

# Can We Lead Virtually? Yes, We Can!

In 2014, more than 50 national organizations, organized by the OSEP Partnership Project, published a blueprint to convey the lessons learned during 15 years of coming together to discuss shared work. They titled the blueprint, *Leading by Convening* (LbC) to communicate the power they discovered in bringing diverse perspectives together to inform and support common interests. More than 250 contributors from state and local levels shared what they had learned about the power of engagement. State agencies, local agencies, and organizations have embraced LbC because it describes leadership from their perspective and from potential partners. It offers stakeholder-developed tools that show the user how to engage. The messages in this brief are based on the principles of engagement expressed in LbC.

*“What if I cannot bring people together in person? Can I convene people virtually?”*

As convening becomes recognized as a new leadership competency, one question occurs again and again, *“What if I cannot bring people together in person? Can I convene people virtually?”* The answer is a resounding, *“Yes!”*

### ***What Does It Mean to Lead by Convening?***

LbC is a guiding framework for leaders at all levels; it focuses on the human side of change. In LbC, convening is both a role and a skill set. Conveners are not always the leaders. Rather, conveners create the context for participants to act together and for new leaders to emerge. Conveners focus on value through the lens of participation. They ask the following questions:

- What issues will bring people together?
- Who should be involved to ensure progress in practice?
- What should we be doing together that will improve the individual and collective ability to act?
- Who has skill and credibility to lead on this issue?

Convening is more than an event. It is more than facilitation. It is the beginning of a relationship that is focused on practice change. Conveners understand that the “pull” of the issue can build affiliation among individuals from a variety of roles and locations. It is this understanding that allows them to think about virtual convening and develop ways to do online what many do in person. When virtual conveners add a phone link, web camera, and active chat, they build the personal connection that is important in building affiliation online.

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## How Do We Develop New Habits of Interaction?

To bring people together on an issue, conveners must have a solid grasp of the issue under study. At the same time, they must be open to differing perspectives. Conveners create the space for these ideas to emerge and be articulated, explored, challenged, and /or validated by the group.

Although many people are accustomed to exploring topics in face-to-face meetings, developing key habits of interaction will help aspiring conveners to build participation in a virtual environment. By focusing on three habits of interaction: coalescing around the issue, ensuring relevant participation, and doing the work together, virtual conveners learn from and with the participants they bring together.

Virtual conveners learn how to lead by focusing on three key habits of interaction: coalescing around issues, ensuring relevant participation, and doing the work together.

### ***Coalescing Around Issues***

Conveners learn quickly that presenting an issue is not the same as coalescing people around an issue. Successful online conveners work with participants to do the following:

- Develop an aspirational statement that explains how work is expected to contribute to knowledge and practice.
  - *[Defining Our Core](#) is a useful tool in the [Leading by Convening](#) blueprint that was developed by stakeholders to describe what brings them together.*
- Express expectations about participation and develop simple ground rules for interaction.
- Outline the current knowledge base, including stakeholder-recommended resources that represent unique perspectives.
- Acknowledge prior and related work and invite key figures or groups into the new work.
- Create a rhythm of interaction, making it regular, inviting, and active.
- Use the live chat and polling features to probe the level of understanding and/or agreement during web meetings.
- Make sure members have active roles and lead parts of the work.
- Encourage participants who may be hesitant to participate, working with them ahead of a planned interaction.
- Help the group members to reflect on how well they are coming together to learn, share, and act.
  - *Use the coalescing rubric in [Leading by Convening](#) (p. 19) to gauge progress.*

## ***Ensuring Relevant Participation***

As conveners build interest in working together on an issue, they soon recognize that participation is more than joining a web meeting. To enable participants to share what they know, conveners do the following:

- Purposefully invite a range of stakeholders.
- Monitor participation often to be sure that all stakeholders are truly included.
- Intervene when participation does not meaningfully include groups that care about the issue.
- Engage frequently enough so that participants build affiliation with each other and the group.
- Create opportunities for individuals from a variety of roles to lead.
- Pay attention to power differences. Intervene gently when only prominent members lead. Ask them to partner with practitioners and family members.
- Acknowledge disagreement as part of moving forward. Find the points of agreement and work there until trust deepens and it is safer to move to areas for which there is a lack of agreement.
- Remember that the convener is not always the leader. Conveners know when to lead and when to cede leadership to others in the group.
- Regularly ask the group to reflect on the membership. Are the participants diverse in perspectives and roles? Does the group need to reach out to under-represented groups?
  - *Use the engagement rubric in [Leading by Convening](#) (p. 27) to gauge your progress.*

## ***Doing the Work Together***

The realized value of a virtual community is that members work together. The work might include initiating a dialogue on a new idea, sharing between members, coming to agreement on a definition, curating a collection of resources, or taking on a project.

To support more collaborative working relationships, conveners do the following:

- Articulate the value gained by working across groups often.
- Make sure to acknowledge contributions and perspectives. Conveners model it in their behavior and cultivate the habit in the participants.
- Learn to recognize members who can lead with credibility on an issue and invite them to take lead roles.
- Help members leverage connections. Ask them to take the work into their own networks and bring perspectives from their networks.
- Support the personal investment people bring to the work. Acknowledge the human need for recognition.
- Build credibility for the network by showcasing the work and the range of contributors in high-profile meetings, webinars, etc.

- Invest in an infrastructure that can support doing work together. Secure a web conference connection, an online repository, and a collaborative space.
- *If you do not have sponsored support for your communication and collaboration, search for free options.*
- *Use the engagement rubric in [Leading by Convening](#) (p. 34) to gauge your progress.*

An LbC approach in the virtual environment is characterized by the same guiding principles as in a live environment:

- Meet people where they are on the issue.
- Bring people together to discover why the issue is important and what might bring value to their work.
- Create ways that many people can participate.
- Build new knowledge together.
- Help people build their identity as collaborators.

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