

CONVENING CHECKLIST: 9 Steps to Collaboration

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|  | <p>1- At the Heart of the Matter</p> <p><input type="checkbox"/> What is the core purpose of the meeting? State why you are meeting. List outcomes and expectations.</p> |
|  | <p>2- Clarifying Intent</p> <p><input type="checkbox"/> What is the intent of the meeting? What will you do? Create a design or agenda for your meeting.</p> |
|  | <p>3- The Invitation</p> <p><input type="checkbox"/> Who will you invite? Why should they come? How will they benefit by attending? How will you benefit if they attend?</p> |
|  | <p>4- Setting Context</p> <p><input type="checkbox"/> How will you describe the form, function and purpose of the meeting once the meeting has begun?</p> |
|  | <p>5- Creating the Container</p> <p><input type="checkbox"/> In planning your meeting, imagine the physical space in which you will meet. Describe that here. What materials and aids will be in place? Be specific. What are the norms and agreements of meeting?</p> |
|  | <p>6- Hearing All the Voices</p> <p><input type="checkbox"/> In what way will each person have a chance to speak or communicate? What is the question you will ask to get the meeting started so people can be ready to participate?</p> |
|  | <p>7- Essential Conversation</p> <p><input type="checkbox"/> How will you facilitate participant engagement? What needs to be in place for full engagement and how will you know when it occurs? What are the success factors of fully engaged staff and participants?</p> |
|  | <p>8- Creation</p> <p><input type="checkbox"/> What are the new and innovative outcomes you wish to achieve in this meeting? List potential opportunities and possibilities.</p> |
|  | <p>9- Commitment to Action</p> <p><input type="checkbox"/> Out of this meeting, what significant commitments, responsibilities and accountabilities do you expect from yourself and others? How will these make a difference?</p> |