

---

# Learning in Landscapes of Practice

---

Boundaries, identity,  
and knowledgeability  
in practice-based learning

Edited by Etienne Wenger-Trayner,  
Mark Fenton-O'Creevy,  
Steven Hutchinson, Chris Kubiak,  
and Beverly Wenger-Trayner

 **Routledge**  
Taylor & Francis Group  
LONDON AND NEW YORK

First published 2015  
by Routledge  
2 Park Square, Milton Park, Abingdon, Oxon OX14 4RN

and by Routledge  
711 Third Avenue, New York, NY 10017

*Routledge is an imprint of the Taylor & Francis Group, an informa business*

© 2015 Etienne Wenger-Trayner, Mark Fenton-O'Creevy, Steven Hutchinson, Chris Kubiak, and Beverly Wenger-Trayner

The right of the editors to be identified as the authors of the editorial material, and of the authors for their individual chapters, has been asserted in accordance with sections 77 and 78 of the Copyright, Designs and Patents Act 1988.

All rights reserved. No part of this book may be reprinted or reproduced or utilised in any form or by any electronic, mechanical, or other means, now known or hereafter invented, including photocopying and recording, or in any information storage or retrieval system, without permission in writing from the publishers.

*Trademark notice:* Product or corporate names may be trademarks or registered trademarks, and are used only for identification and explanation without intent to infringe.

*British Library Cataloguing in Publication Data*

A catalogue record for this book is available from the British Library

*Library of Congress Cataloging in Publication Data*

Learning in landscapes of practice : boundaries, identity, and knowledgeability in practice-based learning / edited by Etienne Wenger-Trayner, Mark Fenton-O'Creevy, Steven Hutchinson, Chris Kubiak, and Beverly Wenger-Trayner.

pages cm

Includes bibliographical references and index.

ISBN 978-1-138-02218-8 (hardback)—ISBN 978-1-138-02219-5 (paperback)—ISBN 978-1-315-77712-2 (ebook) 1. Professional education. 2. Professional practice. 3. Professional learning communities. 4. Experiential learning. I. Wenger, Etienne, 1952—

LC1059.L42 2014

378'.013—dc23

2014002229

ISBN: 978-1-138-02218-8 (hbk)

ISBN: 978-1-138-02219-5 (pbk)

ISBN: 978-1-315-77712-2 (ebk)

Typeset in Galliard

by Keystroke, Station Road, Codsall, Wolverhampton



Printed and bound in Great Britain by  
TJ International Ltd, Padstow, Cornwall

## Systems conveners in complex landscapes

Beverly Wenger-Trayner  
and Etienne Wenger-Trayner

In our role as learning consultants for different organizations we increasingly find ourselves supporting conveners in complex landscapes. Their contexts are different but what drives them is similar: a conviction that new configurations of people and activities will bring about new capabilities. These conveners see a social landscape with all its separate and related practices through a wide-angle lens; they spot opportunities for creating new learning spaces and partnerships that will bring different and often unlikely people together to engage in learning across boundaries. This chapter explores the role of these conveners, the paradoxical challenges they face, the complexity of their work, and the personal traits that seem critical to their endeavor. While our description of what they do is based on an archetype of the successful conveners we have worked with we hope they will recognize themselves in our description of what they do and realize they are not alone. We also hope that others will come to appreciate the subtleties, drive, hard work, and tensions involved. Ultimately we would like to contribute to the emergence of a discipline of convening in complex landscapes.

### Systems conveners: working the landscape

*Systems convener* is the term we are using for people who forge new learning partnerships in complex landscapes. Our emphasis is on the systemic reconfiguring by which these types of conveners open new avenues for learning.

The concept of convening has been used in different ways. Often it refers to the gathering and facilitation of specific events, conversations, or collaboration.<sup>1</sup> Some organizations with a social mission now call themselves 'convening organizations.' It indicates an ideological shift from being providers of finance or expertise to being conveners of people who will work together to find innovative solutions to their common problems.<sup>2</sup> Our focus, however, is on *people* who act as conveners. Our experience suggests that organizations, even when they claim the label of convener, depend on individuals who take leadership in the role, sometimes in the name of the organization, and sometimes in spite of it.<sup>3</sup>

By calling the people we describe here 'systems conveners' we are emphasizing that their concern is more about creating lasting change across social and

institutional systems than about enabling collaboration among individuals. Whatever their official job title they share an ability to see the potential for learning and action in a landscape beyond their immediate scope – and they act on it. They seek to reconfigure social systems through partnerships that exploit mutual learning needs, possible synergies, various kinds of relationships, and common goals across traditional boundaries.<sup>4</sup>

To appreciate the role of convener we should hear about it from the voice of those who are attempting to do it. We include the voices of two people with whom we have worked and who brought a convening approach to their endeavor. We have subsequently interviewed them about their experience. Both were well into their career and although their job title did not include systems convener, they identified strongly with the role.

#### John Hegarty (JH)

When we worked with John he was Head of the Centre for Financial Reporting Reform at the World Bank in Austria. With a background as a chartered accountant, he ran a program of accounting reform and institutional strengthening in South Central and South Eastern Europe. He took a convening approach to the task, bringing together participating countries and entities to improve the reform process across the region.

#### Nancy Movall (NM)

Nancy started her career as an art teacher, became the technology coordinator in her district, and is now a Grant Manager for the state of Iowa, Area Education Agency. At the time of our interview she was coordinating the development of an eCurriculum for teachers whose students were each to have their own laptop under a new state initiative. She was bringing together teachers and curriculum leaders in a number of disciplines to develop the practices they needed in their new classroom.

The chapter is divided into three sections. We start by describing the challenges systems conveners face, often in tension between conflicting demands. Then we frame their work in terms of reconfiguring identities with the modes of identification defined in Chapter 1. Finally we list some personal but paradoxical traits that seem to characterize people who undertake this challenge.

### Convening challenges: reconfiguring complex landscapes

Systems conveners view their work, explicitly or implicitly, as an endeavor to generate new capabilities in their landscape. It is a complex learning process that involves new partnerships among diverse stakeholders. To enable this learning, they attempt to reconfigure the landscape: unlocking unexplored spaces, forging promising partnerships, building bridges, resetting boundaries, challenging established colonies, and creating new settlements.

The landscapes in which conveners operate are complex. The multiplicity of stakeholders bring to the endeavor perspectives, interests, backgrounds,

affiliations, and aspirations derived from different locations and trajectories in the landscape. Here are five dimensions of this complexity:

**Practices.** Stakeholders across the landscape identify with a variety of unrelated, overlapping, and competing practices and their respective communities. They are accountable to different regimes of competence, histories, repertoires, artifacts, languages, worldviews, and personal relationships.

**Institutions.** Stakeholders engage in different practices in the landscape in the context of their various organizations, which have specific missions, projects, policies, structures, and often-complicated politics. These institutions pursue different (and sometimes competing) goals, represent different constituencies, and are under pressure to meet demands placed on them by their own stakeholder groups.

**Scale.** Conveners' endeavors usually cross multiple levels of scale, from the very local, to the regional, national, and in many cases international. Each level of scale represents an aspect of the problem and of the solution. Different stakeholders are invested at different levels of scale and often blame other levels for enduring difficulties. Learning processes need to cross these levels of scale.

**Power.** The landscape is shaped by significant differences in power among practices, groups, institutions, and even individuals. The negotiation of these differences in power to shape what is done in the landscape is a significant dynamic in the forging of new learning partnerships.

**Time.** Time is also a dimension of complexity in a landscape of practice. For conveners the time dimension manifests in two opposite ways:

- **Shifting landscape:** things are constantly changing, people move on, organizations restructure, but there needs to be coherence and continuity of focus.
- **Inertia:** at the same time complex systems have enough inertia that real changes in practice take a long time to become sustainable.

In dealing with these dimensions conveners need to manage factors that are usually in tension and, at times, in real conflict. The tensions inherent in a landscape can present formidable obstacles but also new opportunities to spur creativity. In either case managing them is central to the role of systems convener.

### **Respecting and challenging boundaries**

Boundaries are inherent in landscapes of practice. They reflect the limitation of the human ability for engagement. They simplify things. They serve a purpose.

Practices, institutions, and levels of scale all create boundaries as people are involved in different enterprises. Boundaries are neither good nor bad – just a fact of life. In brokering new partnerships, conveners inevitably confront traditional and enduring boundaries. Their challenge is to get buy-in from across these boundaries, including from practitioners of various communities, their organizations, sponsors, and other potential stakeholders.

It's about our people but we've got agencies in our State and we've got programs in our State and . . . I try to gel all of that together and make it doable for what we're trying to accomplish . . . I connect people. So it's people to people, people to agencies. You know, in our State we have an intermediate agency that supports all the schools and there's a lot going on there so I have to keep making that connection and then making the connection program to program. (NM)

Conveners learn to respect the role of boundaries, even when they seem to get in the way of quickly discovering mutual interest. It is not realistic to uproot people and enlist their participation in a completely new endeavor. In seeking new common ground conveners honor the existing accountability of stakeholders to their contexts, including regimes of competence, the agendas and expectations of organizations involved, and their own trajectory through the landscape. This respect for boundaries takes patience and persistence, but the commitment to common ground is likely to be more robust.

Creating engagement across established boundaries is also risky. Conveners need to move potential stakeholders beyond their current thinking or ways of doing things and persuade them that coming together across boundaries is worth their while. But it will only work if they convince enough of the right people to take the step.

To pursue this endeavor, conveners broker and hustle between potential stakeholders to encourage participation from people with different interests and different expectations. They enlist the support of networkers, brokers, weavers, and anyone who can contribute to the social fabric and translate across boundaries. They reframe and adapt their message to address different constituents.

### **Translating between personal and organizational perspectives**

Not only are conveners initiating tenuous conversations at the boundaries between traditionally unlikely partners, they are also balancing the outcomes with organizational, administrative, and funding demands. The more successful they are at crossing boundaries the more they need to renegotiate their own and others' accountability to structures in their organizational contexts for sponsorship and support.

Conveners are strategic networkers who build connections and rely on the sense of accountability that comes with those relationships. But persuading



people of the benefits of coming together across the landscape is not enough. Conveners also have to ensure that decision-makers in hierarchical positions appreciate what they are doing. While they set out to leverage the power of network connections they also stand accountable to organizational structures and political hierarchies. Moreover, they also have to take into consideration the accountability of people to the same types of structures in their respective organizations.

Compounding this challenge is that the people with the most potential in new configurations are often the busiest and most likely to have competing demands from their organization and other commitments. These other demands can easily take over from any enthusiasm for engaging in cross-boundary endeavors. To be successful, conveners need to help people translate their involvement in a new endeavor into something their organizations will understand, appreciate, and support.

You then have to persuade people that there are costs and benefits . . . that the inputs, outputs have a benefit to them and I think that's where you have to identify the people with different interests . . . You just have to keep everybody in the loop and keep everybody happy and balancing the care and attention that you give to the various players . . . (JH)

How do we keep teachers enthused . . . you know . . . they get in the middle of the school year and they kind of get bogged down and things get tense . . . (NM)

### **Leveraging and resisting power to include a diversity of voices**

In trying to reconfigure the landscape, even in small ways, conveners will inevitably meet the political nature of the landscape as described in Chapter 1. The ability to define what matters, what counts as success, what needs doing, what is permissible, and what is considered authoritative knowledge is unevenly distributed across the landscape. To reconfigure the landscape conveners need to leverage existing sources of power to achieve their goals.

At the same time, conveners have an acute awareness of the need to involve all the voices relevant to their endeavor, including, and perhaps especially, the traditionally silent ones. They see that all practices have their own perspectives, which cannot be subsumed under another. They know that the success of their endeavor depends on practitioners representing their own voices in the

You cannot assume that just because something was in place 3 months ago it is still in place now . . . When you get changes in one chain of command, you sometimes overlook that you really have to bring them on board from zero. And the people who were there at the earlier stages sharing the enthusiasm in the room next door – they're gone! And you cannot take for granted that the people after them automatically have the same insights. (JH)

As we grow, what of those pieces need to be reinforced, introduced to the new people who come on board? I don't think it is just as simple as to just say – hey come on board ... (NM)

I'm ... persuading internal stakeholders ... seeking endorsement ... identifying sponsors ... demonstrating to others that we have endorsement ... tweaking the interest ... facilitating agreement ... There's a balance to be struck between being optimistic and over promising and I think maybe a mistake I've made is assuming that my mandate from the Bank was a given and you manage up, you manage down, you manage sideways, you manage out, you manage in, you know. It's not always easy to keep all of the different bits in balance ... (JH)

conversation and expressing them in ways that influence the reconfiguration of the landscape.

Conveners have to engage with power without letting it get in the way. At times they need to enlist people or institutions with the power to make things happen. Sometimes they need to protect the endeavor from interferences by those same powers.

While conveners have to leverage various sources of power it is counter-productive for their endeavor if they merely reproduce traditional power structures in their efforts to leverage them. This entails a subtle dance between acknowledging the uneven distribution of power and giving voice to different and often unheard perspectives.

Dealing with power is an area where conveners have to be very strategic about keeping the landscape view. Indeed issues of power often reflect special interests with too narrow a view. Conveners are working on behalf of the whole landscape in spite of

all the pressures to listen to specific interests. They seem to have an instinct that power is something to both leverage and counteract, and that an important aspect of knowledgeability in the landscape is to recognize the full set of voices relevant to the issue at hand.

### Sustaining an endeavor over the long haul

Reconfiguring a landscape is long-term work. However, time scale is a challenge because the landscape both has inertia and is constantly shifting. While trying to reconfigure a landscape amidst fast-changing times conveners are also faced with long-established practices, enduring boundaries, complex institutions that reflect disjunctions between levels of scale, and powerful stakeholders with an interest in keeping the status quo. Another reason the endeavor of conveners takes time is that it depends on progress on two fronts simultaneously:

- *progress on the domain*, i.e., on the challenges that drive the endeavor and that participants care about;
- *progress on learning*, i.e., on people's understanding of learning in cross-boundary partnerships and thus on their adaptation to new ways of working.



**Sustaining coherence across shifting contexts.** While there is inertia in the landscape, there is also constant change. The building of alliances takes place amid shifting parameters. With tensions across multiple boundaries, the often-fragile sense of coherence conveners create among stakeholders with different interests is frequently challenged by unforeseen circumstances, organizational shifts, and misunderstandings about their intentions. They have to renegotiate old ground, for instance, when people move on and are replaced by others who replace them and need reinitiating. The art of systems convening is to sustain a consistent trajectory for a complex endeavor amidst all these changing and unpredictable circumstances.

**Enabling long-term reconfiguration through short-term results.** Going for the long haul and managing expectations are important. Sustaining fragile partnerships depends on short-term progress while making progress in cross-boundary partnerships requires time. Relationship building and creating a common language cannot be hurried as they are the foundation for learning together and collaborating. But while the work of reconfiguring the landscape is long term, people and institutions are impatient for results. Having brought people together across the landscape conveners then have to show that participating in the endeavor brings high value for the time they are investing. Conveners balance the long-term change necessary for their vision to come about with the short-term results that will keep people and organizations working with them.

I was trying to make sure that everybody perceives at every stage that the benefits to them exceed the costs to them . . . It wasn't as if I could deliver everything, results, outcomes and so on, in one financial year, within one staff evaluation period, so you know, the bank is a little impatient . . . they say 'Show me results.' (JH)

With so many moving parts and while the ground is constantly shifting, conveners struggle to sustain their endeavor long enough and with enough coherence to make a difference. They hope that people will make progress in the domain while also committing to a new type of learning partnership that may challenge the status quo. Most conveners harbor a nagging suspicion that they must be crazy to try. But they plow on.

A lot of it is just helping people see things in a different way. It's not that they were deliberately obstructive of change, but they may not have realized that change was a positive thing, so they just didn't make a positive effort to do it. (JH)

### **Convening work: reconfiguring identities**

We have argued in Chapter 1 that people configure their identities by modulating relationships of accountability within a landscape. Reconfiguring the

landscape entails identity work that will engender a sense of accountability to the new configuration. Reconfiguring identification is crucial because systems conveners rarely have formal authority over the people they need to involve in their endeavor.

Their efforts to reconfigure the landscape are very different from a top-down reorganization. The only way conveners can get people to join them is to allow them to make the endeavor their own – part of who they are and what they want to do. Conveners need to offer people new ways of seeing and experiencing themselves in the landscape. They have to go beyond simply inviting people into a project; they invite them to reconfigure their identity to become part of a reconfigured landscape.

To achieve this reconfiguration of identity, conveners work through the three ‘modes of identification’ introduced in Chapter 1 – imagination, engagement, and alignment.

### **The work of imagination: aspirational narratives**

Conveners spark people’s imagination and open up new aspirations for them.<sup>5</sup> What they propose is not just a vision. It is a new narrative about the landscape, its potential, and people’s identities in it. Such an aspirational narrative invites a configuration of stakeholders to undertake something that no one thought possible. By articulating their vision into an aspirational narrative, systems conveners are in essence stoking people’s imagination about the landscape and their role in it. The story they tell about the landscape reveals new potential latent in it.

This work of imagination, however, is difficult. Most conveners struggle to express their vision in ways that make sense to people. There are several reasons why this might be so:

- The vision they hold is often an incipient one, perhaps an intuition, an evolving hunch, rather than a well-formed vision of the final state.
- Whether a hunch or a well-formed vision, it may well be something that no one fully shares, especially in the beginning. Each participant or group holds only a small part of that vision.
- Conveners are well aware that to get traction their vision needs to be to a large extent co-created. Simply articulating it and waiting for people to live it does not work. Telling the narrative must be an invitation to a variety of stakeholders to share in its creation.

The challenge in sharing an aspirational narrative is to get people to identify with it, or at least a part of it, from their perspective. Conveners need to talk to a lot of people and rehearse their narrative with different audiences and in different settings. A growing part of our work in coaching and supporting systems

conveners is to help them refine and rehearse the telling and retelling of the aspirational narrative – or versions of it – so that different stakeholders can recognize themselves and their own aspirations in it.

### The work of engagement: boundaries as learning assets

Aspirational narratives can generate identification and inspire buy-in, but they are unlikely by themselves to bring about changes in practice. Conveners have to identify locations in the landscape where new forms of engagement across boundaries are likely to be productive. Then they need to facilitate meaningful encounters where people from relevant locations in the landscape can negotiate who they are to each other and what they can do together. This can be a challenge if people resist moving beyond familiar spaces that support traditional relationships and modes of engagement. Conveners need to entice them by designing boundary activities that stretch their understanding while also addressing key current concerns from their existing contexts.

Many systems conveners are practitioners in their field. Some are strategic thinkers. But they often do not have much experience designing for engagement and partnership. Yet it is key to making new partnerships work.

Too often we have seen conveners view their design task as if interactive activities can simply be inserted into a traditional agenda; or they leave the design of the agenda for an administrator to create. But careful design of activities that enable productive cross-boundary encounters is an integral part of reconfiguring partnerships in the landscape. The most successful learning activities tend to engage people in doing something concrete relevant to stakeholders' practice and calling for collective engagement in negotiating significant issues:

- Focusing on practical issues of close relevance makes it more likely that challenges and mistakes are treated as opportunities for shared reflection and learning.
- Addressing concrete challenges where progress matters to all stakeholders makes it less likely that boundary interactions will degenerate into ideological school-of-thought fights.
- If people can engage their own practice in a boundary activity rather than simply listen to or visit someone else's practice, then participating in that activity is more likely to become transformative of their own practice.

People's understanding of the information isn't self-evident, so you have to facilitate and help people see old situations in new ways or see things for the first time. (JH)

I have been around and I've gone everywhere in the State honking this and it's like wow! And everyone thinks it's good in theory but then it kind of, well nothing happens! (NM)

Enabling such activities involves a variety of design elements:

- *Facilitating boundary crossing*, for example, involving certain people in brokering information across different stakeholder groups; creating or improving boundary objects, such as documents, that speak to people in different sectors; organizing visits to the practice of potential partners; devising projects that require people from different backgrounds to negotiate a common aim.
- *Designing for different types of learning spaces*. Different learning spaces support different kinds of interaction, from the formal to the informal, from structured to emergent,<sup>6</sup> from introspective to observing the practices of others.<sup>7</sup>
- *Using multiple ways to connect people*. Leveraging the affordances of technology and imaginative use of physical space to support multiple ways of connecting people across geographies, time, and differences.

Facilitating engagement in boundary encounters requires conveners to manage the balance of accountability and expressibility introduced in Chapter 1. Sustaining mutual engagement across boundaries entails new forms of accountability. However, expressibility is also an important factor, as relationships of power and accountability can easily marginalize or silence non-conforming views. Conveners pay attention to the expressibility of:

- **Voices**, especially the voices of people or groups who have not traditionally been involved. Reconfiguring the landscape through new forms of engagement can give a voice to groups or individuals who have previously not been heard, surfacing overt and subtle issues of power.
- **Differences**, whether they be differences in perspectives, goals, languages, or approaches. Paradoxically, working to make differences expressible is often a way to discover true mutual interest.
- **Power**, so the existence and nature of relationships of power among stakeholders become discussable. Again paradoxically, acknowledging power relations and reflecting on their effects, positive or negative, can be the best way to mitigate their potential harm to learning.

The idea of using boundaries as learning assets is to combine multiple voices and perspectives to create more complex forms of identification reflecting the landscape more broadly. Such meaningful engagement across boundaries is transformative:

- **Transformative of practice**. The differences, tensions, and conflicts that surface in boundary encounters have significant innovation potential when channeled into making progress on practical issues that matter to stakeholders.

- **Transformative of identity.** Engaged negotiation with a diversity of perspectives anchors knowledgeability in personal experience. Such direct and active encounters with other practices are conducive to reflection because they offer a chance to see oneself through other eyes. These encounters have the potential to yield both better knowledge of other practices and better understanding of one's own practice in its relation to the landscape.

### The work of alignment: effectiveness at scale

Even successfully facilitated and personally inspiring boundary encounters will not sustain a broad and innovative endeavor aimed at transforming practice. Practice is embedded in complex systems operating at multiple levels of scale and changes in practice are rarely sustainable unless they involve realignment across the landscape.

To foster alignment, conveners propose aspirational narratives ambitious enough to transcend specific locations in the landscape. They challenge everyone rather than reflect the interests of specific stakeholders. Such alignment stretches the agendas of all stakeholders by including the perspective of a broader configuration, but it does not act as a replacement for these agendas. Participating in new configurations cannot detract people from pursuing their own agenda. This would be futile, unsustainable, and eventually counter-productive. People will not engage for long in an endeavor that takes them beyond their territory unless there is enough alignment with their own work.

The convener's push for alignment does not displace people's agendas; on the contrary it embraces these agendas to make them more ambitious, more connected, and in the end more likely to be effective.

This sounds grandiose, and it is; but in practice, it often takes the form of simply recognizing opportunities for enabling conversations, activities or projects that could achieve a valuable outcome for individuals while also contributing to the overall alignment of the endeavor and the weaving of new social relationships. These may be projects that people are already pursuing but that could achieve greater results when done in the context of cross-boundary collaboration in the landscape. Or they could be entirely new projects that serve and stretch the agendas of multiple stakeholders. Conveners often find themselves in a unique position to see such potential in disparate contexts. There is a method to it: recognizing the opportunity, connecting people around that opportunity, and providing just enough support to get the process going.

Having persuaded a number of stakeholders individually that this would be in their interest, I think you then have to identify what the impediments to getting into that improved state are and then you have to negotiate with a sufficient number of stakeholders for them to kind of make tradeoffs, compromises, put in a bit of effort they haven't done before, so that by contributing to this common exercise, they themselves are better off. (JH)



Effective conveners have a deep grasp of the overall endeavor and can see potential in smaller opportunities. They have a good sense of the landscape and know what matters. They understand enough about the perspectives of relevant stakeholders to create a relevant value proposition and are able to imagine the activities that would enable progress. This is how they work towards aligning people's participation with the overall vision.

Alignment is traditionally sought through top-down processes such as policies, program rollouts, and compliance audits. The alignment that conveners seek is of a different kind. It depends on reconfigured identities that embrace accountability in broader configurations. It is not based on compliance but on identification and knowledgeability:

- Identification with the endeavor and its multiple stakeholders.
- Knowledgeability about the points of articulation and disjunction in the landscape where alignment has to be sought and negotiated.

Conveners often have to spend time and resources convincing people in positions of power in organizations of the value of alignment through practice-based learning partnerships that focus on identification and knowledgeability. Indeed this type of mutual alignment takes time and effort. It appears more chaotic and less guaranteed than compliance with conventional top-down implementation. In the long run, however, it has the potential for more robust and sustained realization in practice.

### **Identification with the landscape**

The work of imagination, engagement, and alignment produces a social learning process for reconfiguring identification – identification with a broader, more ambitious endeavor with other players in the landscape, and with effectiveness to be achieved across practices and at multiple levels of scale at once. The modes of identification are mutually reinforcing and all three are essential to the convener's endeavor:

- Not enough imagination – people do not see what is possible, where they are located in the broader picture, nor why they should take a risk with new configurations.
- Not enough engagement – the endeavor remains a dream or pro forma, other stakeholders remain distant abstractions, and the status quo is unlikely to be challenged.
- Not enough alignment – the endeavor does not achieve change at a scale sufficient to make a real difference in practice.

Indeed, conveners seek to increase the knowledgeability of people in the landscape with the idea that this has got to lead to new synergies and capabilities.



Often couched in terms like 'sharing knowledge,' it is really a process of becoming more knowledgeable about other people's practices which may have some bearing on one's own. This opens up new avenues for making progress in the field. Conveners have an aspirational narrative that may represent their vision, but they do not have a fixed agenda which they attempt to roll out. By exposing people to new views and experiences of the landscape, by opening up their imagination to what's possible, and by forging new relationships, they attempt to produce new forms of knowledgeability and let this new knowledgeability shape what people do. They make people more knowledgeable about the landscape so their reconfigured identities lead to new behaviors. Over time the convenue's endeavor increasingly makes sense to people who are able to appropriate this vision for themselves. The resulting increase in knowledgeability provides a foundation for new forms of participation oriented to the landscape.

### Being a convenue: the reconfiguring spirit

The work of systems convening is not for the faint of heart; but it is not for the reckless or the high-handed either. It calls for an unusual mix of boldness and humility, calculation and risk. Indeed, it is the strength and the frailty of the work of conveners that they are themselves part of the landscape. They do not occupy a privileged position outside of it; they toil within it. They are not puppeteers; they are travelers. Their work as convenue is part of their own learning journey through the very landscape they are trying to reconfigure. In this journey, the reconfiguring of their own identity inspires and informs their attempt to reconfigure the landscape.

Systems convening is intensely personal work. It is therefore fitting to end this chapter with some observations about the person of the convenue. While conveners come in all shapes and sizes, operate at different levels of scale, and have different relationships to the landscape, we have noted some interesting patterns. Reflecting the tensions inherent in their work, the life of conveners is an exercise in paradoxes. It takes someone with an unusual mix of characteristics and poise to tread these paradoxes.

### On a personal mission

Conveners are driven by a very personal sense of mission. They feel a commitment to long-term, sustainable results that go beyond narrow individual aspirations.

This personal sense of mission is essential. It is what makes them convincing and allows them to use their own journey as a source of inspiration for creating aspirational narratives. It is also what sustains

This is a really corny thing: I want to make a difference. So I as an individual accountant just doing my individual job wouldn't change the world for the better, but if I want to help contribute to positive change, I need to leverage the involvement of others . . . (JH)

them through uncertainty, lack of recognition, outright opposition, and even doubt about themselves.

... certainly I doubt my own skills but I don't doubt this vision. (NM)

Successful conveners are driven by a personal mission, but they are able to invite others into this mission in such a way that the ownership of the mission is shared. They do not let their overriding sense of mission translate into an urge to control.

They let others construct the narrative with them. While they open spaces for learning and instigate change they also invite others to shape the agenda and develop solutions.

There's some ownership there, it's not top-down which I think has been really important, and they see the benefit of participating. That here they have access to this wealth of information and they can also be included ... so that they're a player in this and contributing ... (NM)

We're really trying to change the way we do business and education in Iowa and we have a plan, but everyone is doing it independently and that's like - we will never get it done in our State if we take that approach. (NM)

They can find it difficult to assess their contribution, guide them, or rein them in. Their desire to engage others can make them susceptible to prolonged confidence or reliance in the wrong person.

Promoting others' leadership also requires a delicate balance. Strategically working behind the scenes, where the more effective they are the less visible they will be, conveners also need to demonstrate the work that they do. There is a tension in giving credit for results to those who join and take leadership in the endeavor as they risk prematurely losing the resources for their own work.

### Passionate and strategic

It is difficult to describe what 'goes on behind' what people see without feeling as though 'you are taking credit' by telling how hard *you* worked. Conveners must express these tasks and overcome feeling boastful or 'martyr like.' (Joanne Cashman, see Chapter 9)

Driven by their passion, conveners are idealistic and given to impatience. There is a pioneering spirit in most conveners we meet.<sup>8</sup>

They are social innovators paving the way for solving complex problems, driven by a certainty that much can be achieved if they can just bring the right combination of people to the table.

They are spearheading a vision that transcends traditional boundaries, organizational divisions, and institutional narrow-mindedness. They are ambitious and bold and tend not to let concerns about details get in the way.

Certainly if there was support and funding and everybody was saying, yes let's do this, but truly, it's about being bold. Let's go after it, we have to! It's just time . . . (NM)

And yet they have to combine this passion and enthusiasm for what they believe is possible with the pragmatism necessary to make it happen. They manage a tension between the personal passion and charisma it takes to convince people to become involved on the one hand, and careful calculations on the other hand – to seed the right ideas, create useful connections, initiate appropriate activities and projects, and justify to organizational sponsors the resources it takes to make progress. They are dreamers but they are also schemers, with a solid dose of strategic thinking and tactical acuity.

### **Mavericks at the edge in their own organization**

Conveners themselves are usually affiliated with an institution in the landscape; but the complex, dynamic, and personal work of systems convening is inherently at odds with the more rigid structures of the organizations whose support and sponsorship conveners have to seek. As a result, conveners tend to play at the edge of what is permissible in their (and others') organizations.

As organizational mavericks stretching the bounds of what is possible conveners are easily misunderstood, unrecognized, or undervalued. Skeptics are often waiting in the wings for small failures.

Conveners can burn out or get moved on by their organizations before they can see through their long-term vision. And while they channel their convening energy through an organization they believe in, they are often dismayed by the organizational procedures they will have to go through to make things happen: hierarchies to be accountable to, policies to comply with, procedures to follow, and support that depends on producing specific types of data to demonstrate the value of what is happening. Conveners take risks as they pursue their vision while navigating these expectations. These risks leave them vulnerable to political winds or changes in leadership. A lot of convening work is not easily visible to hierarchies. Focusing on long-term effects finds little resonance. The job of conveners is easily threatened by changing economic circumstances and organizational restructuring. Often they cannot be certain that their job is secure enough to see the project through or to plan beyond the next step. Conveners may be pragmatic, aware of different interests in the landscape, and politically astute; but their endeavor is such that these

Had I known that this position or this initiative were going to go forward, I would have been doing things in December to get ready for all of these next steps. Instead I've had to go around . . . in limbo – and then just had to say: wait, we don't know . . . (NM)

One of the dimensions I've neglected is my safety net. I think that's very important, very significant. (JH)

qualities in the service of their vision do not always save them from rather precarious positions in their own organization.

Mavericks in their organizations, conveners can feel like lone rangers. Often the only person who fully grasps the potential that exists across boundaries conveners can tread a rather lonely path. Behind the cheerful face and sanguine disposition is someone who craves companionship and understanding. Yet so accustomed are they to being robust loners in the landscape that they rarely seek out other conveners in neighboring landscapes to ask for help or advice. A supportive network is important, however, as the kinds of challenges conveners face call for attention to personal support and self-care.

### **Legitimacy and knowledgeability: at home, everywhere, and nowhere**

As an invitation, convening requires legitimacy, but legitimacy is problematic across boundaries.

... you need a certain technical and related standing to be credible; I mean people have to allow you into the room. (JH)

Whatever source of legitimacy gives them an entry point into the landscape – reputation, technical competence, organizational support, access to funding – they work hard not to be perceived as colonizers. They strive to make participation

in a landscape-oriented endeavor a contribution to local practice rather than a distracting additional task. Their legitimacy is deep enough to engender respect and yet broad enough to transcend boundaries and invite widespread engagement.

Systems conveners are both at home and misfits in most locations of the landscape, with no obvious location for their identity. They may not be competent in any one thing, but have enough of a history in the landscape to have a cross-boundary perspective. They are knowledgeable about the shape of the landscape and the ways various practices articulate.

They appreciate different forms of competence enough to leverage them. This gives them a fine-tuned sensibility to good ideas. It allows them to opportunistically pick up potentially relevant suggestions from different parts of the landscape and weave them into an overall strategy. Being knowledgeable

Having this vantage point of having been in this system a while and been in several different roles and then being able to kind of look at it from a bird's eye view has just been really very, very valuable for me. (NM)

rather than competent can make them vulnerable to inappropriate suggestions. Their sensitivity to new ideas and hunger for cross-boundary innovations can push them to leap on proposals based on superficial understanding, immune to corrections that represent a local understanding.

And yet it is precisely this ability to grasp the possible beyond local certainties that makes them such an important contributor.

### Upbeat and persistent

Given the long-term nature of their commitment and the likelihood of temporary setbacks, perhaps the key characteristic of successful conveners is persistence.

Something keeps them going in spite of many obstacles. Conveners meet with plenty of resistance and go through times when giving up seems like the more reasonable option. Even though they come to embody the endeavor and invest their personal social capital in it, they take on the resistance rather stoically.

Yet they embrace unexpected obstacles and resistance with a sort of dogged positivism that drives the process. They remain upbeat as they keep the project alive and moving even when things are not going well.

They tend to be optimistic, even over-optimistic, and their positive spin often fuels the endeavor, especially in the early stages. Their optimism extends to people as well as goals and setbacks: conveners tend to be generous in their attribution of intentions, their respect, and their compliments, especially to key players on whom the project depends.

However necessary for spearheading a difficult initiative, being upbeat and persistent exacts a price. It can lead conveners to underestimate how long it takes to transform practices and identities, address boundary differences, or change organizational cultures. Spending a lot of time and effort fighting the reality of the landscape in the name of a legitimate cause can make the reality more difficult to see. And the need to be upbeat all the time can make it seem as though being critical or self-critical is a betrayal. While essential to overcoming obstacles and inspiring others to keep going, dogged positivism exists in tension with the need for critical reflection and realistic assessment.

You just kind of take it on the chin . . . with a confidence in the long-term rightness of what you're doing and just weather the storm . . . (JH)

Where I get a bloody nose is getting those . . . sponsors to see what we're doing and to see the value that it's adding to our State. (NM)

If you want to get people engaged and enthused and so on, you have to be optimistic, you have to believe that positive things can happen. You know, is the glass half full, is it half empty? (JH)

I'm the chief enthusiast so if I can pick myself up today and get up there and give the great cheer, I think that's been very helpful for people. (NM)

I suppose one can sometimes get a little bit over enthused about the constant push forward without always looking back to make sure that everything is in place. (JH)



### **A discipline of systems convening: leadership for the twenty-first century**

Systems conveners fulfill a critical function in landscapes of practice. If we have made it sound like an impossible job, it's because it is. Working with a number of people who have taken it on, we have developed a kind of puzzled reverence for conveners, whether they succeed or fail. Taking on an impossible job may well be the only way to push the boundaries of what is possible in a complex landscape of practice.

Describing the challenges, work, and characteristics of systems conveners is a step toward recognizing their role and providing an environment conducive to their success. Conveners themselves need to see that their situation is not unique; many others face the same struggles. The people they convene need to appreciate the work of those who prod them to move beyond their comfort zones. And organizations need to understand what conveners do and the value they bring so they can provide needed support – or at least avoid creating obstacles.

We see systems conveners as pioneers of a new type of leadership. They fulfill a critical need in the twenty-first century. Issues that brought people together in the past tended to be local and geographically based. They were mostly structured along organizational, disciplinary, or sectoral interests. Today, complex problems require cross-disciplinary thinking, local problems call for regional or global responses, and societal issues require cross-sector partnerships. At the same time markets, business processes, government services, and education are moving towards more networked approaches. Web and mobile technologies are transforming the possibilities for connecting and supporting new types of peer-to-peer interactions. These trends require us to be more reflexive about leadership in complex landscapes; they call for processes and approaches that are still being invented. Our work with some pioneers of this art has started our inquiry into an emerging discipline of systems convening.

The discipline is in its infancy. We need stories of systems conveners at different levels of scale, not just high-level conveners with enough organizational visibility to be easily recognized. There seem to be different types of systems conveners – from those who sponsor the endeavor, to those who drive it, to those who implement it. On a practical level are questions about tools and practices. What tools would help them create visual maps of the landscape to articulate its potential to different stakeholders? What questions and activities are likely to engage people across boundaries? What understanding of learning would help them articulate the new configuration of partnerships in a compelling way? What approaches would enable them to capture and scale up learning in a landscape? On a strategic level, we need to better understand the power structures that support the work of conveners, or get in their way. We also need methods for assessing and articulating their impact on the landscape. Pursuing these and many other questions will be necessary to build the discipline of systems convening so it can contribute to some of the leadership challenges we face today.



## Notes

1. Craig and Patricia Neal (2011) write about the 'art of convening' where they are concerned with how a facilitator gathers and holds people in a close and generative space that leads to effective or authentic engagement between individuals. The conceiver is someone who is concerned with minute-by-minute and day-by-day moments of genuine and transformative conversations that lead to positive outcomes. Kate Pugh (2011), a knowledge management consultant and author of *Knowledge Jam*, talks of conveners as 'Collaboration Glue.' The Collaborative Leaders Network of Hawaii identifies conveners as a vital part of their strategy for bringing diverse groups of people together to solve the state's problems. For this network a conceiver is 'an individual or group responsible for bringing people together to address an issue, problem, or opportunity . . . usually . . . from multiple sectors for a multi-meeting process, typically on complex issues . . . Conveners use their influence and authority to collaborate' (The Collaborative Leaders Network, n.d.).
2. Melinda Gates of the Gates Foundation describes the Foundation as a conceiver of people and projects (*The Economist*, 2006). The former senior partner of strategy and innovation at the World Bank refers to the bank as 'Conceiver first, lender second' (Whittle, 2011). The Clinton Global Initiative proposes to use 'conceiving power' as a way to achieve their mission: to inspire, connect, and empower a community of global leaders to forge solutions to the world's most pressing challenges (<http://www.clintonglobalinitiative.org/aboutus/>).
3. In a *Time Magazine* article (2011), Hillary Clinton talks about this as smart power, which is the forming of coalitions and the use of new media to foster development aid and public-private collaboration (p. 18). She used her smart power as U.S. Secretary of State to broker conversations between different government heads, non-governmental organizations, women's groups and other interest groups. Her style of brokering coalitions and paying attention to the affordances and transparency of new technology marks a shift in traditional methods of diplomacy that used military or economic power to leverage control.
4. In this chapter, when we use the term conceiver for simplification, we are referring to 'systems conceiver.'
5. This idea is related in part to the idea of 'legitimizing accounts' proposed by Creed et al. (2002) to describe how social activists interpret and adapt ideas to local logics and settings to provide common meanings and identities that mobilize local participation.
6. Roy Williams, Jenny Mackness, and Simone Guntau (2012) have developed a tool called 'footprints of emergence' for reflecting on a learning environment on a scale between prescribed and emergent.
7. In her dissertation, Sue Smith has identified four different types of learning spaces in her work as a conceiver: the peer-to-peer space for mutual learning, the social space for building relationship, the reflective space, and the peripheral space through which learning extends to other contexts (Smith, 2011).
8. This is related to the concept of 'institutional entrepreneurs' Institution Theory. Fligstein (2001), for example, proposes that these entrepreneurs are skilled strategic actors who find ways to get disparate groups to cooperate by providing common meanings and identities. The vision of a systems conceiver is to change the learning and problem-solving capability of a system over the long term by opening new spaces and making new connections. Their transformation of a system is usually beyond any institutional context.

## References

- Creed, W. E. D., Scully, M. A., & Austin, J. R. (2002). Clothes make the person? The tailoring of legitimating accounts and the social construction of identity. *Organization Science*, 13(5): 475–496.
- The Collaborative Leaders Network (n.d.). <http://collaborativeleadersnetwork.org>. Accessed December 8, 2013.
- The Economist* (2006). The new powers in giving. <http://www.economist.com/node/7112702>. Accessed December 8, 2013.
- Fligstein, N. (2001). Social skill and the theory of fields. *Sociological Theory*, 19(2): 105–125.
- Neal, C. and Neal, P. 2011. *The Art of Convening: Authentic Engagement in Meetings, Gatherings, and Conversations*. San Francisco, CA: Berrett-Kohler Publishers.
- Pugh, K. 2011. *Sharing Hidden Know-How: How Managers Solve Thorny Problems With the Knowledge Jam*. New York: John Wiley & Sons, Incorporated.
- Smith, S. (2011). *SME leaders' learning in networked learning: An Actor-network theory and Communities of Practice theory informed analysis*. Unpublished dissertation, University of Lancaster, UK.
- Time Magazine* (2011). Hillary Clinton & the rise of smart power. November 7, 2011, vol. 178 no. 18.
- Whittle, D. (2011). The World Bank as convener first, lender second? In *The Huffington Post*, July 27, 2011. [http://www.huffingtonpost.com/dennis-whittle/the-world-bank-as-convene\\_b\\_910382.html](http://www.huffingtonpost.com/dennis-whittle/the-world-bank-as-convene_b_910382.html)? Accessed December 8, 2013.
- Williams, R., Mackness, J., & Gumtau, S. (2012). Footprints of emergence. *International Review of Research in Open and Distance Learning*, 13, 4. <http://www.irrodl.org/index.php/irrodl/article/view/1267>. Accessed December 8, 2013.