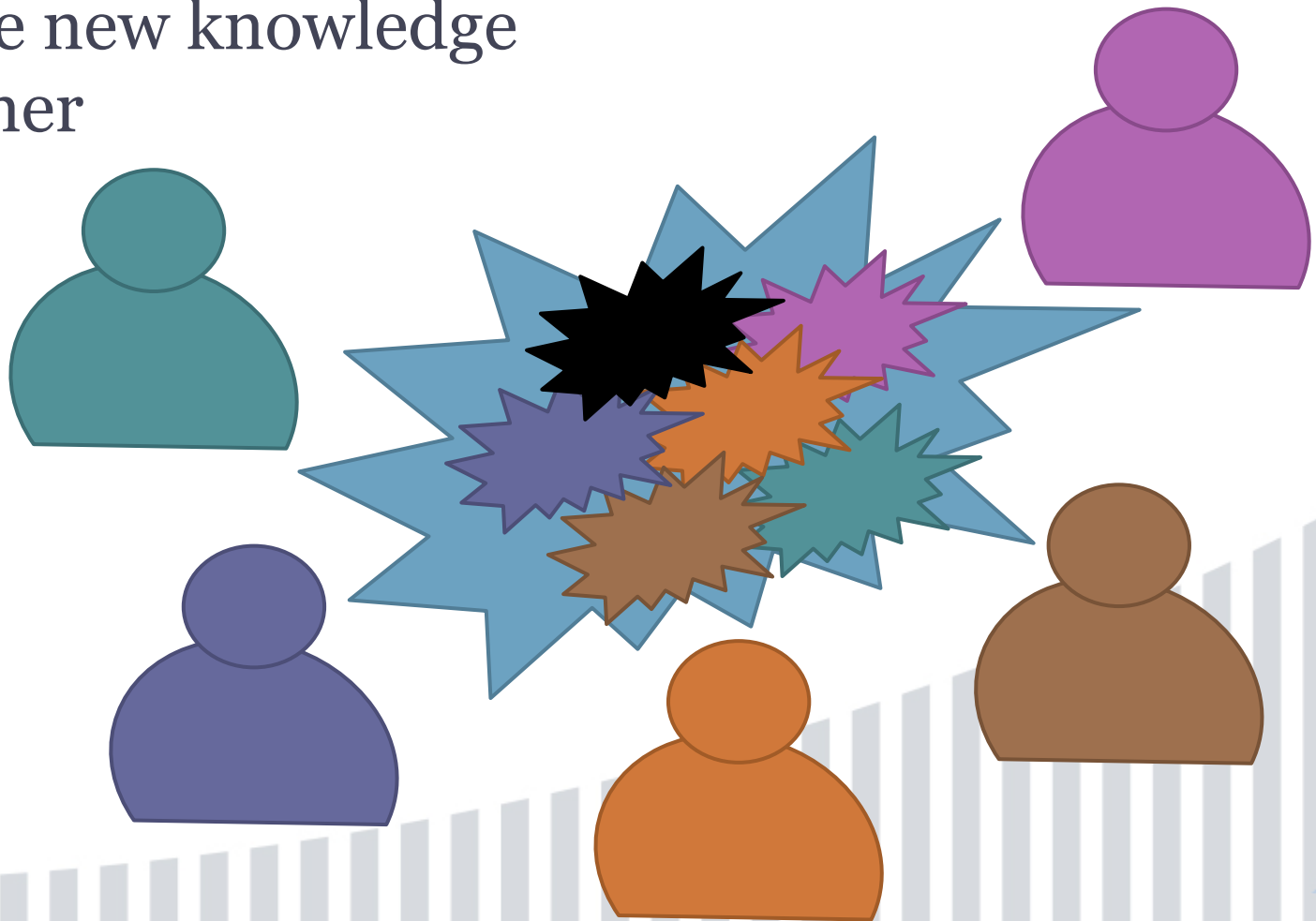
we....

Help people 'lead in place'



Leading by Convening means we....

Create new knowledge
together



Leading by Convening means we....

Solve complex
issues

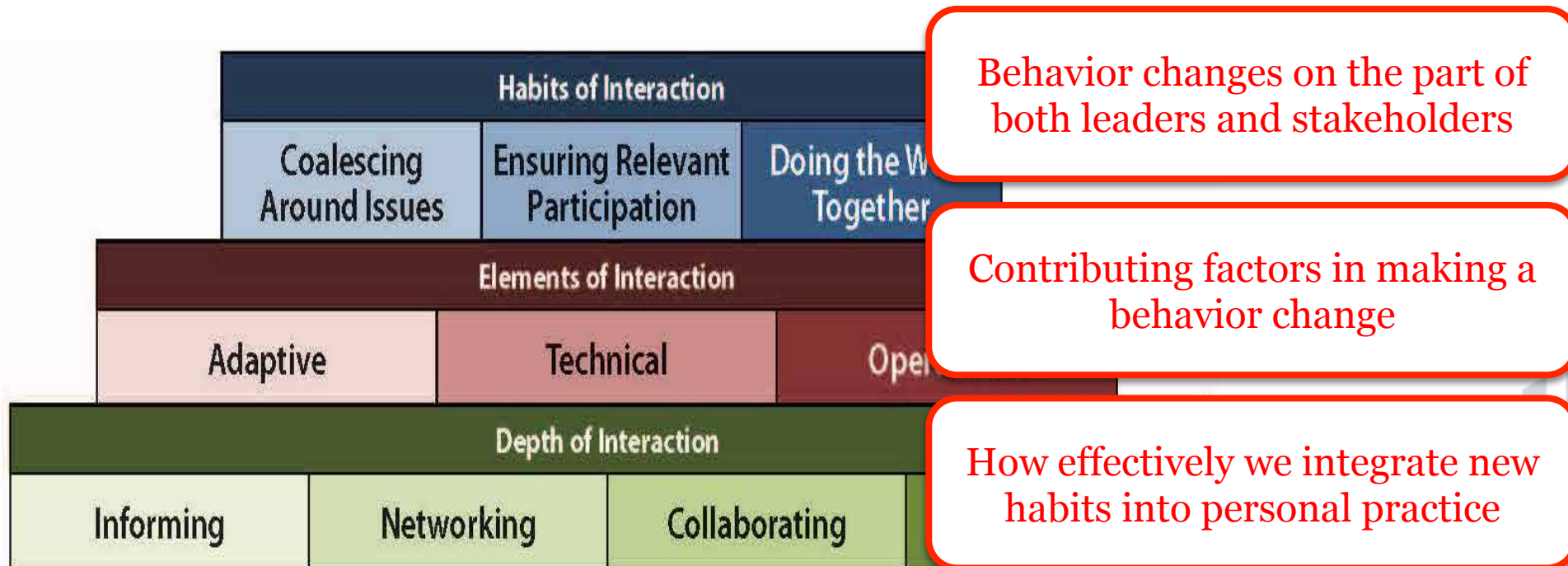


Leading by Convening means we...

Cultivate the habit of
collaboration



Leading by Convening Framework



Habits of Interaction

Coalescing Around
Issues

Ensuring Relevant
Participation

Doing the Work
Together



Habits of Interaction

Coalescing
Around Issues

Ensuring
Relevant
Participation

Doing the
Work Together

Elements of Interaction

Adaptive

Technical

Operational

Depth of Interaction

Informing

Networking

Collaborating

Transforming



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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Researching and agreeing on relevant data.	Personal and professional experiences (anecdotal) are the primary source of evidence for [redacted]. 70%	Stakeholders consider what other data beyond personal stories could be a source of evidence and begin collecting [redacted] data and resources. 30%	Stakeholders identify relevant data from across disciplines and examine for [redacted] lines for understanding (collective analysis). 40%	Through consensus, stakeholders agree on the anecdotal and research data from various perspectives and sources relevant to the issue.
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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%	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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Researching and agreeing on relevant data.	Personal and professional experiences (anecdotal) are the primary source of evidence for 70%	Stakeholders consider what other data beyond personal stories could be a source of evidence and begin collecting 60% that data and resources 30%	Stakeholders 100% relevant 40% cross-disciplinary 40% examine for 40% lines 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 20% to the discussion, bringing in other perspectives 90%	Stakeholders 80% contribute to and create shared vocabulary 10% reach across systems, 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.
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Elements of Interaction

Adaptive

Technical

Operational

Habits of Interaction

Coalescing
Around Issues

Ensuring
Relevant
Participation

Doing the
Work Together

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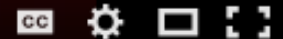
Dr. Ronald Heifetz



Center For Public Leadership
Harvard University

Adaptive vs. Technical

0:11 / 2:43



Elements of Interaction

Adaptive

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Transforming

Depth of Interaction

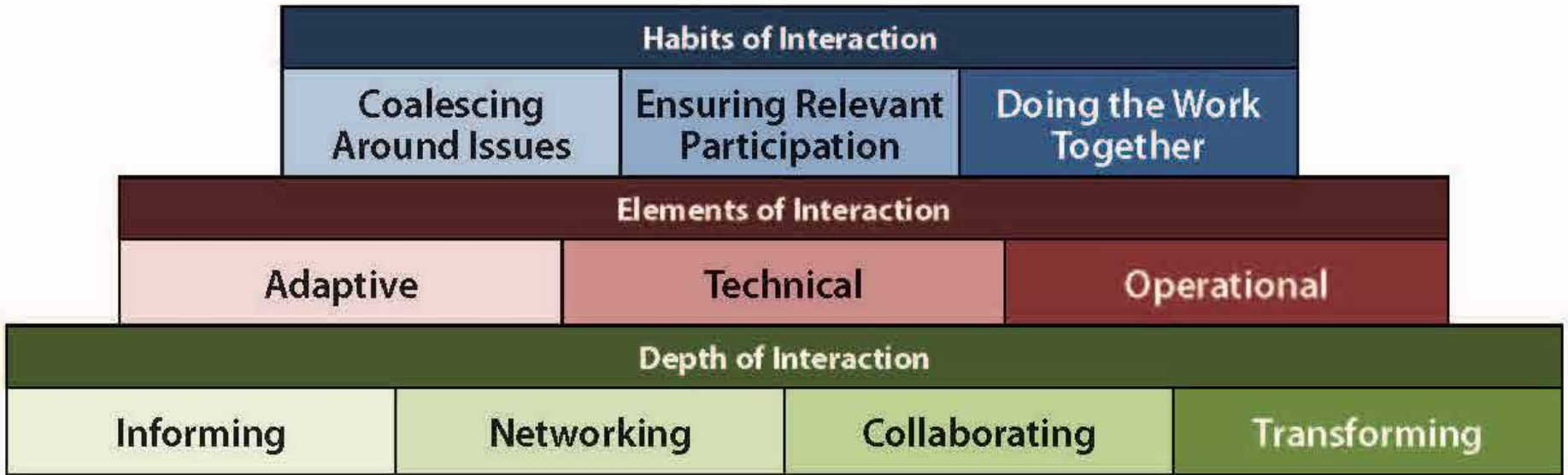
Informing

Networking

Collaborating

Transforming





Bringing it All Together...

Individual Reflection

Leading by Convening

- FREE pdf version of LbC workbook is available online
 - Ideapartnership.org
- You may also order the workbook with a CD version of the workbook for printing
 - Also by contacting the IDEA Partnership

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