

# The Art of Convening T3

## Case Study

2019

# Whole Person Leadership for Women



courage

There's a thread you follow. It goes among  
things that change. But it doesn't change.

People wonder about what you are pursuing.  
You have to explain about the thread.

But it is hard for others to see.  
While you hold it you can't get lost.

Tragedies happen; people get hurt  
or die; and you suffer and get old.

Nothing you do can stop time's unfolding.  
You don't ever let go of the thread.

**“The Way It Is” by William Stafford**

purpose



courage

“Everything that exists has a purpose.

We were born for a reason and we live in a purposeful world.

Every one of us has unique gifts and a purpose to use those gifts to contribute value to that world.”

Richard Leider, *The Power of Purpose*

purpose

impact



accountability

# The Convening Wheel

purpose



impact



staying  
connected

## At the Heart of the Matter

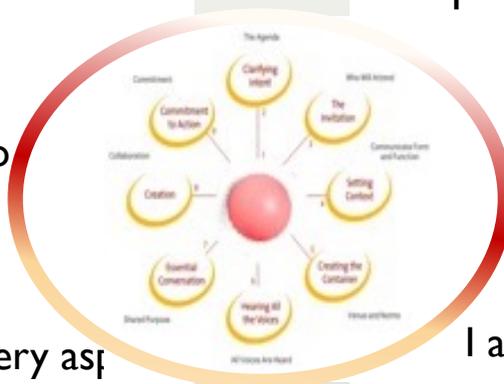
courage

**Outer:** What is the core purpose of the meeting?  
State why you are meeting, outcomes and expectations.

In 2017, I was encouraged to create an offering to address the longing and desire for women to bring more of who they are to how they are in the world.

The manifesto: Being a "whole" leader calls on every aspect of our selves. It calls us to find the courage to bring all of who we are into everything we do. We gather to remember, embody and reflect what matters; wholeness starts with each of us.

With a faculty team of 5 "Stewards" we endeavored to design a process for our collaborative + a program offering to women leaders.



**Inner:** Who am I to be in relationship and what is our purpose together?

*My Passion:* opening doors for others, exploring wholeness, learning

*My Purpose:* Bringing people together for positive impact for all boats to rise

I am a leader to women who want to join me in courage to bring all of who we are into what we do.

I am following my thread to be real, authentic, vulnerable, accountable, available.

I wish to experience and express the power of convening as a tool for transformation.

authentic engagement



Whole Person Leadership for Women

d o u b t

# Clarifying Intent

t r u s t

**Outer:** What is the intent of the meeting? What will you do? Create a design or agenda for your meeting.

The Whole Person Leadership for Women program is an opportunity to bring a cohort of accomplished women to journey together so that we all can learn to connect more deeply to our power of purpose and lead more fully from a whole person perspective.

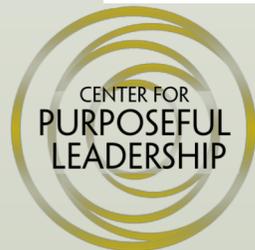
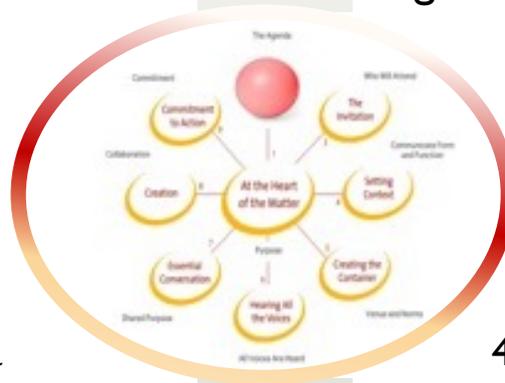
Convening is a structure to connect your purpose in authentic relationship with others. All meetings are designed using the Convening Wheel: both Steward meetings, as well as participant sessions.

**Inner:** Who am I to be and what are we to do together?

The WPL program is a co-owned, co-convened, collaborative program. CPL is the “home” for Whole Person Leadership for Women. I am the lead convener and collaborator with 4 Stewards who bring this program alive.

We believe in the power of convening to create form, function and outcomes of substance and meaning.

Our intent: life- and spirit-transforming experiences for women leaders.



s u b s t a n c e

rejection

## The Invitation

hospitality

**Outer:** Who will you invite? Why should they come? What is in it for them?

Women who want to be more authentic and powerful in their various leadership roles: at home, at work and in their communities.

Clearer self-awareness: A clearer sense of the deeper values that inform your leadership

Leadership growth: An understanding of how purpose unleash and strengthen your leadership effectiveness and aspirations.

Culture change: Influence and strengthen relationships among leaders that share a common goal for whole person leadership.

**Inner:** What is my sincere gesture that integrates my purpose and intent?



I am a steward, catalyst and leader of those who are willing to step forward to explore leadership, and what it means to be a woman leader as a whole person, in a new way.

Leadership is always an inside job. The questions at the heart of the matter for me:

How do my life and leadership fit together?

How best is my purpose to be shared?

What is the potential of a life fully lived on behalf of others?



full presence

leadership

Whole Person Leadership for Women

a s s u m e &  
d o o m

## Setting Context

p o t e n t i a l

**Outer:** How will you describe the form, function and purpose of the meeting once the meeting has begun?

Convening is a structure to connect your purpose in authentic relationship with others. Meetings are designed using the Convening Wheel.

Within a convened meeting format we focus on whole-person, purposeful leadership in real-time application, and the power of creating an intentional engagement strategy for yourself and those you lead.

Pre and post-surveys are an invitation to participate and collaborate.

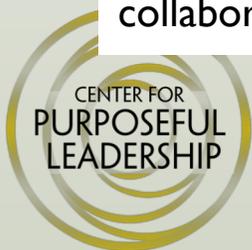


**Inner:** What is my clear articulation of who we are to be and do together?

We will gather as a cohort to share expertise and life learnings that will benefit each person, everyone they lead or work with., everyone who matters to them.

We will work with each other in a safe and encouraging environment to access more of our whole-person potential and grow our inherent leadership capacity.

WPL is an opportunity to pause and take intentional time out from day-to-day life, which can be overwhelming, to consider our purpose and prepare for what is next for each of us and our leadership.



a c t u a l i z a t i o n

will

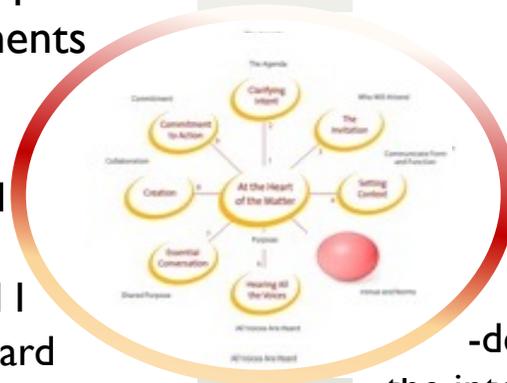
# Creating the Container

boundaries

**Outer:** Describe the physical space in which you will meet. What materials and aids will be in place? Be specific. What are the norms and agreements meeting?

Each virtual and in-person meeting is co-designed with the Stewards. Claudia and I are “point” to create the structure, flow and design. Claudia and I are the primary conveners, supporting each Steward as a content provider.

We create each container for maximum safety and inclusion with the agreements on the next slide. For in-person gatherings, we use spaces with natural lighting, access to natural beauty, good food.



**Inner:** What is my role in creating a safe and enlivening space in which to do our work?

A recognition that before I can create safety for others, I have to create safety for myself.

I affirm collaboration as a structure of belonging and delivery of intention to serve;

- design of each session with the Convening Wheel;
- the intention for all voices to be heard, all boats to rise;
- the agreements that hold us each time (outlined below).

Reading the names of the participants before each session opens connects us energetically and acknowledges each person’s importance and contribution.



safety and openness

Whole Person Leadership for Women

s a f e t y

## Creating the Container

b o u n d a r i e s

### **AGREEMENTS** (Our terms of engagement as a group)

Concrete and energetic agreements

Missing or being late to a session:

- If you are unable to make a session let us know as far in advance as possible so we may plan accordingly.
- All sessions are recorded for review.
- If you are late to a session, please join the group and announce your presence.
- These protocols are designed to maximize the quality of our time together.
- It is important that you attempt to be on a session even if you are late, cannot stay for the duration, or need to connect from a challenging location. Making an effort to participate in each session is a high priority. You will not inconvenience or interrupt the group. On the contrary, your show of commitment will be an inspiration to all.



☀️ We agree to be fully present, free from distractions (electronics, etc.).

☀️ We listen deeply with the intent to understand and be of service.

☀️ We presume positive intent.

☀️ We come with open mind - notice our assumptions and judgements.

☀️ We agree to suspend certainty so fresh ideas, creativity and surprises can emerge.

☀️ We honor confidentiality. What is said here is held with respect and not shared by name without permission.

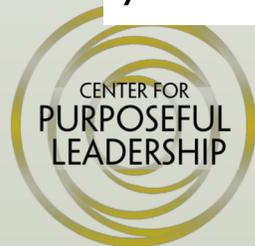
☀️ We know that each contributes to the whole and a positive outcome.. We speak our wisdom from our wholeness.

☀️ We allow the conversation to slow to the pace of the heart and of life.

☀️ We can ask for what we need.

☀️ We humbly ask for your permission to convene.

r e s p e c t



i m p a t i e n c e

## Hearing All the Voices

e a c h v o i c e

**Outer:** How will you facilitate each person to speak? What methods and practices will allow for the full expression of all participants?

We provide various modalities for participation: Stringing the Beads, Community Circle, breakouts in pairs, or triads/quads with a Steward to convene the conversation.

We preface with a transition of some sort, such as a centering breath or more.

We ask questions that connect the head and heart, spirit and soul, through activating gratitude, empathy, presence.

We pay attention to learning styles and preferences to encourage active engagement.



**Inner:** Who are we and what have we come to say and do together?

We are welcoming as leaders and learners simultaneously, not the “experts.” We look for:

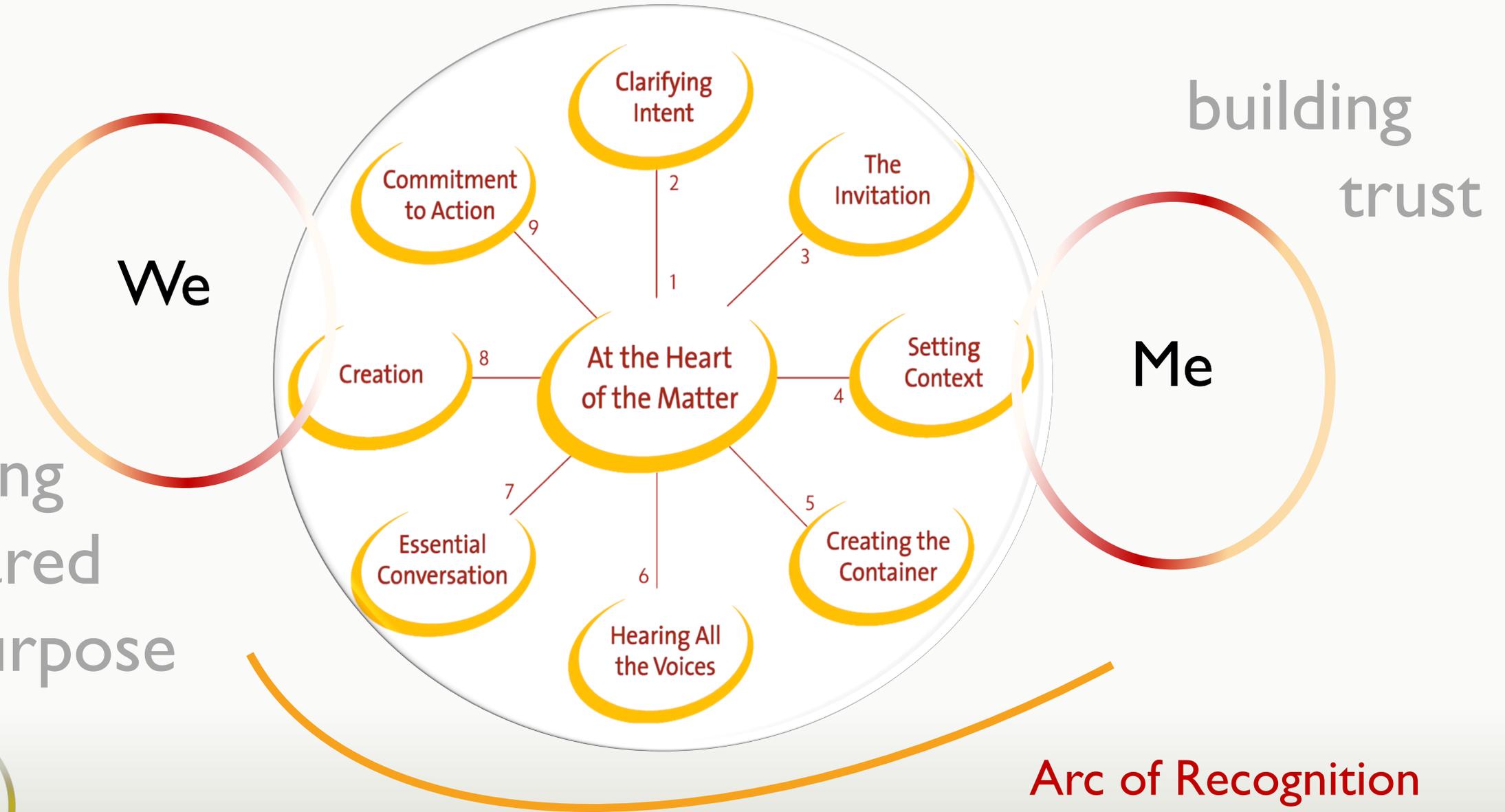
Individual wisdom: surfacing and expressing purpose and gifts through realizing what gives meaning and purpose.

Collective wisdom: we gain insights and learnings from others who are also striving to learn, grow and apply for personal and professional impact.

a u t h e n t i c w i s d o m



Whole Person Leadership for Women



## Essential Conversation

**Outer:** What are the success factors for a fully engaged meeting? What needs to be in place for full engagement and how will you know when it occurs?

Each Steward leads through multiple roles as co-designer and co-convener, as well as presenting content from their area of expertise. This creates an active and safe learning container.

We have measurement tools for participation. Completion of these exercises are important. The exercises and sessions are designed to encourage insights and activate aspirations, that are applied within a concrete output we call the Leadership Blueprint.

The questions that are asked, and completion of exercises like the Napkin Test and Blueprint are indicators of engagement and understanding.



**Inner:** Has the ground been adequately laid for essential conversation to occur? What wisdom am I looking for and is already present?

Acknowledge that we each are leaders and learners simultaneously;  
Create the container for safety;  
Invite the reflections, perspectives, and expertise of all who have gathered;  
Ask for participation in the spirit of “there are no wrong answers”;  
Look for moments of inspiration, fun, aspiration;  
Invite the challenges to be considered within the container of safety.

# Whole Person Leadership



c o u r a g e

l e a d e r s h i p



**Whole Person Leadership for Women**

disengagement

## Creation

movement

**Outer:** What do you wish to create that is new/innovative in this meeting? List potential opportunities/possibilities that stretch you.

Acknowledge that we each are leaders and learners simultaneously;

Create the container for safety;

Invite the reflections, perspectives, and expertise of all who have gathered;

Ask for participation in the spirit of “there are no wrong answers”;

Invite the challenges to be considered within the container of safety.

Surface the common themes, and individual contribution.

Consider how to scale beyond the two recent cohorts.

What is the “field” of whole person leadership that is to be developed?



**Inner:** What are we to create together and how will I recognize and harvest the wisdom being created?

A co-creative field of emergence, authenticity, vulnerability, and accountability.

We are to co-create positive change and impact on behalf of ourselves and a larger purpose.

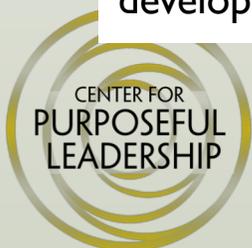
The Stewards hold an intention to

- create and develop a new field of awareness and capacity
- co-create positive change and impact
- Invite the space and channel of transformation for each of us

Look for moments of inspiration, fun, aspiration, challenge —all indicators of growth.

meaningful contribution

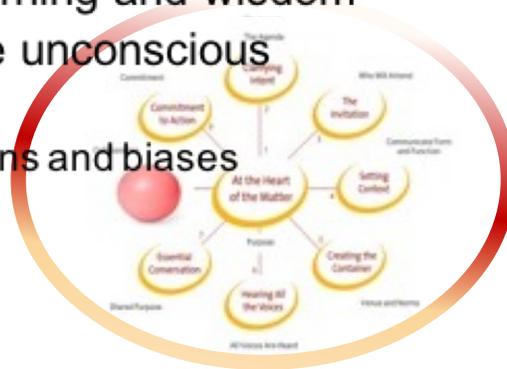
Whole Person Leadership for Women



# Creation

## Indicators of Success: how we serve our program participants

- Co-create a compassionate and supportive environment for healing, renewal and uplift
- Share our theoretical and practical learning and wisdom
- Bring into consciousness what may be unconscious
  - With love and understanding
  - Especially social and cultural assumptions and biases
- Allow for real transformation
  - Understanding of different perspectives
  - Allow space for shifts and realizations
- Be lights for each other
  - Access and express the fullness of our divinity and purpose
- Co-create positive change
  - A better world ecologically, culturally, socially and personally
  - Especially for future generations



**In essence, we are to co-create positive change and impact**

a b s e n c e o f

# Commitment to Action

a l i g n m e n t

a c c o u n t a b i l i t y

**Outer:** What significant commitments, responsibilities and accountabilities do you expect from yourself and others from this meeting that make a difference?

Each person will complete their assignments, such as the surveys, Napkin Test, the I6pf assessment, Purpose Checkup, etc.

We end each session with a CTA that is builds toward completing their Leadership Blueprint and Purpose Plan by program end.

There will be significant shifts in the interactions and questions between us and the participants, between the participants and their lives.

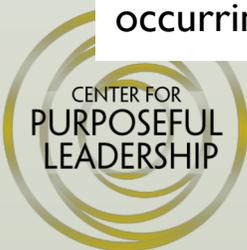
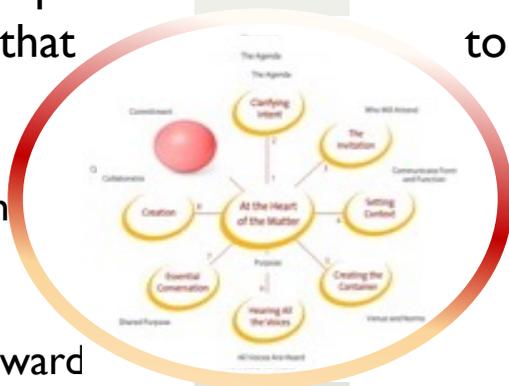
We will ask for examples of stretch and courage that are occurring and are sustainable into the future.

**Inner:** What is needed to allow for the highest level of commitment and responsibility and accountability to occur?

Be the commitment I want from others.

Continued cohesion and trust between the Stewards throughout a 6-month journey of delivery, but a year-round commitment of developing and building this offering and “field”.

We will co-create an ever-expanding relational container and culture of uplift (founded on love, acceptance, compassion and encouragement) which nurtures us fully and compels us to explore with curiosity, openness and courage.



c o m m o n f u t u r e

Whole Person Leadership for Women

*Whole Person Leadership* is a full expression of authenticity and wholeness grounded in purpose.

What

*full expression of  
gifts, talents,  
purpose*

c o u r a g e

t r u s t



Why

*meaningful,  
life with  
impact of  
service*

l e a d e r s h i p





# *The Whole Person Leadership Manifesto*

purpose

What

Leadership based on your personal values and life experiences, as well as understanding your strengths and growth points.

impact

Why

A purposeful life lived and fully shared makes for meaningful, sustainable leadership.

accountability

How

Convening is a structure to connect your purpose in authentic relationship with others.

