



THE ART OF CONVENING:

AUTHENTIC ENGAGEMENT
IN MEETINGS, GATHERINGS,
AND CONVERSATIONS

PREVIEW EDITION

by Craig and Patricia Neal
with Cynthia Wold



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A community dedicated to creating
a world that works for all

INTRODUCTION

The role of the Convener is to gather and hold the people.

It was a remarkable meeting of senior-level women executives, gathering to explore the notion of convening as a leadership competency. I was the Convener, but it was clear from the outset that these women were used to running their own show. Many had grown into their leadership in results-dominated environments, driving definable goals and outcomes, where listening skills and vulnerability were not often appreciated or wanted.

As the Convener, I had done a considerable amount of preparation, internal and external—but I have to admit, I was nervous. Most of those present were not familiar with Heartland's work and had never experienced the Art of Convening—and many were cutting-edge leaders in their own right, with very defined ways of doing things. I knew I would be challenged in this practice.

After the introductions and context setting, we gathered in a large circle. I reminded myself that my intention here was to bring authentic engagement to the gathering and to set aside any other motives that could interfere with that intention. Then I asked that each woman in turn speak to an important question she was dealing with as a leader. As each spoke, their responses deepening with each voice, I was reminded of why I love to do this work.

A few common themes emerged: “How do I have to change to bring about the change I want to see in my organization?” “How do I create authentic connections with my people when I rush from meeting to meeting?” “I’m tired of doing things the same old way, but don’t know what else there is.”

Once everyone had spoken, the majority welcomed the opportunity to take a deeper dive into their challenges. The room had become electric with energy. A window had been opened to a conversation of meaning and personal consequence. And some of the participants showed palpable discomfort.

There were many competing agendas in the room, and midway through the afternoon, I lost my internal focus and lost my way, getting off-track from the agenda. At this point, a key leader left the room without comment, obviously disturbed. A flash of anxiety swept over me as my stomach tightened. Would the group be able to hold together? Would we be able to complete the day?

After years of witnessing the phenomenon of group breakdown, I knew that I had to stay present. I focused again on my intention to bring authentic engagement, and suspended my judgment of others in the room and, more important, of myself. I was back on track to complete the day's agenda. The group's comfort level gradually increased, and “ahas” and nuggets of wisdom emerged. The group seemed to feel an understanding and appreciation for being together in authentic conversation.

At the end of the day, we closed as we had opened, hearing each voice. Although some people still expressed discord and disbelief, most of us appreciated the experience we had together.

Comments ranged from

“This would never fly at my office—they’d think I was nuts.”

“What does this really have to do with business?”

to

“I have the courage to think differently and act on it.”

“Hearing all the voices is a game-changer for me.”

“My intention is to create purposeful meetings with mindfulness and presence.”

What many of us began to see was a vision of leadership that is enhanced by the capacity to slow down for authentic engagement, and to create authentic relationship, which is at the core of why convening with intention matters.

—Patricia Neal

In 1995, Craig and Patricia Neal founded Heartland Inc., an organization offering a different kind of service—connection. As the mission states: *Heartland convenes conversations, programs, trainings, and communities of engagement to practice the skills of the intentional leader, dedicated to creating a world that works for all.*

Heartland has created and developed, among other programs, the Thought Leader Gatherings, a 13-year-old membership-based community of engagement for leaders; Heartland Network, a global online social media leadership community; and a suite of the Art of Convening (AoC) Trainings offering the principles, practices, and applications of convening. This book is the first public sharing of the AoC model.

Often, *convening* is used as a synonym for facilitating gatherings and meetings. Heartland has been differentiating convening from facilitating and leading meetings since its founding. By definition, *facilitation* is “the process of making something easy or easier,”² whereas *convening*, for Heartland, has come to mean the art of gathering and “holding” people, in a safe and generative space, for the sake of authentic engagement each time we invite people together, whether virtually or in-person.

After many years of hosting national conferences and meetings and convening scores of Thought Leader Gatherings, we realized that we needed to write the “recipe” for how to convene. This book examines the art and practice of gathering people for the sake of authentic engagement, which we believe produces better outcomes than could be obtained otherwise—whether for fun, profit, alignment, dispute resolution, insight, wisdom, brainstorming, or problem solving. It addresses the essential principles and practices for those called to convene and lead meetings and gatherings, as well as for

One way to encapsulate the leadership required to create an alternative future is to consider the leader as primarily a convener—not leader as special person, but leader as a citizen, sometimes with legitimate power, willing to do those things that can initiate something new in the world. In this way, ‘leader’ belongs right up there with cook, carpenter, artist, and landscape designer. All of us can develop this ability with a small amount of teaching, and an agreement to practice—the ultimate do-it-yourself movement.

-Peter Block¹

those of us who don't seek to lead all the time but wish to serve in the best way possible when leadership is called for.

APPLICATIONS OF CONVENING

Although the Art of Convening was developed as a leadership model, many other applications have emerged. Once we learn how to be a Convener, we may constantly find opportunities to bring authentic engagement—not only to our work lives, but also to our neighborhoods, book groups, friendships, families, and personal relationships.

My husband planned a family birthday party at our house for my 15-year-old stepson. There were eight of us at the dining room table, including the two teenage brothers, engaged in three or four simultaneous conversations—teen one-upping a prominent one. In our family, attempts to be “in charge” are often met with great resistance, both overt and covert, so “stepping in” can be risky. I wondered, though, whether my learning about being a Convener could help us have a different kind of interaction and connection.

Through dinner I thought about how I would like to be in relationship with the people at the table. I clarified my intention while planning how to ask for a change in the usual family free-for-all to a more intimate way of being together. It was important to me that my motives were pure. Was I acting out of annoyance with the teenagers, a desire to assert my authority, or something hidden or unkind that could bring about a result I didn't want? I consciously set aside any ulterior motive I could think of and focused on the intention to bring authentic engagement to the group. That's all.

I finally asked everyone if it would be OK if we went around the table, each expressing our favorite thing about my stepson as a way to honor him on his birthday. The immediate and unequivocal response from the birthday boy, however, was “NO! I don't want to do that.”

Knowing that proceeding in a way imposed by me wouldn't accomplish what I wanted, I let it go, cheerfully saying, “OK.” But my intention was out there, and surprisingly, that wasn't the end of it. Someone suggested that perhaps I could say what I was thinking about the birthday boy without requiring everyone else to do so. Everyone listened politely while I expressed, sincerely, what I really appreciated about my stepson, and I wished him a happy and satisfying day. It was a different kind of talk. Then I let it go, again.

The intention I had clarified moments before seemed to get legs and a life of its own at that point. Another family member said, “Hey, I'd like to say something, too.”

One by one, everyone around the table honored my stepson with a sincere expression of appreciation for something they liked about him. When we finished speaking, there was a noticeable shift in the energy of the group, leaving us together in a different, more connected way.

This is a precious gift of the Art of Convening.
—Cindy Wold

TECHNOLOGY OF RELATIONSHIPS

At the foundation of the Art of Convening is a “technology of relationships.” If you hold as true that each interaction with another human being is an opportunity for authentic engagement or relationship, that interaction is enhanced. *The Art of Convening* is a guide to help us integrate our personal values into positive relationships that then make possible the best outcomes for our gatherings, whether for communities, organizations, or the world.

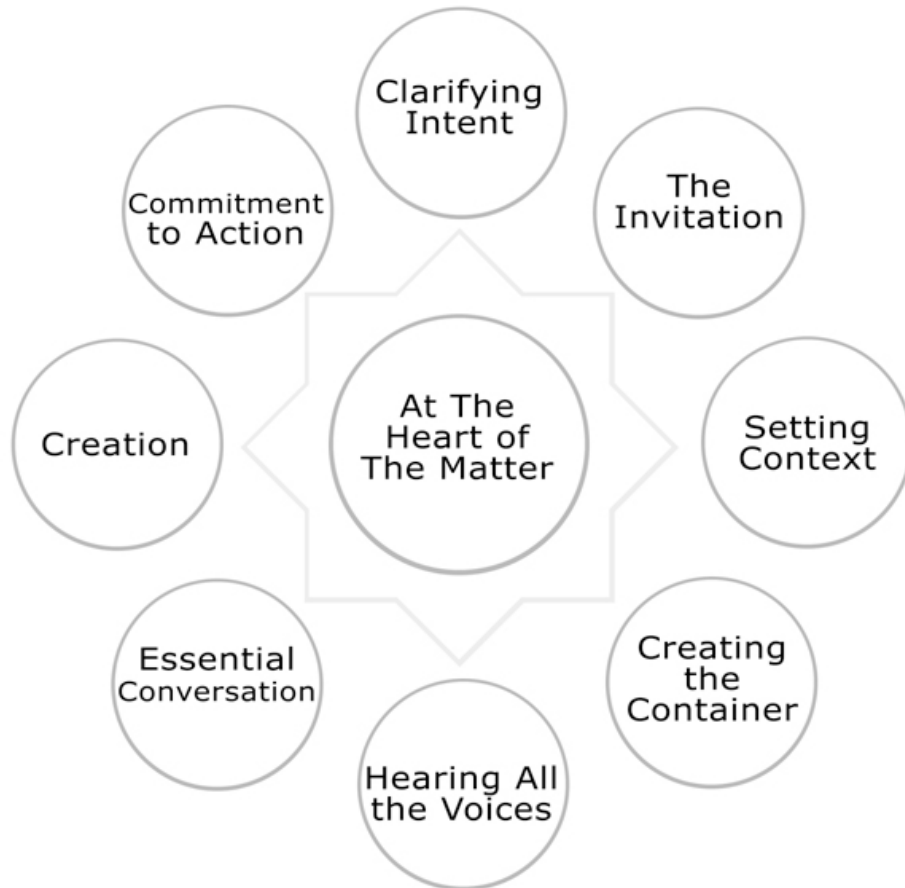
We use a Convening Wheel model to explore the convergence of the inner and outer worlds of Conveners—those who engage others in meaningful meetings, discourse, and conversations. The integration of the personal practices of the Convener with the practical concerns of convening meetings and gatherings is the unique realm of the Art of Convening.

INNER JOURNEY

We discovered while developing the Convening Wheel that the outer, physical, design-oriented delivery considerations in convening always seem to follow the same path as the inner life of the Convener. That is why the inner considerations are so prominent in our convening model. We believe that the Convener is a leader whose power and effectiveness are rooted in personal development, integrity, and coherence. When we tap into the generosity inherent in most people, the wealth of knowledge and wisdom in any gathering is revealed.

To illustrate the concepts of the Art of Convening, we’ve developed the Convening Wheel model.

Convening Wheel



THE CONVENING WHEEL

The Convening Wheel is the form we use to visualize the inner and outer considerations of the Convener. The parts or phases of the Convening Wheel, the center and eight outer points around the perimeter, are called *Aspects*. We start at the center with *At the Heart of the Matter* and then move up, or north, to *Clarifying Intent*, then travel clockwise all the way around to *Commitment to Action*. We follow a path that reflects both the *presence* and *action* of the Convener. The Wheel reveals an intuitive, logical progression of actively engaged relationship.

You may ask, “Do I really have to do all of these steps?” The short answer is: to get the best result, yes; to see an improvement, no. Begin where it makes the most sense, with a commitment to try following the Wheel as your understanding and practice grows.

Despite our best intentions to use the whole Convening Wheel model, we understand that in our everyday world, sometimes an impromptu conversation or gathering surprises us. Sometimes our active lives deliver us to a gathering unprepared; or we did not call the meeting, so we arrive feeling that nothing can be done to modify or change the meeting form.

Even so, the power and capacity of the Art of Convening will continue to grow and permeate our gatherings as we utilize and practice it when we can. Every time we practice the Art of Convening, we strengthen the habit, much like driving a car. As with driving, after a while, our bodies and minds operate in such a way that the doing of it takes less and less of our conscious thought, but we become more and more proficient.

Here are the nine Aspects of the Convening Wheel, with a definition of each.

At the Heart of the Matter

Who I am in relationship with others.

Clarifying Intent

The alignment of our intention with the purpose of our engagement.

The Invitation

A sincere offering to engage that integrates purpose and intent.

Setting Context

Communicating the form, function, and purpose of our engagement and intent.

Creating the Container

Creating the physical and energetic field within which we meet.

Hearing All the Voices

Each person speaks, is heard, and is present and accounted for.

Essential Conversation

Meaningful exchange within an atmosphere of trust.

Creation

Something new that emerges from engagements of shared purpose and trust.

Commitment to Action

An individual and/or collective agreement to be responsible and accountable for the way forward.

The structure of the Convening Wheel illustrates the various Aspects of convening as a whole. As we progress through the Aspects around the Wheel (whether tentatively, fitfully, or gracefully), we cycle through the steps and considerations using this circular form to guide our way of being and doing.

The Convening Wheel is flexible. Rather than being limited to a sequential progression, we are able to correct our course at any juncture along the path. As in our individual lives, we at times need to hit the “reset button” to refocus or step back a few paces to a place of balance and equilibrium. This is also true in our relational lives as leaders and

Conveners. The path of the Convening Wheel isn't rigid or static any more than are our relationships.

Each of the nine chapters in this book covers an Aspect of the Convening Wheel. Each Aspect builds on the previous and provides a bridge to the next, creating a cycle of wholeness in our relationships and engagements. We examine each by looking at three core elements: the possible Challenge we may face in implementing it, the core Principle behind it, and the Essential Questions that shape our understanding. We also include a Making It Real discussion that explores common situations we've come across when engaged in an Aspect of the Convening Wheel.

Here are the definitions of the core elements of each Aspect to further your understanding:

CHALLENGE

The fundamental barrier that we must see in order to continue to the next Aspect.

PRINCIPLE

The foundational value that informs an Aspect of the Wheel.

ESSENTIAL QUESTIONS

A question or questions one asks in an Aspect of the Wheel that illuminate the core Principle.

Each chapter concludes with helpful reminders that summarize the major ideas and themes including the sections *Aspect Strengthening Exercises* and *Journaling Questions* for active engagement and practice.

The Art of Convening can produce breakthrough outcomes that are satisfying and extraordinary for the participants and their organizations and communities. The guidelines in this book are for those of us seriously engaged in and committed to making a life-changing difference in our own lives and the lives of those we gather.

Through the principles and practices of *the Art of Convening*, anyone can learn that meaningful connection and engagement are not only possible but also imperative for obtaining sustainable, satisfying results in our businesses, organizations, communities, families, and personal relationships.

The chapters that follow will take you through the Aspects one by one while exploring each in detail.

Our gratitude goes out to you for your willingness to step forward with us on the Convener's journey.

—Craig and Patricia Neal, Cynthia Wold