

CONVENING A CASE - INPUT

INTRODUCTION

One of the realities of life in organizations, whether we are in formal or informal positions of leadership, is that things do not always go as we plan. Often, with the very best intentions, we make missteps, act out of blind-spots, or inadvertently inflame already conflictual situations. Conventional wisdom would often dictate that we should simply apply ourselves more vigorously, using more muscle, so to speak, without wavering in our conviction that this way we have chosen is the right one. Yet, people are not like rusted bolts, which respond by loosening up when more pressure is applied. In fact, it is a fairly common reality that the more force used to push people where we want them to go, the more they resist, even if they have some intuition that change would be in their best interest. Does this ring true in your experience?

A popular saying goes along these lines, “it is a peculiar form of insanity to do the same thing time and time again, and expect a different result.” However, as people who try to live, learn, and lead as *contemplatives in action*, we have alternatives open to us. We have customs and practices that include critical self-reflection, dialogue, discernment and adaptation... ways of illuminating our blind-spots and helping us examine the potentially erroneous assumptions that guide our behaviors, strategies, and plans.

One of these practices used by the early fathers of the Society was that of a communal discernment that involved the consideration of a critical issue, for instance, about who they might elect to lead them, or the way in which poverty would be observed. We know from the documents of the early Society that conditions were created so that the participants could make these decisions without pressure or anxiety, that they made provisions to take time to pray, dialogue, and deliberate about matters of weight and consequence.

Accordingly, in organizations, one of the most important ways that grace and nature seem to work together is when people come together with multiple and diverse perspectives to explore new and innovative ways of handling issues and problems, transcending their own agendas and interests to discover common purposes and aspirations. This convening of multiple perspectives is especially important, though challenging, for leaders in formal positions of authority. Even the most skilled leader is limited by his or her single perspective, and as a result, may operate from blind spots that are quite clear to others. The challenge for leaders is then to be humble enough to ask for help, and to be vulnerable enough to share their limits, and to make their mistakes public for the learning and growth of themselves and others.

WHAT IS CONVENING?

One practice that skilled and effective leaders undertake to support their learning and the learning of their colleagues and subordinates is to bring in a group of people with diverse background to explore a challenging case where things did not go as planned. As the group explores the case with the convener, they might provide alternative viewpoints, raise critical and evocative questions, and generate creative responses that emerge from the collective wisdom and experience of the group.

A convening case study consists of a three main components:

- A brief **introduction** that provides essential background details on the context of the case, the key players, the critical incident itself, and the convener's role/responsibility.
- A brief **account of how things unfolded**, including verbatim dialogue (if possible) that illustrates the issues in the critical incident.
- A **conclusion** that includes areas that the convener wants the group to attend to in the service of helping that person become a more effective leader. The key is for the convener to be vulnerable enough to share failures and mistakes rather than successes... never easy, but often, very valuable for learning and maturing. (In terms of format, this case should be no more than eight pages, double spaced.)

The (45-60 minute) process of a convening involves the following components:

- a facilitator who keeps track of the process
- a timekeeper who keeps track of the time boundaries
- the convener who presents their case, listens to the inquiry by peers, redirects if necessary, and share their insights at the end
- the peer participants who study the case, form perspectives, use the Four Parts of Speech to frame, advocate, illustrate, and inquire regarding what they'd like to share with the convener

On the following page you will find a template that guides you through the steps in convening a case. This template should serve as a recommendation but you can adapt it to your needs. Practice will tell you where more time needs to be allocated and what parts flow well.

EXPECTED LEARNINGS AND OUTCOMES

1. To access the wisdom and experience of peers and to help each other respond to an important and immediate leadership challenge in a fruitful and innovative way.
2. To generate concrete and creative ideas for how to respond to a pressing challenge.
3. To develop high level of trust and positive energy among the group.

"The unexamined life is not worth living"

Socrates

The above was drawn from Otto Scharmer's "Case Clinic", Ulab-Theory U. Check resources section for more details.

STEP	TIME	ACTIVITY
1	2 to 5 min	Select speaker and timekeeper.
2	10 to 15 min	<p>Statement/ story given by the speaker.</p> <p>a) Take a moment to reflect on your aspiration and on your sense of the situation. b) Current situation- key challenge or question you are facing c) Stakeholders - how might others view this? d) Intention - what future are you trying to create? e) Learning threshold - what do you need to let go of? What do you need to learn? f) Where do you need input, support or help?</p> <p>Listeners listen deeply and discerningly, and may ask clarifying questions (NO ADVICE HERE!)</p>
3	5 min.	<p>Silence.</p> <p>Listen to your soul/ heart/ gut/ intuition. Tune these in to God in what you are hearing. Notice what resonates. What images, metaphors, feelings and gestures come up for you, that capture or connect to the essence of what you heard?</p>
4	10min	<p>Mirroring: open mind (images), open heart (feelings), open will (gestures). Each listener shares what came up for them, either while listening to the speaker, or in the silence after listening.</p> <p>The speaker simply listens.</p> <p>When all have spoken, the speaker reflects back on what they heard</p>
5	20min	<p>Generative dialogue.</p> <p>All reflect on the remarks of the speaker and move into a dialogue on how these remarks can offer new perspectives on the challenge or situation.</p> <p>Go with the flow of the dialogue, being attentive to resonance and to the Holy Spirit. Listen deeply to every comment and question so that the group can build upon each other's ideas. Stay in service of the speaker WITHOUT pressure to fix or solve.</p>
6	8min	<p>Closing remarks.</p> <p>By the speaker- how do I now see my situation and way forward? What am I noticing about God's presence, attention or desire in it?</p>
7	2min	<p>Thanks and acknowledgement: an expression of genuine appreciation for all that has been shared, and for the group's openness to God and each other</p>

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