

Part I

Theory

Chapter 1

Learning in a landscape of practice: a framework

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One day we were sitting in the office of a friend who is lawyer. Pointing to a collection of volumes on her bookshelf she informed us that this was the “body of knowledge” of her profession. It was an impressive series of thick books. Later on we both agreed we were glad not to be lawyers, not to be held accountable to all that knowledge. While we understood what she meant, we agreed that this expression “body of knowledge” was a convenient but possibly misleading shorthand. For social learning theorists like us the “body” of knowledge of a profession is not just contained in a set of books. As important as the books undoubtedly are, they are only part of the story. They are too dead to constitute the full body of a living practice. From a social perspective we see the real “body of knowledge” as a community of people who contribute to the continued vitality, application, and evolution of the practice.¹

For professional occupations, however, the social body of knowledge is not a single community of practice. In this chapter we argue that the “body of knowledge” of a profession is best understood as a “landscape of practice” consisting of a complex system of communities of practice and the boundaries between them. Developing the metaphor of a landscape of practice, first introduced in ‘Communities of Practice: Learning, Meaning and Identity’ (Wenger, 1998), provides a broad social perspective on professional learning, and learning more generally. To account for the complex relations that people build across the landscape, we introduce the concept of knowledgeability. Whereas we use competence to describe the dimension of knowing negotiated and defined within a single community of practice, knowledgeability manifests in a person’s relations to a multiplicity of practices across the landscape. In these relations identification may involve little or no accountability to actual competence. Yet these practices may be just as significant in constituting of an identity of knowledgeability if identification is understood as something that is modulated across the whole landscape.

¹ The emerging area of practice-based theorizing on knowledge and learning in organizations has produced a rich literature in the last two decades. Authors have focused on various aspects of practice, for example, the life of documents in practice (Brown and Duguid, 1996), the relation between canonical knowledge and knowing in practice (Cook and Brown, 1999), managing knowledge across boundaries (Carlile, 2002), knowing through the senses (Strati, 2007), the embeddedness of technology in practice (Orlikovski, 2007), and the nexus between practice, learning, and change (Hager, Lee, and Reich, 2012). Gherardi (2006) has focused on knowledge across a multiplicity of practices in organizations and provides a useful summary of the field of practice-based studies (2009). The focus on practice extends beyond organizational studies, as argued by Shatzki, Korr-Cetina, and Savigny in their book “The Practice Turn in Contemporary Theory.”

Knowing in practice: regimes of competence

Being practicing members in good standing of a respected community of practice is a key reason why practitioners of any occupation deserve our patronage. If your doctor informed you that he had seen many patients in the last twenty years, but had not talked to any colleague, read any new article, or participated in any conference, you may question whether he was really qualified to deal with your health. Conversely, if he told you that he had read endless articles, but not treated any patients, you would have the same question about his legitimacy. You trust practitioners like your doctor to help you both for their experience and personal characteristics, and also because their actions reflect a competence defined by their community. Connection, engagement, status, and legitimacy in that community are all part of what makes someone a trustworthy practitioner.

One could in fact define a responsible practitioner as someone whose experience in providing a service reflects the current competence of a community. In this sense, the community's social negotiation of what constitutes competence results in a regime of competence: membership in good standing entails accountability to that competence. The importance of accountability to such a regime can be appreciated in the example of a malpractice lawsuit against a doctor. The fact that a patient died, however regrettable, is not in itself an indictment of the doctor; it is a piece of data. To adjudicate the case, a judge has to bring other members of this doctor's community to testify whether their accused colleague has been competent in applying the most current practice of the community. It is this mix of personal experience and accountability to the regime of competence of a respected community that assures professional standing and constitutes someone's identity as a practitioner.

In the sense used here, competence includes a social dimension. Even as manifested by individuals competence is not merely an individual characteristic. It is something that is recognizable as competence by members of a community of practice.

A regime of competence is not static, however. It shapes personal experience but can also be shaped by it. It is both stable and shifting as it lives in the dynamic between individuals' experience of it and the community's definition of it. Indeed, competence and experience are not a mere mirror-image of each other. They are in dynamic interplay. Members of a community have their own experience of practice, which may reflect, ignore, or challenge the community's current regime of competence. Learning in a community of practice is a claim to competence: it entails a process of alignment and realignment between competence and personal experience, which can go both ways. When newcomers are entering a community, it is mostly the regime of competence that is pulling and transforming their experience--until their experience reflects the competence of the community. This is what happens in apprenticeship, for instance. Conversely, experience can also pull, challenge, and transform the community's regime of competence. A member can find a new solution to a problem and attempt to convince the community it is better than existing practice. The experience of the physician whose patient died may challenge the community into reconsidering its practice. Any new experience that does not quite fit the regime of competence may cause the community to inspect and renegotiate its definition of competence. Or not. A challenge or a claim to competence may be refused by the community: a newcomer may be marginalized; a dissertation turned down; a new idea dismissed. Acceptance or resistance may be

well-founded, groundless, or even politically motivated. However derived, it remains potentially contestable. The power to define competence is at stake. Learning as a social process always involves these issues of power.

This dynamic interplay of experience and competence is why active engagement in a community of practice is so important for someone to become and remain current as a practitioner in a domain. For those who receive their services reliable, up-to-date practitioners embody the evolving regime of competence of their community.

A body of knowledge as a landscape of practice

The notion of a single community of practice misses the complexity of most “bodies of knowledge.” Professional occupations, and even most non-professional endeavors, are constituted by a complex landscape of different communities of practice—involved not only in practicing the occupation, but also in research, teaching, management, regulation, associations, and many other relevant dimensions.² All these practices have their own histories, domains, and regimes of competence.³ The composition of such a landscape is dynamic as communities arise and disappear, evolve, merge, split, compete with or complement each other, ignore or engage the other. Landscapes of practice are coming into focus as globalization, travel, and new technologies expand our horizons and open up potential connections to various locations in the landscape.

To understand how a landscape of practice constitutes a complex “social body of knowledge,” it is useful to consider some key characteristics.

The landscape is political: the power dynamics of practice

Various practices have differential abilities to influence the landscape through the legitimacy of their discourse, the legal enforcement of their views, or their control over resources. Regulators produce national policies and verify compliance with auditing practices. Theorists devise “discourses of truth” (Foucault, 1970) and abstract models that attempt to shape how people talk about practice. Researchers seek evidence for what works in the hope that their findings will direct practice. Teachers impart the right curriculum and grant degrees to those who seem to get it. Managers design work systems, distribute budgets, give orders, and set local policies. All these practices represent attempts to colonize the field of practice in various ways. And practitioners sometimes comply with mandates and demands, and something shrug it all off as too disconnected to be relevant. Sometimes they even create an appearance of compliance while doing their own thing.

² This is related to Silvia Gherardi’s notion of the “texture” of organizational knowledge and the conception of organization as a texture of interrelated practices in her book on “Organizational Knowledge: The Texture of Workplace Learning.” The notion of landscape, however, emphasizes the perspective of a contested terrain colonized by various communities that claim the right to define competence in their domain.

³ The notion of landscape of practice also differs from that of a “network of practice” which Brown and Duguid (2001) propose to distinguish close-knit communities from looser networks oriented to the same practice. We are less concerned with the different types of social formations that can sustain a given practice than we are with the multiplicity of practices involved, the importance of boundaries among them, and with problematizing identification and knowledgeability across these boundaries.

In this sense the landscape of practice is political. The power dynamics of defining competence inherent in communities of practice have a counterpart among practices. A landscape consists of competing voices and competing claims to knowledge, including voices that are silenced by the claim to knowledge of others. This creates knowledge hierarchies among practices. In such a political landscape, there is no guarantee that a successful claim to competence inside a community will translate into a claim to “knowledge” beyond the community where it is effective. Whether the competence of a community is recognized as knowledge depends on its position in the politics of the landscape.

The landscape is flat: the local nature of practice

A more traditional view of knowledge suggests that knowledge flows from practices that produce it to practices that receive it: whether it is top-down, north-south, or centre-periphery; and at times it seems as though communities even conspire to keep it that way. A colleague was doing a detailed ethnographic study in a hospital. She observed a clear hierarchy of practices. For instance, she said that when a group of nurses have an idea about what to do about a patient, they “do this little dance” (her expression with a corresponding hand gesture) to make sure that it looks as though the idea came from the doctor.

The nurses’ story illustrates the pervasive power of a “hierarchy of knowledge”; but it also suggests that the hierarchical view misses something important. Even if they conspired to make it invisible, the nurses had their own understanding of the patient, which reflected their perspective and experience. The hierarchy was real enough, but it masked a more complex reality.

In a landscape, all practices are practices. Regulation, management, and research are practices too, with their own local regimes of competence, just like frontline work. In this complex system, no practice can claim to contain or represent the whole, even if, like policy-makers, managers, or development agencies, they have the power or resources to influence large regions of the landscape with their perspective. Scale is not free. Collecting data for research, extracting measurements for management, or using financial rewards for compliance can achieve scale, but it loses some of the texture of the experience of practice itself. Therefore, all practices in the landscape have a fundamental “locality.”

There is an internal logic to any practice because it is the production of the community that engages in it. A mandate or a set of standards may give rise to a practice, but they do not produce the practice; the practitioners do. It is their practice even if it is produced in compliant response to a mandate. Similarly, regulations inform practice in the sense that they become an influential element of judgment; but regulations do not produce practice: even a practice of strict compliance is produced by the practitioners.

That one practice has more power than another in the landscape does not mean that it “subsumes” the other. In other words one practice cannot have such control over another that it replaces the internal logic and local claim to knowledge of that other practice; the knowledge of one practice is never merely implemented in another. Practices in a landscape inform and influence each other. For instance, a detailed national curriculum with minute prescriptions and regular inspections will definitely influence the practice of teachers. Such radical combination of

curriculum design and enforcement may silence the perspectives of teachers or render the competence of their practice invisible or irrelevant. It may even sap their enthusiasm and engender a practice of cynicism and passive resistance as a response. But engendering such a response is not the same thing as one practice subsuming another. Engagement in lived practice is too complex and dynamic to be a mere implementation of prescription or the simple application of research. There is local knowing in each practice, whether or not this local knowing is recognized as knowledge in the broader landscape. Without denying the reality of the power dynamics among practices, there is a sense in which the landscape is flat. Relations among practices are at once epistemologically flat, politically unequal, and potentially contestable.

The landscape is diverse: boundaries of practice

If a practice could subsume another, then the boundary between them would be unproblematic. Practitioners would simply implement regulations, mandates, and evidence-based prescriptions. But meaning is produced in each practice. Because this makes mere subsumption impossible, relationships between practices are always a matter of negotiating their boundary. Without subsumption, the boundaries between practices are never unproblematic, in the sense that they always involve the negotiation of how the competence of a community of practice becomes relevant (or not) to that of another.

Boundaries of practice are unavoidable. A practice of any depth requires a sustained history of social learning, and this creates a boundary with those who do not share this history. Boundaries of practice are not necessarily formally marked, but they are unmistakable. Spend your lunch break with a group of computer geeks and you know what a boundary of practice is: you can't make sense of what they are talking about or why they are so passionate in talking about it. You might as well have landed on another planet.

Because of the lack of shared history, boundaries are places of potential misunderstanding and confusion arising from different regimes of competence, commitments, values, repertoires, and perspectives. In this sense, practices are like mini-cultures. Even common words and objects are not guaranteed to have continuity of meaning across a boundary. And the boundaries between the practices involved are not necessarily peaceful or collaborative. What researchers find, what regulators dictate, what management mandates, what international development agencies try to make happen, what clients expect, and what practitioners end up deciding, all these attempts to colonize moments of practice can be in conflict—hidden or open.

At the same time, boundaries hold potential for unexpected learning. The meetings of perspectives can be rich in new insights, radical innovations, and great progress. The name of a discipline like psycho-neuro-immunology reflects its birth at the boundaries between practices. Engaging at boundaries can expand what a community sees as important or even core to its practice. Of course new insights are not guaranteed and the likelihood of irrelevance makes engagement at the boundaries a potential waste of time and effort. Indeed, competence is less well defined at boundaries. As a consequence, the innovation potential is greater, but so is the risk of wasting time or getting lost.

Crossing boundaries, boundary encounters and boundary partnerships are necessary for the integration of a landscape of practice. In a complex landscape in which no practice simply

subsumes another, boundaries of practice are interesting places. Crossing a boundary always involves the question of how the perspective of one practice is relevant to that of another. It is connecting two forms of competence whose claim to knowledge may or may not be compatible. Therefore, boundary crossing and boundary encounters are crucial aspect of living in a landscape of practice.

Boundaries as learning assets

Pedagogically it might be tempting to hide the importance of boundaries under the guise of a reified, self-standing curriculum, that is, to make it seem as though what is taught in a course represents a body of knowledge unproblematically applicable to practice. Such an approach certainly simplifies teaching as well as testing.⁴ Rather than hiding boundaries under an illusion of seamless applicability across contexts, it is better to focus on boundaries as learning assets. Such an approach confronts explicitly the problematic nature of boundary crossing and the potential tensions or conflicts between practices as sources of accountability. It does so in order to bring out the potential of boundary encounters to generate new insights. This focus on boundary encounters suggests the following questions:

- What kind of boundary activity, joint project, visit, mutual storytelling or learning partnership can serve as a productive encounter for negotiating and exploring a boundary?
- How to use boundaries systematically to trigger a reflection process about the practices on either side?
- What kind of boundary objects and activities can support this boundary-oriented pedagogy and create points of focus for engaging multiple perspectives?
- Who can act as brokers to articulate regimes of competence across boundaries?

The principle is to systematically make boundaries a learning focus rather than assuming or seeking an unproblematic applicability of knowledge across practices. Bringing together multiple voices that reflect the structure of the landscape is crucial in several respects. First it helps people locate themselves in the landscape and its constitution through the politics of knowledge. Done sensitively it can enhance the potential for reflexivity in the practices involved: it is difficult for communities of practice to be deeply reflective unless they engage with the perspective of other practices. Combining multiple voices can produce a two-way critical stance through a mutual process of critique and engagement in reflection. For instance, a practitioner taking a university course can use theory as critical stance toward practice; and then conversely use practice as critical stance toward theory. Another example is the problem of using research as evidence base: how does evidence translate into practice without robbing practice of its own engaged logic, what kind of boundary processes would facilitate this translation, and what kind of local reflective communities can help research be used productively in practice? This highlights the importance of intentional moments of boundary crossing and boundary encounter that enable first-hand experience of the potential pitfalls, misunderstandings, and innovative opportunities of relevant boundaries.

⁴ Because this misleading simplification makes things easier pedagogically for all stakeholders in educational settings, Spiro and colleagues (1987) call it appropriately a 'conspiracy of convenience.'

Knowledgeability in a landscape of practice

We cannot be competent in all the practices in a landscape, but we can still be knowledgeable about them, their relevance to our practice, and thus our location in the broader landscape. When considering an entire landscape, claims to knowledgeability are an important aspect of learning as a social process.⁵

Learning as a journey through a landscape: identification and dis-identification

If a body of knowledge is a landscape of practice, then our personal experience of learning can be thought of as a journey through this landscape. Reflecting on our own trajectories as learners, most of us will be amazed at how many practices we have engaged in, dabbled in, visited, encountered, or avoided over the years. In some cases, joining or leaving a practice involved crossing a significant boundary and constituted a major event or transition.

As a trajectory through a social landscape, learning is not merely the acquisition of knowledge. It is the becoming of a person who inhabits the landscape with an identity whose dynamic construction reflects our trajectory through that landscape. This journey within and across practices shapes who we are. Over time it accumulates memories, competencies, key formative events, stories, and relationships to people and places. It also provides material for directions, aspirations, and projected images of ourselves that guide the shaping of our trajectory going forward. In other words, the journey incorporates the past and the future into our experience of identity in the present.

Participation in a landscape provides the constitutive texture of an experience of identity. Through our journey, the landscape shapes our experience of ourselves: practices, people, places, regimes of competence, communities, and boundaries become part of who we are. Shaped by our journey through the landscape, our identities come to embody the landscape through our experience of it. They become personalized reflections of the landscape, its practices, and its boundaries. As a workbench for our learning, our identities replay and rework these relationships. Using our own experience as an example, we are both theorists and consultants. This boundary between practices is something we constantly carry in ourselves. And we have to manage it. When do we bring out what part of ourselves? Does our theorist side feel betrayed if we use a simpler but less accurate term to describe a phenomenon to a client? Does our consultant side feel threatened when we feel energized by an idea with little concern for what our client would be able to do with it on Monday? We feel torn at times and wonder whether we can be competent in both. Overall, however, we enjoy the straddling of this boundary and its mirror image inside. We find it productive, even while it is challenging identity work where boundaries that exist in the landscape reflect and replay in our identities.

⁵ The term knowledgeability was already present in early versions of the theory (see Lave and Wenger, 1991, and Lave, 2008) to insist that the outcome of participation in practice is always an embodied state of the living person rather than just knowledge. Giddens (1984) also uses the term to refer to the state in which members of society act with some general knowledge about their society and its norms (though he is careful to insist that acting knowledgeably does not exclude unintended consequences, and therefore that knowledgeability is always partial). We use the term in alignment with these two senses, but now more specifically in contrast to competence to define two types of relationships to a landscape of practice.

Not all the practices we interact with or the boundaries we cross have the same significance, of course. Our journey creates a variety of relationships to locations in the landscape. Some we enter fully and some we visit, merely catch a glimpse of, or ignore altogether. Some we explore deeply and some remain foreign. With some we identify strongly, with others lightly, and with many not at all. Some we exit and some we distance ourselves from. The danger of the journey metaphor might be to suggest that these relationships are merely individual decisions. The landscape, however, is well colonized and some hills are well guarded. Some communities may welcome us, while others may reject us. The experience can be one of painful marginalization or merely the chance to move on. Through it all, the journey shapes us via experiences of both identification and dis-identification.

Finding oneself in a landscape: modes of identification

We can only participate actively in a few practices in a landscape. Even so, many practices we don't personally participate in can become part of our experience and contribute to our identities. To describe how we inhabit a landscape of practice and build our identities in it, it is useful to distinguish between three distinct modes of identification⁶ that position our learning in that landscape.

Engagement: This is the most immediate relation to a landscape of practice—engaging in practice, doing things, working on issues, talking, using and producing artifacts, debating, and reflecting together. On our learning journey, engagement gives us direct experience of regimes of competence, whether our engagement is a visit or a lifetime commitment, whether the result is an experience of competence or incompetence, and whether we develop an identity of participation or non-participation. Still there is no substitute for direct engagement in practice as a vehicle for learning the competence of a community.

Imagination: As we journey through a landscape we are also constructing an image of the landscape that helps us understand who we are in it. If you work as a nurse in a given hospital, you know that there are countless other nurses working in other hospitals and you can use your imagination to create a picture of all these nurses and see yourself as one of them. We use such images of the world to locate and orient ourselves, to see ourselves from a different perspective, to reflect on our situation, and to explore new possibilities. The world provides us with many tools of imagination and material for the work of imagination (e.g., language, stories, maps, visits, pictures, TV shows, role models, etc.). These images are essential to our interpretation of our participation in a landscape. Imagination can create relations of identification that are as significant as those derived from engagement.⁷

⁶ These modes were called “modes of belonging” in Wenger (1998), but we now think that the term “mode of identification” is more accurate.

⁷ We use imagination here in the sense proposed by Benedict Anderson (1983) to describe nations as “imagined communities”: it does not connote fantasy as opposed to factuality. Knowing that the earth is round and in orbit around the sun, for instance, is not a fantasy. Yet it does require a serious act of imagination. It requires constructing an image of the universe in which it makes sense to think of our standing on the ground as being these little stick figures on a ball flying through the skies. This is not necessarily an image that is easy to derive from just engaging in activity on the earth. Similarly, thinking of ourselves as member of a community such as a nation requires an act of imagination but it is no less “real” for involving imagination. Benedict Anderson notes that people are ready to kill and die for their “imagined” nations.

Alignment: Our engagement in practice is rarely effective without some degree of alignment with the context—making sure that activities are coordinated, that laws are followed, or that intentions are implemented. If you work as an architect, it is essential to know how to produce plans that will allow members of various trades to contribute to the construction of a well-designed building. Enabling alignment around your design across the landscape is part of your identity as a professional. Note that the notion of alignment here is not merely compliance or passive acquiescence; it is not a one-way process of submitting to external authority or following a prescription. Rather it is a two-way process of coordinating enterprises, perspectives, interpretations, and contexts so that action has the effects we expect. Following directions or negotiating a plan are forms of alignment as are enlisting a colleague's collaboration or convincing a manager to change a policy. Whichever way they go, these processes of alignment give rise to relations of identification: applying the scientific method, fighting a law we find unjust, abiding by a moral code, joining a strike, or recycling are all processes of alignment that can become very deep aspects of our identities.

These different modes of identification are ways to make sense of both the landscape and our position in it. All three can result in identification or dis-identification, but with different qualities and potentials for locating ourselves in the landscape.

Identification at multiple levels of scale

Relationships of identification and dis-identification created through the various modes can be local but they can also extend across the whole landscape. All three modes function both inside practices and across boundaries:

- Engagement is typical of participation in the communities we belong to, but it can also be a way to explore a boundary if we can have enough access to another community of practice willing to engage with us.
- Imagination functions inside a community as members make assumptions about each other, recall the past, and talk about their future, but it can also travel without limits and is a way to experience identification way beyond our immediate engagement.
- Alignment is a central element of a community's local regime of competence, but it is also essential to the functioning of broader systems, such as agreeing on the strategy of an organization, deciding on the laws of a country, or enlisting stakeholders in addressing a global challenge.

Operating within and across practices, the combination of these different modes produces identification at multiple levels of scale all at once. For instance, teachers can identify (or dis-identify) with the teachers in their department, school, district, region, discipline, country, and even with all teachers in the world. Resonance may be stronger at some levels than others. Some teachers may identify most strongly with their school, some with their discipline, and some with their national curriculum. With some levels they may actively dis-identify, for instance, by dismissing the relevance of a regional policy. But this ability to define our identities at multiple levels of scale is essential to locating ourselves in a landscape that extends beyond the practices we are directly involved in.

Knowledgeability in a nexus of identification

While these modes of identification are distinct, it is in combination that they are the most effective. Engagement without imagination or alignment is at risk of local blindness—this is the way we do things here because we have always done them this way. Alignment without engagement or imagination often leads to unthinking compliance. Neither engagement nor alignment by themselves will necessarily provide material to develop a solid sense of orientation in the landscape. Imagination is needed to reflect, see oneself in a broader context, or envision a different future. But imagination by itself can be floating and therefore gains from being anchored in engagement and translated into alignment. Becoming productive in a landscape depends on one's ability to leverage the complementarity of these processes.

Through a combination of engagement, imagination, and alignment, participation in a landscape creates a complex nexus of identification and dis-identification. Our trajectory develops sequentially as we travel through the landscape and carry our identity across contexts. It is also simultaneous as we experience identification with multiple locations and boundaries at any given time. We experience all these forms of identification at once and in one body—whether they merely coexist, complement, enhance, or conflict with each other.

An interesting question is: How does this nexus of identification become a coherent experience of knowledgeability? We expect practitioners to be competent in their own practice; and we also expect them to be knowledgeable with respect to practices in the landscape relevant to their specialization. When engaged in the provision of a service, practitioners act as representatives of the relevant landscape of practices, some of which they will directly engage in, some of which will have a direct impact on their access to resources for learning, and some of which are much more distant. Practitioners “represent” this landscape through experiencing:

- Their own forms of competence in key communities of practice
- Their participation in multi-disciplinary work, where working itself is a direct boundary encounter with other disciplines
- Their relationships of engagement, imagination, and alignment with regard to various practices in the landscape
- Their struggle with the boundaries among practices, which can take place through all three modes of identification, but is not less significant for being vicarious, whether it involves imagination or an attempt at alignment

Knowledgeability entails translating this complex experience of the landscape, both its practices and their boundaries, into a meaningful moment of service. The ability to do this depends on the depth of one's competence in one or more core practice(s), which ground the experience of the landscape in specific locations; and it also depends on one's knowledgeability about other practices and significant boundaries in the landscape. In this sense, knowledgeability is not defined with respect to the regime of competence of any single community, but within a broader landscape that includes a set of practices beyond a person's ability to claim competence in all. We will use the term *knowledgeability* to refer to the complex relationships people establish with respect to a landscape of practice, which make them recognizable as reliable sources of information or legitimate providers of services. Like competence, knowledgeability is not merely an individual characteristic. It depends on claims to have insights into practices in the landscape

and social expectations concerning the value of these practices. Whereas claims to competence are negotiated within the politics of competence of a community of practice, claims to knowledgeability are negotiated within the politics of knowledge in a landscape of practice.

Learning to become a practitioner is not best understood as approximating better and better a reified body of knowledge. Rather it is developing a meaningful identity of both competence and knowledgeability in a dynamic and varied landscape of relevant practices.

Knowledgeability as the modulation of identification

Knowledgeability is a complex achievement. It combines many relationships of identification and dis-identification through multiple modes. These relationships to the landscape are resources and fragments of experience to be assembled dynamically in moments of engagement in practice. Practitioners need to negotiate their role, optimize their contribution, know where relevant sources of knowledge are, and be practiced at bringing various sources of knowledge to bear on unforeseen and ambiguous situations. From this perspective, knowledgeability is an improvisational dance in which identification is modulated: in a given context, which sources of accountability to identify with and to what extent are these expressible?⁸

Identification and accountability

Identification is a key factor in shaping knowledgeability because it implies accountability. Over the course of our journey, we encounter countless practices where we have no competence, and never will, by choice or necessity. How we experience such non-participation depends very much on our form of identification with a practice. We said earlier that we were happy not to be lawyers after seeing the series of thick volumes on our friend's shelf. We are not embarrassed to say that their content is largely incomprehensible to us; this has not led us to have an identity crisis. Our identities are not invested in that practice and therefore we don't feel accountable to this collection of big books or other sources of knowledge that our friend would find essential.

By contrast if we are caught misquoting, misunderstanding, or not having read a major piece of work in social learning theory (which happens more often than we like to admit), it does pose a challenge to our identities. We hold ourselves accountable to this regime of competence because our identities are invested in this community. Similarly but to a lesser degree we feel accountable to a broader set of academic communities as we need to be knowledgeable about work in neighbouring communities, in social theory, for instance.

When one considers a whole landscape, accountability gets more complicated. Should a nurse be accountable to a university curriculum, to research, to management, to regulations? To all of them? What about close colleagues? What about personal experience? This often depends on the context. In any given situation, which sources of accountability matter? Does the new regulation apply to this specific case? What did "they" intend with it anyway? Do I follow the advice of a colleague? She seems competent and she hangs out with reliable people. Should a recent directive from management trump all other considerations? They could not possibly mean that? Can I trust my own experience? It is up to par? What about this paper about recent research that seems to

⁸ See (Wenger, 2009) for an initial discussion of issues of accountability and expressibility.

cast some doubt on prevailing wisdom? The statistical analysis seemed a bit shoddy. If a practitioner serving a client represents the whole landscape of practice for that person, then in each moment of service, he or she has to resolve the question of where to be accountable. This dynamic modulation of accountability is quite a dance of the self, especially where there are conflicts at boundaries in the landscape.

Identification and expressibility

We have mentioned earlier that our accountability across the boundary between academe and consulting complicates our life. It provides interesting resources for knowledgeability, but the knowledgeability that we derive from walking that boundary is not expressible in all contexts. Often our identification with being both theorists and practitioners is not fully expressible either in a consulting assignment or in an academic discussion.

Certain aspects of one's identity will be more or less expressible in a situation—a competence gained through engagement in a shady practice, an imagined future such as the dream of becoming a novelist, or identification with a moral standard that demands alignment, like being a vegetarian. In your team, how expressible is your passion for origami, your gender, your religion, or your experience as a parent? And how personally important or practically useful is it that each of these be expressible? In a given context, how much of one's full range of experience is expressible? And when does it matter? What level of identification is associated with inexpressible regions of knowledgeability, with what consequences for one's experience of participation?

To be fully realized, knowledgeability in a landscape requires that accountability to one location be expressible in another. But accountability and expressibility can be in conflict. Many students with substantial practical experience decide not to express this experience when they go to the university to gain a qualification. There, they become expert students accountable to the genre of academic writing. They feel that they have to ignore their experience of practice to fit the academic model when composing a term paper. Conversely, when they are at work, many find it difficult to make use of theory to rethink a vexing problem. Crossing a boundary can force one to marginalize aspects of identity if some forms of identification from one context conflict with claims to competence in another context. Such marginalized aspects of identity can even become completely inexpressible.

Modulating identification

One way to conceptualize learning in landscapes of practice is to think of knowledgeability as the modulation of identification. This takes place across multiple potential sources of accountability and contexts of expressibility. It is sometimes a matter of personal choice and sometimes a reflection of the landscape—often a bit of both. As the world becomes more complex, there are an increasing number of locations in the landscape that can act as sources of identification or a context for expressibility. Should I keep track of that blog, read that scientific journal, follow that twitter stream, subscribe to that website, go to that conference, or join that online discussion board? How do I modulate my identification with various locations in an increasingly complex landscape? How does the modulation of identification and dis-identification create an individualized claim to knowledgeability over time and across contexts? Are there places in which my identification across the board is expressible? Negotiating a manageable identity of

knowledgeability is becoming quite a task. It is a central challenge for professional learning today—and to a large extent, for learning more generally.



Picture courtesy of U.S. Library of Congress

Moving on

Theory is a lens through which to see the world. We invite you to put on this lens for a moment to reflect on your own trajectory through a landscape. Behind you. Ahead. What are the locations you identify with? What are those you don't? How accountable do you feel to their practice, their competence, their perspective?

What does your journey through the landscape look like? Have you been to the top of a hill, a master practitioner, your identity secure in the regime of competence of that practice? What were the boundaries that distinguished your hill from neighboring ones? What challenges did that evoke?

Or have you covered lots of ground, walking in the valleys, trekking up different hills only to resume your path? Does your journey look like a series of expeditions, an odyssey, a constant flight, or a search for home? Have you crossed a boundary that has challenged your sense of who you are?

Are there places where your accountability to one community, your engagement in its practices, is inexpressible in another? Do you feel that you can be fully yourself there? Do you modulate your identification to establish a distance between you and their practices? Do you feel less accountable? Or do you embrace the tension between the perspectives, reworking the boundary in your own experience? How does this add to your knowledgeability of the landscape?

This is a snapshot of you on your journey, with your history and your aspirations, the result of points of inflection along the way, a mix of intentionality and circumstance, triumphs and failure, rejection and acceptance. It is your identity.

Perhaps one day we will visit your landscape and you will be able to tell us where to visit, what to look out for, and who we'll cross paths with. And we'll thank you for your knowledgeability. And for the opportunity to expand ours. Then, together or separately, we'll move on.

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Part II

Stories from the landscape

Placeholder: Four chapters with stories relating the experience of living in the landscape.

Part III

Convening

In Part II we looked at landscapes of practice from the perspective of those living there. In Part III we take a different view and consider the work of people who take a "systems" view of the landscape and who work actively to enable new learning. These "systems conveners" act to reconfigure the landscape by forging new learning partnerships across traditional boundaries.

To bring this emerging role to life, we have invited some conveners we have worked with to contribute their voice to the conversation. We start with a chapter that introduces the concept of systems convener and its connections to the theory. Helped by the words of two systems conveners we have worked with we explore the challenges that systems conveners face, the type of work they do, and the personal characteristics they bring to their role. The two chapters that follow describe how these challenges have been addressed in two large-scale projects. The stories of these projects are told from the perspectives of the conveners in their complex landscapes.

The conveners in Part III all talk about cultivating communities of practice. So far in this book the concept of community of practice has been used analytically to explicate the structure of the landscape, its practices, and its boundaries. For conveners, however, communities of practice are primarily interventions in the landscape. Along with networks, projects, conversations, and relationship building, communities of practice are ways for conveners to forge new learning partnerships, create new capabilities, and enable new identities in the landscape. When these conveners cultivate communities of practice as interventions in the landscape, they bring together people from diverse locations in order to transform practice. These people may not see each other as obvious learning partners; they may in fact come from very different or even conflicting perspectives. Helping them recognize the potential value of forming a learning partnership oriented to transforming practice usually takes work. Boundaries have to be negotiated; commonalities have to be discovered; perspectives have to be realigned; and enough trust has to be built that people can start to learn together by inspecting their practices and related boundaries. When these conveners adopt this approach, what they cultivate are indeed communities of practice—not in the simple sense of having the same practice, but in the more complex sense of forming heterogeneous learning partnerships to transform existing practices or create new practices.

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.⁹ 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.¹⁰ Our focus, however, is on *people* who act as

⁹ 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 convener 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, 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 convener 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: <http://collaborativeleadersnetwork.org/>).

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.¹¹

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.¹²

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.

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 to have each 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.

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.

The chapter is divided in 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.

¹⁰ Melinda Gates of the Gates Foundation describes the Foundation as a convener of people and projects (<http://www.economist.com/node/7112702>). The former senior partner of strategy and innovation at The World Bank refers to the bank as “Convener first, lender second” (http://www.huffingtonpost.com/dennis-whittle/the-world-bank-as-conve_b_910382.html). The Clinton Global Initiative proposes to use “convening 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/>)

¹¹ In a Times article (November 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.

¹² In this chapter, when we use the term convener for simplification, we are referring to “systems convener.”

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 brings 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 are 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,

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)

including from practitioners of various communities, their organizations, sponsors, and other potential stakeholders.

Conveners learn to respect the role of boundaries, even when they seem to come in the way of quickly discovering mutual interest. It is not realistic to uproot people and enlist their participation in a completely new endeavor so 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.

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)

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.

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

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, our italics)

Conveners have to engage with power without letting it come 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 an effort to invite everyone and give voice to their various 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

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

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.

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)

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 reconfiguring a landscape in fast-changing times conveners are also faced 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 in learning and 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 need reinitiating. The art of systems convening is to sustain a consistent trajectory for a complex endeavor amidst all these changing and unpredictable circumstances.

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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

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)

come about with the short-term results that will keep people and organizations working with them.

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.

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.¹³ 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

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)

¹³ 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 mobilise local participation.

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.

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)

Many systems conveners are practitioners in their

field. Some are strategic thinkers. But they often do not have much experience designing for

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)

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

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 emergent¹⁴, from introspective to observing the practices of others.¹⁵
- *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 group 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

¹⁴ 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.

¹⁵ In her dissertation, Sue Smith has identified four different types of learning spaces in her work as a convener: 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, 2009).

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.

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 trade offs, 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)

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 it 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. 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 produce 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 an 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 convener'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 convener: 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 convener 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 convener. 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

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

journey as a source of inspiration for creating aspirational narratives. It is also what sustains them through uncertainty, lack of recognition, outright opposition, and even doubt about themselves.

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)

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

(AKA)

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)

We have not yet met a convener who micro-manages. They find the right people to take leadership and work with them or take a back seat on the implementation. They welcome and appreciate others' enthusiasm for the endeavor and respect the integrity of their commitment. There

are, however, vulnerabilities for conveners in this openness to others taking leadership. They can find it difficult to assess others' 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. While they have to give credit for results to those who join them and take leadership in the endeavor they often risk prematurely losing the resources for their own work.

It is difficult to describe what 'goes 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 Chap. 9)

Passionate and strategic

Driven by their passion, conveners are idealistic and given to impatience. There is a pioneering spirit in most conveners we meet.¹⁶ 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 not about to let concerns for details come 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

¹⁶ 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 convener is to change 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.

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

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)

Mavericks in their organizations, conveners often 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. 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.

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

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)

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 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

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).

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

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)

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

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)

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.

A discipline of systems convening: leadership for the 21st 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 21st 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.

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Habiforum: convening stakeholders to reinvent spatial planning

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Habiforum is the name of a project initiated by the Dutch government to facilitate the transition from traditional top-down spatial planning, or development of plans for land-use to a new inclusive paradigm involving all stakeholders in a broader process of area development. The practices that needed to be cultivated under this new paradigm were not known when the project began. The hope was that the right practices would emerge if the project took up the following series of actions: explicitly convert the spatial planning agenda to this new paradigm, convene stakeholders and professionals from different fields, and help them work together more deliberately to develop new approaches and methodologies.

This chapter starts by giving a picture of the challenge of traditional approaches to spatial planning and then describes how Habiforum has convened stakeholders from different fields in ways that engage them in a broader and more involved process of area development. A reflection on the different projects highlights some of the convening practices that contributed to its successes as does a reflection on the role of the “master” convener in the Habiforum project.

Fragmentation in a complex landscape of practice

In a small country with a large population like the Netherlands, space is a scarce resource. Spatial planning is a complex process that involves a wide range of stakeholders with diverse and often conflicting practices and interests, and with varying ability to influence the results. This landscape of practice includes government agencies from national to local, architects, developers, landowners, not for profit organisations, as well as local communities, businesses, and scientists. Traditionally, these actors have maintained clear boundaries to keep the process simple and to avoid conflicts of interest. Professionals from different disciplines largely work in isolation. There is little interaction among different government levels, policy-making and project work, public and private organisations, and competing firms. Scientists and practitioners live in different worlds.

Traditional spatial planning has too often led to the alienation of communities and other stakeholders affected by the planning process. The expectations of all involved are diverse and, at first glance, irreconcilable. The highest government level involved, often a federal or regional agency, by and large dominates the process. The master plans and generic directives prescribed by federal or regional governments often fall short of meeting the requirements of specific situations and local contexts. The dynamics of environmental circumstances, local histories, and diverse stakeholders do not comfortably align with broader financial, industrial, or economic policy

Typical Habiforum project 1: The Overdiepse Polder

Located in a southeastern province of the Netherlands the Overdiepse Polder was designated by the federal government as a buffer area to temporarily store excess water when rivers reached high levels. It was part of a nation-wide project called 'Room for the river', but it did not follow the traditional approach of a federal agency leading the design and planning of the 'best solution.' Such top-down solutions would easily conflict with the interests of the farmers who lived and worked in the reclaimed marshland of the polder. To prevent a potential stalemate—the government wanting to displace farmers to create a spillway and farmers not wanting to leave—ample space was given to experiment with novel solutions that would meet the seemingly intractable interests of all stakeholders. Facilitators from the Habiforum community helped the different stakeholders through a process of generating ideas by engaging at the boundaries between formal organizations and informal networks, the interests of water storage and agriculture, and the development and implementation of policies. Although the regional government was formally appointed as the project leader, local residents and other stakeholders took an active leadership role in the process. This unusual approach resulted in a remarkable solution. The Overdiepse Polder would become a spillway but the government would also construct a number of mounds along the southern edge that could withstand high water levels. New farms could be built on these mounds – or *terps* – and most farmers would be able to stay.

Footnote: An article about this project appeared in the New York Times, Feb 13, 2013, entitled "Going with the flow": <http://www.nytimes.com/2013/02/17/arts/design/flood-control-in-the-netherlands-now-allows-sea-water-in.html?pagewanted=all>".

objectives and priorities. As a result plans and proposals developed on the drawing tables of federal and regional governments tend to fall short of meeting the needs and expectations of local stakeholders.

On paper, the planning process is neatly arranged along a linear path from the exploration of a situation, to a proposal to proceed, to the development of a spatial plan, and to implementation and maintenance. The plan specifies objectives to be reached in a certain time-frame. In practice, the process is more problematic. Challenges typically consist of an intricate web of interconnected problems, some technical, others economic or social. The precise outcomes are not certain. Stakes are high and stakeholders often disagree on the problem and its solution. Some seek change while others keep pushing familiar, standardised solutions that keep the status quo. The fragmented nature of spatial planning encourages people to defend the positions represented by the group they feel most accountable to. Stakeholders are more interested in their stake in the negotiation than in the overall quality of the final design. New ideas and concepts are often marginalized because they only complicate an already tough negotiation process. As a result many of these problems can have long histories that sometimes last for decades. And even when solutions are reached, they are often suboptimal compromises that lack aesthetic and innovative integrity.

By contrast, the best solutions to complex spatial planning challenges are tailor-made and developed locally with all stakeholders working closely together. This approach to planning is less about the arbitration of competing views than one of partnering in and facilitating development. It requires careful consideration of how to create a process where constructive conversations between stakeholders can happen. The approach that fulfills this requirement is referred to as 'area development'. The case of the 'Overdiepse Polder' (see box 1) illustrates the strength of this approach.

Convening as an approach to innovation

The approach taken in the Overdiepse Polder has its history in a long-running project. In the late nineties, a small team at the Dutch Ministry of Transport, Public Works and Water Management launched the idea of a knowledge-creation programme solely focused on developing innovative approaches to spatial planning. They knew that any programme that took up this challenge would need to come from outside the Ministry, which had dominated the field for so long. Only an independent organisation would be able to break the perception of inequality between the Minister and other public and private parties involved, and challenge entrenched ways so they could explore new approaches. Since its inception in 1999, what became known as Habiforum operated as an independent entity. Soon after seconding a member of his staff from the Ministry to Habiforum, Ab van Luin, a self-professed "coalition builder"¹⁷, decided to join the project himself as deputy director. Ab took up responsibility for Habiforum's practice program, which complemented the academic programme and aimed to create new professional practices in the field of spatial planning.

The initial idea was to create a centre of excellence that would bring together selected experts to develop a new approach. When that failed to materialize, Ab rewrote the proposal to focus instead on an "expertise network", with only a small staff supporting a large network of partners and professionals. His vision was that they would be able to use the expertise spread across the landscape of practice rather than relying on a single center acting as the source of knowledge. Forming a network was an open invitation to professionals and organisations from all branches of spatial planning to work together in creating new knowledge and practices. Ab became a systems convener.

In his attempt to reconfigure the landscape, Ab's first action was to invite a range of professionals from different streams in spatial planning as well as from the field of organisational learning to submit proposals for creating new practices together. The condition was that each proposal had to be submitted by a consortium of different partners. To stimulate the formation of new consortia he organised a series of meetings to bring a diversity of people and organisations together. His intention had been to finance one or two of the best proposals, but this changed after a

¹⁷ Ab van Luin has a personal website called "Spade" where he describes himself as a "space maker and coalition builder. He helps ... project teams, organizations and networks to allow for the formation of producing coalitions with people who want to make a difference space." (sic) <http://www.spadenet.nl/over-spade.html>. He offers "Practice Learning ... at the start of a project as teams of client and each to know, learning to work with new contract and/or in complex situations and sustainable working arrangement want to make with each other" (sic) <http://www.spadenet.nl/praktijkleren.html>

Typical Habiforum project 2:

Renewal of rural areas

Habiforum hosted a series of projects concerned with developing a customised approach to the renewal of rural areas. The projects were attempts to restore quality of life and vitality in areas that had complicated, area-specific problems. The kinds of problems include an exodus of farmers, an increase in large-scale farming concepts ill-suited to the land, shrinking areas, and migration of residents between regions. Each project required tailored solutions and policies as well as new relations with government agencies. Yet the projects also shared fundamental questions about the respective roles of regional and local governments, residents, and private companies. The traditionally dominant role of government had often left the entrepreneurial potential and social capital of both residents and companies largely untapped. Each project needed to tread a delicate path toward the goal of engaging the experience, networks, expertise, and ideas of all stakeholders. A renowned advisor in the field leveraged the shared context of Habiforum to bring these pioneers together in a community of practice to make progress on these fundamental challenges in area development. Over a period of two years, the community of practice worked on five concrete projects. Members included policy makers, entrepreneurs, and consultants, who were each experimenting with new ways of working in their respective domains. By sharing stories, ideas, and experiences across projects and professions, they developed innovative practices to increase the voice and responsibility of residents in the development of the rural area where they lived. Their efforts led to new kinds of public-private cooperation and strengthened the social capital of areas where projects were run.

conversation with one of the applicants. The applicant, an internationally renowned landscape architect, pointed to the high quality of the proposals and asked why Habiforum did not simply take them all. In response to that idea Ab put together a co-financing model in which Habiforum financed up to half of a proposal and the applicants the rest. A prerequisite for receiving matching funds was a commitment to share all learning from the projects openly, in gatherings with others, in booklets, and on the internet.¹⁸ This model certainly contributed to the commitment of organisations to participate actively in Habiforum's network and to share their knowledge and experience.

Around that time, Ab came across the concept of communities of practice in a magazine. After exploring the concept further, Ab realised that the team's intuition "suddenly had gotten a name." He saw this approach as a way for all kinds of people working in the domain of spatial planning to come together across professions, hierarchies, and formal organizations. They could bring diverse perspectives to bear in forging new knowledge and practices to address the most difficult challenges in the field.

'We got to work with communities of practice in 2000 with only that basic awareness and an attitude that experience is always the best teacher. Just meeting does not lead to anything new. Sharing knowledge is not enough. The key is to create knowledge. To do so requires both universities that do basic research and a range of professionals who carry

¹⁸ For information about the series of community meetings, range of books and website, see www.habiforum.nl and it's successor www.nlbw.nl (in Dutch).

out the work in practice. I saw an opportunity for both to work together in communities of practice’.

Through the idea of communities of practice new configurations of people and organizations were formed around a range of topics like business parks, water and space, regional nodes, city regeneration, and rural areas renewal (see box 2). Each community worked in partnership to explore concrete cases that would help them develop better solutions. Although networking and convening new cross-boundary communities across the landscape was central to Habiforum, not all attempts at crossing boundaries were successful. At the core of the vision of Habiforum was the cross-fertilisation between research and practice. By actively sharing their knowledge, researchers and practitioners would enrich their respective work and out of this synergy produce new approaches. This initial aspiration was not achieved, however: although research and practice development were linked at the project level, the boundary between them proved impermeable. For administrative reasons research and practice were organised as independent programmes with separate budgets and proposal submissions. A professor with a very high reputation in the field headed the research programme and coordinated it from his university. Ab, who was the director of the practice programme, worked from Habiforum’s office. They organised their programmes in fundamentally different ways. In contrast to Ab’s approach of including different voices from across the landscape in an exploratory way, the scientific director wanted specific topics to be rigorously researched with specific outcomes before being applied in the programme.

The two perspectives on the nature of knowledge, its creation, and application only grew further apart as the practitioner programme developed and the difference in outlooks between practitioners and researchers became clearer. Practitioners consider research insights as one of many sources to inform their practice. Researchers tend to adopt the subsumption perspective described in Chapter 1. In their eyes the outputs of research are to subsume the perspectives of practitioners: they presume that once research has created and articulated new insights, practitioners will simply apply this knowledge in their practice.

Despite Ab’s optimism, the difference turned out to be irreconcilable. The two directors recognised their differences and met to discuss them, but were unable to bridge their views and link the two programmes. After a few years Ab pragmatically reduced his efforts to bridge the gap and focused instead on the practice programme. Eventually, researchers and practitioners formed two largely independent, and independently successful, networks. The research programme generated over 1,000 scientific articles and dozens of dissertations. The practice programme connected thousands of practitioners in the field, who worked together in hundreds of projects and created a wide range of new practices and spatial solutions. Although both programmes were successful in their own terms, the divide between them proved too difficult and only incidentally did the two benefit from being part of the same initiative.

Even with limited interest from his academic counterpart, Ab continued to focus the practice programme on convening as an approach to innovation. The communities of practice model allowed stakeholders to convene around specific topics, projects, and cases in urban and rural planning. By opening up new spaces between practices, organizations, and project phases the approach substantially increased the room for experimentation. Rather than passing through a series of prescribed steps, participants were able to move back and forth seamlessly between

Typical Habiforum project 3: Gardens for the creative economy

A third example was a series of “experimental gardens” for the creative economy. Stimulating local creative economies requires activities in domains like design, media, communication, education, and the arts crucial for new entrepreneurial ideas. Yet these “cultural entrepreneurs” often lack an environment that provides both space and a community of like-minded people. At the same time old factory buildings are decaying right in the centre of many cities. An experienced consultant and former alderman of the city of Amsterdam acted as a convener and facilitator for a group of local initiatives from eight Dutch cities to explore how to restore old factory buildings into dedicated spaces for housing local creative economies. The group’s goal was to shift from the dominant discourse of redevelopment into offices and condominiums toward a discourse highlighting the value of cultural activities and local entrepreneurship. They started to learn together by organising workshops in which each initiative was explored by the group and, if deemed necessary, specific experts. The shared purpose was to breathe new life into those old factory buildings and find support and capital from local governments, entrepreneurs, and project developers. In all participating cities old factories have been turned into creative centers that are home to designers and artists of all kind, theatre groups, social entrepreneurs and small shops. Initiatives often conflicted with the agenda of local politicians who preferred a blueprint approach and masterplans instead of the emerging approach advocated in the project. The network has enriched and accelerated these local initiatives, many of which would otherwise not have been realised at all.

different phases of the development process. The model offered a stimulating context to experiment with a diverse range of approaches where people developed a sense of accountability to new perspectives and where they could openly share insights and outcomes to make sense of their experiences across cases. The ‘Gardens for the creative economy’ illustrates this mix of experimentation and shared reflection across project phases (see box 3).

Coming right after publication of the report *‘The Netherlands is full’*, Habiforum’s approach to the use of limited space was timely. Such an offer to all stakeholders to participate in shaping the domain would never have come from the Ministry. This was certainly the case for private parties like engineering companies and project developers who had always been approached suspiciously. The idea of communities in which people share their respective practices, interact, and create new knowledge was novel in the field of spatial planning and even the Netherlands at large. Instead of ‘scientific knowledge’ that had to be translated into practice, it introduced a new perspective on knowledge creation as a living process involving multiple perspectives. Essentially for the first time practitioners were offered the opportunity to join in the conversation as equal partners at an early stage with a minimum of formal restrictions.

Habiforum soon attracted practitioners from all over the field of spatial planning for whom the work now resonated with their own goals. Their interest went far beyond Habiforum’s expectations. From the start Ab was amazed by their willingness to invest time and effort in projects that were often quite open-ended. They welcomed what they considered a rare opportunity to develop new ways of working in close cooperation with other stakeholders beyond

the often-strict boundaries of their organisations. Contributing to the design of new solutions proved to be a lot more stimulating than having to work with predetermined formats largely dictated by government agencies. Over the years, hundreds of professionals initiated projects to convene practitioners from different background, disciplines, and practices to learn together. These projects ranged from focused efforts consisting of a small number of reflection sessions to extensive programs spread out over several years. Many displayed a spirit of pioneering and exploring new grounds. The new paradigm of ‘area development’ as well as many of the tools and methods introduced and developed by Habiforum have become common in the field of spatial planning. While Habiforum formally ended in 2009, the rich trove of experiments, practices, insights, and experiences it produced are still very much alive. The website that covers all the methods and insights is still widely visited today.

Key convening practices

Given the focus on customized solutions and the diversity of cases, approaches, and personalities involved in projects over the years, it is hard to describe the Habiforum approach in general. Systems convening does not follow clear step-by-step plans that can easily be copied by others. Various conveners in Habiforum have their own styles and ways of forging learning partnerships and their art includes tacit skills and intuitions that even they cannot explain fully. Yet, one can discern several key convening practices common across the various projects.

Inviting an “enterprising group” of stakeholders

The first key practice is that of ensuring that the right configuration of people is invited, even if they have never been in the same conversation before. Conveners need to be very knowledgeable about the problem situation to appreciate both the technical challenges and the diversity of actors, ambitions, and interests. They excel in connecting the personal drive of people and ensure that all key stakeholders are included—whether they have a stake in the challenge or can contribute to resolving it. If required, conveners also invite outside experts who can offer their views on the situation and enrich proposed ideas. The strength of the conveners’ invitation comes from their reputation in the field and the vivid way they can summarise the essence of the problem situation in a few intriguing questions or phrases that communicate both urgency and inspiration. In most cases they stand right in the middle of the landscape rather than outside of it. Opening up opportunities to contribute to the setting of the goal and approach turns out to be crucial. One of the early projects failed from the start when invited stakeholders were confronted with a complete design/solution created by an architect, which meant that there was only a marginal role left for them to contribute.

It is crucial to have the “whole system” present, but the point is not merely to get everybody in the room, have them talk shop, and avoid chaos. Conveners aim for an “enterprising group” of people whose circumstances and priorities enable them to take risk and responsibility in dealing with the problem in new ways. A good example is the drive of the citizen group in the case of the old railway workshop (see box 4). Conveners also make clear from the start that coming only to “take” is not acceptable and that bringing something to the table is a condition for joining. Habiforum facilitators will not hesitate to look for substitutes to replace individuals whose other commitments mean they cannot participate actively in the enterprising spirit of the group.

Typical Habiforum project 4:

The old railway workshop

Another spatial challenge was to find a new purpose for an old carriage-repair depot belonging to the Dutch National Railways. Stuck between a residential district and the city centre, the collection of buildings had turned into a twilight zone only a few years after it had become obsolete. But when demolition became imminent, a small group of local residents recognised the potential beauty of this unique industrial inheritance. At the start of the project, the owner of the buildings and grounds did not see their potential and the local government had nothing to say about the area. Local residents lacked a formal position, but they managed to put the project on top of the local political agenda. While they were able to get official status for the buildings as a monument, real progress only came when a professional facilitator became involved to help the group take their initiative to the next level. They invited other stakeholders, including the local government, a range of not-for-profit organisations, entrepreneurs, and the Dutch National Railways to a meeting. Together they started to imagine new uses for the old depot and the surrounding areas, and the noncommittal attitude of stakeholders morphed into strong personal relations and active involvement. All acknowledged that the development of the area was both too important and too complex to leave to a single party. The collective learning that took place from the interactions of these different perspectives led to the discovery of all kinds of new purposes for the depot. Many buildings have been restored and put into new use, often by a company or organisation working in the cultural or artistic domain. The terrain now includes a theatre for festivities and conferences as well as office buildings hosting architects, designers, and event organizers. A master plan for the entire area describes how it will be developed further in the coming years. Due to its vicinity to the station, the area is now praised for its regional and even national potential.

Such enterprising groups do not gather merely to pursue their individual interests or negotiate compromises. These professionals from different communities must be ready to interweave their practices, perspectives, and competences to explore possibilities and take action as a group. This entails a responsibility to engage seriously across boundaries without knowing future outcomes beforehand, and to build on each other's practices to develop new practices as a group. It requires a sense of accountability to a new configuration of actors involved in (re-)thinking of the solution.

Building trust and openness by making power discussable

The difficult situations typical of Habiforum projects require exploring, probing, experimenting, and learning with an open attitude. Yet, stakeholders are likely to have known of each other for years; they often find themselves stuck in a deadlock state. A key role of conveners is to break such deadlocks by creating a new, open atmosphere that allows stakeholders to interact in a constructive way. The "political" nature of this work has both external and internal dimensions.

Externally, conveners strive simultaneously to buffer the new initiative from mainstream politics while trying at the same time to get ample political support for it. In the case of the Overdiepse Polder 'power' was seized by seeking publicity or calling upon a former minister. The case of the

old railway workshop shows how personal this process can become (see box 4). A powerful local politician, who was a strong supporter of the project, was frequently mobilised to give new impetus to the process. Indeed Ab notes the importance of finding a politician who is personally moved to make something happen politically. This work is ongoing as the political scenario evolves and people move in and out of positions of power.

Internally, facilitators strive to create “power-full” learning spaces, in which key actors and stakeholders can freely confront their various interests, ambitions, conflicts, and potential alignment. For instance, in the ‘creative economy’ project (see box 3), the interests of all stakeholders were articulated and put openly on the table. The Habiforum facilitators make an important distinction between “power-full” spaces and “power-free” ones. An atmosphere of trust is often associated with the idea of a more comfortable power-free space. A power-free space may enable progress faster during the early stages but cause the project to lose steam when ideas have to be put into practice. In a “power-full” space, trust develops from the expressibility of what is going on: articulating issues of power and making them discussable. These issues are recognized as an inherent aspect of boundary engagement. Discussing them openly provides an opportunity for stakeholders to get to know each other at a personal level. Formal power has to be discussable in the process of reaching and mobilising personal drives and energy underneath. Once people engage with each other on a personal level, they find it easier to see boundaries as institutional artifacts they need to deal with together. This can only happen when the process is open-ended, when learning can freely drive that process, and when the outcome is not pre-determined. Solutions can then be found, which were ‘unreachable’ before.

Creating commitment by mobilizing around ambitious goals

A fundamental principle of the new paradigm of area development is to deliberately strive for planning solutions of the highest overall quality rather than a compromise that satisfies the lowest common denominator. Such solutions strive to enhance the area without losing existing characteristics that are valued. As it turns out this principle is also a key convening practice: people will identify with an ambitious aspirational narrative—referred to within Habiforum as ‘a dot on the horizon’. In practice, Habiforum conveners challenge the group to formulate and commit to extraordinary goals. They make sure that such high objectives are directly related to the area under development rather than reflecting the interests of specific parties. First they invite group members to tap into their individual passion, to express and share their dreams. Then they shepherd them through the process of consolidating their aspirations into a highly ambitious vision for the area. Facilitation is needed because participants find it difficult to transform the multitude of individual perspectives and intentions surrounding complex spatial-planning problems into a shared, ambitious vision that pushes everyone forward. Habiforum conveners are encouraged to help the group structure their conversation with plain but constructive ‘how-can-we’ questions. These types of questions spur the imagination while inviting stakeholders to incorporate others’ interests into their creative thinking.

Committing to a highly ambitious collective vision rather than settling for a compromise takes time and effort, but it is necessary to get the buy-in of diverse stakeholders with competing priorities. It makes actors willing to engage seriously across boundaries and put their individual interests on hold for the time being. It signals the transition from a partial, discipline-based method to an integrated area-based approach. It is also critical later in motivating the group to keep on going

when things get tough. This construction of a high aspirational narrative has to be inclusive, allowing participants to express and engage their identities in the development of the shared vision. It only ends when all individual group members have had their say and commit themselves personally to the endeavor.

Working together: everybody can be an initiator

Once a shared and ambitious objective has been articulated, conveners shift to the goal of working together to generate the best possible solutions. This involves sharing insights and experiences and freely exploring alternatives. It also involves experimenting with new solution and initiating concrete transitions in the situation – developing entirely new ‘genres’ of practices when required. A key principle at this stage is that “everybody can be an initiator.” This means that proposals for action steps can come from anyone, independently of function or status. By reifying power and boundaries and shielding the process from undue domination by traditional paradigms and players, Habiforum creates an open space in which all participants are equally invited to contribute to solutions. This principle has brought unknown professionals into leadership positions. For instance, farmers took leadership in re-imagining possibilities for the Overdiepse. Similarly, ‘ordinary’ local residents drove the transformation of the old railway workshop. When people clearly saw that truly new practices were required and welcomed, they responded by becoming initiators no matter their status or position.

This stage often turns out to be the real test for a group. It indicates which additional efforts a convener needs to make and whether to invite others to join. Once it works, the convening role changes. Some become more of a facilitator; others start to function as a normal group member; and others even leave the scene entirely.

These convening practices have a logical flow, but they are not strictly sequential. Conveners often move back and forth between them or apply them simultaneously. For example, the design of a solutions or the launch of a pilot initiative may bring new insights into the situation or attract others who offer their help.

The role of conveners

There is no denying that the key ingredient in the success of Habiforum is the central role that conveners played, through their work, their personality, their skills, and their persistence. As director of the practice programme Ab acted as a kind of “master” convener: much of his role consisted in inspiring others to act as conveners too. With no practical experience in the field of professional learning strategies Ab had few opinions or preconceived ideas on what could and could not work. Nor did he feel any urge to develop any approach himself.

“I don’t consider myself an innovator but more a ‘signaler’ who has a very good feel for ‘what’s in the air’.”

His experience in a government agency gave him some legitimacy, but he was not representing any organization or perspective.

Ab now reflects that he kept too much distance and did not challenge others enough to make a difference beyond their projects. As a result too many people ‘just did their own thing’ without really committing themselves to a wider vision. Still his attitude drove him to invite practitioners from many different backgrounds and disciplines to leverage their expertise, reputation, or position. They were able to take the lead in convening others who could contribute innovative solutions to difficult challenges using a wide range of approaches. He promoted the concept of community of practice as a mode of convening that encouraged action-learning, collaboration, and experimentation across formal organizational and professional structures. Time and again he met with practitioners in the field to inspire them about the challenges Habiforum would be working on and the convening approach it had adopted. In addition to inviting practitioners, Ab also convinced many decision-makers to join Habiforum or get involved in one of its projects. He did not hesitate to leverage his position as a source of funding to push people to adopt a “convening” attitude, for instance, when he invited applicants to put in joint proposals as a consortium. Although a number of these consortia hardly made it through their first project, others developed into fruitful and long-lasting collaborations.

At a later stage, Ab convened a select group of Habiforum facilitators to explore the role of convener with them. He invested a lot of effort in connecting them and creating learning opportunities for them. At first he tried to form a community of practice among them, called the MetaCoP to capture lessons across all projects. For a variety of reasons it did not work out. MetaCoP meetings were largely used to arrange practical things, report on progress of projects, and rarely got beyond that stage. The facilitators’ exclusive focus on their own projects turned out to be an obstacle to combining insights and generating collective knowledge. As a result the meetings remained oriented to individual projects rather than developing a shared practice. After the MetaCoP came to an end, Ab initiated a series of focused meetings around specific topics.

Although the conversation among facilitators about their mutual experiences improved, the linkages across the group as a whole remained rather weak. The diversity of practitioners, approaches, and projects in Habiforum also had its downsides: the ample opportunities to experiment typical of Habiforum’s way of working hindered the integration of outcomes. Building bridges across projects to link practitioners and experiments turned out to be one of the main challenges until the end of the programme. Ab now regards this lack of connection between projects as the main flaw in Habiforum. It is something to which he should have paid a lot more attention and about which he should have been more directive:

‘We have established too few links between different experiments and practices, let alone between practitioners and the academic network. Experiments may have been too loosely connected and did not build upon each other. We should have challenged the associates more to do so’.

A combination of intention, intuition, and openness seems to have been a key ingredient in getting the program underway and sustaining it for ten years. As is typical for systems conveners there was always a lot of pressure from sponsoring governments and decision-makers who were looking for quick answers to the problems they faced. In spite of such pressure, Ab kept an open attitude throughout the project, refusing to settle for easy, but unsatisfactory certainties. This seems to have played a crucial role in his success as a convener and his ability to inspire Habiforum’s associates.

‘To be honest, I did not have any clear ideas on where we had to go with the programme. All I knew was that current approaches failed to deal with the challenges we had in front of us and that we urgently needed to develop new ways of working in spatial planning. I was only aware that learning together was important but had no clue what the new practices we needed had to look like. And to be honest, that remained the case for many years.’

The experience of Habiforum has had a profound effect on all who were involved, and on Ab most of all. Now he has co-initiated a new project, *Netherlands Above Water*, using the lessons of Habiforum to create coalitions and new practices in participative water management. It hard to tell if being a convener is an irrepressible personal trait or a kind of addictive, adrenaline-inducing contact sport!

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Chapter 9

The IDEA Partnership: convening learning partnerships in the complex landscape of special education

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Thirty-five years after a law was passed by the US Congress requiring states to provide adequate education to people with disabilities there are still wide gaps in the kinds of services offered to students with special educational needs. This chapter describes our efforts to convene learning partnerships among the different stakeholders involved. It is our belief that their coming together is essential for creating lasting change in the physical, academic, and social lives of all students.

The chapter begins with some background to the legislation and a description of the project that was funded to support implementation of this law. We then outline the challenges we faced in this project in terms of the complexity of the landscape of practice. Indeed to form new learning partnerships in the service of people with disabilities, we are bringing together diverse stakeholders working in different sectors and at different levels of scale. To illustrate how the project operates we relate the three-part story of a community of practice realized at the federal, state, and local levels. Finally we use these stories to reflect on our approach to convening in complex landscapes and draw out what we are learning from the experience.

The IDEA Partnership

In the mid-seventies, the United States Congress passed a piece of legislation called the *Individuals with Disabilities Education Act* (IDEA). This act requires states to provide “free, appropriate, public education” to all individuals with disabilities. The legislation was a landmark at the time, and states have made great strides toward the law’s goal of offering all students an appropriate educational program. Yet more than three decades after the enactment of the legislation, persistent academic and behavioral challenges remain. To fulfill the intent of the law, groups across the landscape must come together to make progress in changing practices around the physical, academic, and social needs of all students. For those who administer, implement, and are affected by the provisions of the IDEA a shift toward more collaboration across systems is critical.

It was to this end that the *IDEA Partnership*¹⁹ was formed. The IDEA Partnership is a long-term project funded at the federal level to support implementation of the law through a process of accelerated learning across relevant stakeholder groups,²⁰ a strategy that is instrumental for achieving real change in practice.

As systems conveners for the Partnership, we bring together individuals with disabilities, their families, educators, and service providers to work as partners with researchers, decision-makers, and technical assistance providers. The mission of the IDEA Partnership is threefold:

- Demonstrate the value of broad stakeholder engagement in influencing changes in practice
- Use the networks that already exist in national organizations to build stakeholder engagement at national, state, and local levels
- Bridge the boundaries that separate those who should be working together to achieve real inclusion for individuals with disabilities

A landscape with multiple dimensions of complexity

The goal of providing adequate educational opportunities to all individuals with disabilities involves a great variety of practices on different sides of traditional boundaries. The IDEA Partnership works with over 50 national organizations, including groups that represent policymakers, administrators, practitioners, families, and youth.²¹ We bring these groups into a working relationship with state agencies and local schools.

The complexity of this landscape reflects the following dimensions:

Multiple levels of scale

For our work to have real impact, learning needs to take place at multiple levels of scale at once. IDEA is a federal mandate with policies at the national level. Education in the US is the responsibility of each state: it is managed by education departments at the state level, administered by local school districts, and delivered in each school. The challenge is to enable learning at each level and to connect the different levels into meaningful learning partnerships. For instance, states can learn from each other's experience in implementing the federal mandate. Different agencies within state governments can learn to coordinate their work to serve the same children. Policymakers need to understand the effect of their policies on practice and on students. Conversely practitioners and parents need opportunities to understand the intention behind the policies that affect them. In convening learning partnerships, we work across different levels of

¹⁹ For ease of reading in this chapter we will use capitalized Partnership to refer to the IDEA Partnership and lowercase partnership for the general term.

²⁰ More specifically, the IDEA Partnership is a project funded by the Office of Special Education Programs (OSEP). It is one of a number of targeted investments designed to deliver information and support implementation of the law by advancing the use of research and evidence-based practice. Yet, the Partnership has a unique purpose: it is specifically funded to build connections between federal investments, national organizations, and state education agencies. Our work focuses on the human aspects that can impact the spread and use of the evidence-based practices dominating federally sponsored technical assistance programs. To date, our work has been funded for 15 years through successive investments that are five years in duration. With each funding cycle, the learning, the relationships, and the outcomes have reshaped the continuing investment.

²¹ Collectively, the 50+ Partnership organizations reach over 7 million stakeholders.

scale to include federal and state agencies, local districts, site leaders, practitioners, families, and youth.

Multiple domains

Learning needs to take place in a large number of potentially relevant domains. We have focused on several key domains, including transition from school to college and career; integration of school-based and community-based behavioral health; and the academic and behavioral barriers to achievement. For each domain, different groups have specific sets of related issues they care about. Domains are chosen because they cut across the system and offer unique opportunities to form new learning partnerships and build broad commitment to transform practice.

Multiple sources of knowledge

We find that people look to trusted sources for information and guidance. Both formal and informal sources exist. Formal sources use policy statements and an evidence base grounded in research, while informal sources derive knowledge from practice. While these can reflect differences in power, both are important components of knowledgeability. We believe the success of our partnerships depends on recognizing the role that each can play in moving collective learning forward.

Multiple sources of authority

Because IDEA entails legal requirements, individuals look to recognized sources of authority for setting the directions and boundaries for action. In a federal system of education, certain provisions are required for all by federal law, but states can add additional provisions. In turn, districts can move beyond state regulation in creating their own local policies. Relevant sources of authority exist at each level of scale. For important issues of practice, the right level of scale is not always apparent and progress usually depends on leveraging sources of authority at multiple levels.

Multiple sources of influence

While authority is important in shaping behavior, people also respond to their own insights and the insights of trusted colleagues in making their decisions about how to behave. In our learning partnerships, influential groups include professional associations in general education as well as in special education, family advocates, and youth leaders. Influential groups often have national organizations as well as local chapters.

Multiple stakeholders

Education involves a wide array of participants and stakeholders. Some, like state agencies, have authority through policy and monitoring. Others, such as professional associations and advocacy groups, have influence through their deep and durable networks of members. Many others affect outcomes through direct engagement with students. Involving all types of stakeholders in a learning partnership is key to achieving sustainable changes in practice.

All these dimensions of complexity intersect in our efforts to engage all the relevant partners around critical issues.

Communities of practice at multiple levels of scale

Our convening strategy has been to start by cultivating communities of practice for a few key domains. These communities are broad and long-lived enough to call on people's identities and serve as a context for the various learning partnerships and focused activities we facilitate. One of the most important and enduring example of such a community convened by the IDEA Partnership is the National Community of Practice on School Behavioral Health.

Behavioral health is an issue that concerns individuals across systems and from an array of disciplines. The domain focuses on emotional support for youth in school and in their community. Over time, a flurry of initiatives have sprung up to address this issue, led by education, health, mental health, and family groups. Each initiative has its own brand, targeted leverage points, set of supporters, and unique vocabulary. Some are based in schools and some in the community, but they often serve the same populations. Few crosswalks exist to connect related initiatives, although many are complementary and some are completely aligned.

Complex and multi-scale, this collaboration between different stakeholders in the area of behavioral health has challenged our ability to convene and facilitate and continues to energize us today. Their story is a good illustration of the kind of convening we try to do.

We tell this story in three parts showing how the collaboration has manifested itself at the national, state, and local levels. The first story is about the *national* community of practice on school behavioral health. The next two focus on Hawaii and Pennsylvania, two of several states involved in the national community that went on to form similar communities of practice at the *state* level. In the Pennsylvania case, we highlight the example of a school district that brought together public and private partners to work on behavioral health issues at a *local* level.

Launching the national community of practice on school behavioral health

The community of practice on school behavioral health has its roots in the *Shared Agenda* (Policymaker Partnership 2002), an initiative that was co-sponsored in 2001 by the National Association of Mental health Program Directors and the National Association of State Directors of Special Education. Through the IDEA Partnership fifty stakeholders representing national, state, local and individual interests were brought together to explore potential collaboration across the school-community divide.

Then in 2004 one hundred stakeholders were brought together by the IDEA Partnership and the national Center for School Mental Health to build on the cross-boundary relationships defined in the Shared Agenda. To help facilitate the dialog, trigger people's imagination, and align the perspectives of different stakeholders, the meeting was structured by four key questions we have devised as a framework for bringing people together:

- Who cares about this issue and why?
- What work is underway separately to address this issue?
- What productive endeavor would unite us in doing real work?
- How we can build the connections?

The discussions that ensued were lively and diverse. They helped surface a context for ongoing engagement to address common challenges, involve potential partners, seek a shared language, and align major funding streams. The joint commitment from this meeting gave birth to the National Community of Practice on School Behavioral Health.

Since then the national community has grown to include sixteen states with cross-agency teams, twenty-one national organizations, and eleven federally funded technical assistance centers. They meet annually in person and monthly by teleconference to define priority issues that can make a national impact. The community has spawned twelve “practice groups” focused on specific issues such as the connections between school-wide positive behavioral interventions and mental health; mental health and the transition from school to post-school; and behavioral health from cradle to college and career. Several states in the national community have been showcased by federal agencies as exemplars of cross-agency work.

The community’s annual conference attracts over 1,000 people. It is organized by the practice groups, which sponsor learning activities focused on a priority issue. They distribute the request for proposals, receive the submissions, rate the proposed sessions, and hold conference calls

with the selected presenters. Practice group facilitators invite new members to breakfast and lunch session to explain the work of the group. With each successive conference, membership in the practice groups has grown as meeting attendees become community members. During the annual meeting, held in conjunction with the conference, the national community and each practice group set a work scope and place their activities on a shared calendar. The calendar makes the breadth of the community’s work transparent, invites participation, sets critical timing and provides an opportunity for practice groups to learn about and participate in each other’s work. This has become a way to continuously explore issues and perspectives within the landscape of behavioral health.

“I have been able to use this venue to participate in developing a family-driven definition of family engagement in response to an outside request [from a national committee]. As an occupational therapist, this community of practice even connected me to others in my discipline who were also working on how we contribute to school mental health.”

-- a local practitioner, active member of her professional organization and the national community.

Building a state community of practice in Hawaii

The national community has spawned communities at the state level. For more than a decade, policymakers in Hawaii had been pursuing the integration of education and mental health services to improve the wellbeing and achievement of children and youth. Much of the interest in working across state agencies was driven by litigation and the resulting federal court order that required, among many things, extensive examination and monitoring by federal agencies.

By the spring of 2005, it appeared that, after years of intervention, Hawaii was ready to steer its own system. The last federal monitoring report stated that the infrastructure was in place to deliver a system of school-based behavioral health alternatives and that measurable progress toward goals would continue. To the leadership of the Hawaii Office of Special Education, it was clear that this high standard was not likely to be achieved through monitoring alone. Monitoring

was a valuable technical process, but stopped short of addressing the dynamic relationships that undergird the system. Learning partnerships within a community of practice offered a way for state agencies to engage local service providers and connect with the families and youth who were the intended beneficiaries.

Later that year, modeling the strategies promoted by the national community, the state Department of Education convened a meeting with other agencies and 50 diverse stakeholders to formalize partnerships in a statewide community of practice. State agency personnel wanted to create a working relationship among decision-makers, practitioners, and consumers. In this way, they could test their assumptions, create and evaluate pilot efforts, gain insights that could inform policy choices, and drive a strategy built on a shared vision.

“We look to experts for guidance, but we must believe that the answers to our problems lie with us. What we know, what we learn, and what we choose to do.”

-- a state CoP leader
in Hawaii

Today, the partnerships within the Hawaiian community of practice continue to flourish. Each island has established a local community and their representatives meet to strengthen the state community of practice through a number of learning partnerships that address cross-island issues.

“Adults can change, but we have to help them.”

-- a local youth leader at
Honoka’a High School in the
North Hawaii CoP

Community councils, formed through the Department of Education, have become the backbone of the community of practice structure. Each island has its own priorities, and a leadership team works across islands to encourage stakeholder work on the issues they have identified as a priority.

Several local communities of practice have launched initiatives that have a broader impact. On the island of Oahu, for example, the community of practice worked with Families as Allies to launch campaigns to foster resiliency. The campaign, *‘Make a Friend-Be a Friend’*, won a national award for family leadership. On the Big Island, North Hawaii youth inspired people at a national conference with a presentation of their student-to-student program, *“Ka’euepna (The Net)”*, designed to help vulnerable students transition to high school and grow as youth advocates.

Leadership of the state community of practice continually model cross-boundary learning partnerships by aligning their support for work across departments. In 2012, 500 participants joined in a *Summit* sponsored by the Departments of Education and Health to pursue the future of behavioral health in Hawaii.

Working across public and private partners in Pennsylvania

Like many of the state teams in the national community of practice on behavioral health, Pennsylvania was interested in bridging the gap between school-based behavior support services and individual interventions delivered by community-based mental health professionals for individuals with significant behavior problems. At the time an evidence-based program, *Positive Behavioral Interventions and Supports (PBIS)* was being promoted in schools nationwide. The national community of practice agreed that local implementation of PBIS could significantly reduce the number of behavior issues in schools and create a more positive school climate for all

students, but especially students with emotional disabilities. Through the state community of practice, the Pennsylvania Departments of Education and Public Welfare, along with a number of private partners, pooled resources and in-kind services to staff and implement PBIS.

While the primary work of the community of practice focused on implementing school-wide PBIS, some of the partners wondered if higher intensity needs might also be addressed through the collaboration of school and community partners. As a result, several demonstration projects were installed throughout the state.

One of the demonstration sites was the Scranton School District. In Scranton, as in many localities, education and mental health entities had loose connections but did not deeply integrate their missions, goals, and strategies. Inspired by the school/community partnerships established through the state community of practice, Scranton increasingly aligned their community services with school-wide efforts. The managed care provider serving the Scranton area realized the value of working on both prevention and intervention in schools with significant needs. Several community mental health workers were assigned full-time to the schools. Together with school leadership and staff they built a comprehensive program of school service and home/community carryover. Services that were once delivered in separate and discrete models are now planned and supported through joint initiatives encouraged by the state community of practice and managed by local agencies, private providers, and the school district.

Another district, Pocono Mountain, strategized about how to increase local capacity to address the needs of students that were being served in settings outside the school district. By working with the state community of practice and collaboratively across school staff and local providers, they were able to build the skills necessary to serve students in the district. Funded by the Department of Special Education the state community of practice initiated a 'return on investment' (ROI) study and determined that the district built new capacity while saving over \$135,000.

Statewide, among the schools partnering in the PBIS effort out of school suspension days were reduced by 35.2% in the first two years. Academic achievement rates for school sites implementing the framework with fidelity increased at a rate higher than the state average. By the 2011-12 school year, more than 300 schools and 50 early childhood centers were served without a dedicated funding stream from any agency. Today, over 400 schools participate in the PBIS work managed by the twenty-seven public and private partners in the community of practice. The strong connection between local partnerships and Pennsylvania's state community of practice increases the likelihood that policy discussions held in state agencies will reflect the realities of local practice. Likewise, Pennsylvania's participation in the national community of practice ensures that practice advancements are communicated to states, national organizations, and federal agencies with similar challenges and a shared commitment to behavioral health.

Convening as an approach to learning

The goal of the IDEA Partnership is to accelerate learning by forming new partnerships across the landscape and addressing shared challenges together. Our efforts are guided by a few basic principles we believe can bring about sustainable change in practice:

- Individuals at all levels are more open to information and influence from groups with which they voluntarily affiliate.
- Through structured interaction to work on concrete issues, individuals can discover shared interests that go beyond their different roles and organizational positions.
- Real change in practice requires learning partnerships that include decision-makers who are responsible for policies and programs as well as individuals who both implement and are served by those programs.

Learning through shared work

The initial barriers are significant. Potential partners have successfully operated in their current structure for years. There is something to be gained but also something at risk for most potential partners. Professional organizations have long histories of leadership on specific issues; state agencies have a mandate to implement; and advocacy groups have a passion for the “consumer” perspective. Often there is a history of mistrust or blame among them. Yet, the appeal of broader support, easier access to information, and recognition as an important contributor all pique their interest. The right mix of people and strategies, with some early gains, is essential to keep their interest and catalyze further participation.

Our basic approach is to engage partners in doing actual work together, for instance understanding the implications of a piece of legislation or crafting a response to a policy. Usually, this is work they would have to do anyway to pursue the agenda of their own organizations, but which they can do better together. The goal is not to replace individual agendas with new ones, but to explore the commonalities across agendas. This shared work is a way to achieve some early progress that has immediate value for the new partners. It also provides the infrastructure for building relationships that are likely to create value in the future.

“I saw [the Partnership] begin with nothing but just a few ideas and I really saw it transform the way people interact with each other. I saw it bring respect for the various organizations [and their positions] from organizations that probably did not respect each other to start with. And I saw it reduce some of the fear that you saw among professional organizations toward the parent organizations. Those things are still worth doing, very much so.”

-- a national leader

Complex landscape, simple questions

We have developed a simple strategy for finding a workable entry point into the complexity of the landscape and get the buy-in of diverse stakeholders. Given an issue we need to address, we begin by identifying potential partners in the landscape and then articulate the issue as expressed by those partners. This process is structured by the four simple questions mentioned earlier in the story:

- Who cares about this issue and why?
- What work is underway separately to address this issue?
- What productive endeavor would unite us in doing real work together?
- How we can build the connections?

These questions help to surface the context for facilitating interactions: common issues, potential partners, boundaries, differences in vocabulary to express common themes, as well as areas for shared work, common messages, venues for joint communications, and opportunities for aligning major funding streams. Potential partners have diverse but important contributions to make. Convening them for exchange, joint exploration, and shared work becomes the key strategy.

Communities of practice as an infrastructure for collaborative learning

School behavioral health is one example of a successful and enduring community of practice, but the Partnership facilitates a constellation of interconnected communities, each with state-level communities and national practice groups. We facilitate these communities very intentionally through annual meetings, regular community calls, activities and projects sponsored by practice groups, state-to-state sharing, and a customized website that supports online collaboration (www.sharedwork.org).

When states and organizations are joined in such a sustained community, we find that the identification that develops over time supports the spread of successful strategies and the creation of new knowledge. A national community invites the development of state communities, which likewise invite the development of local ones. At the local level, people closest to the work join with each other and connect with the state community to learn what will advance and constrain changes in practice. In this way, state agencies develop more enlightened policy and guidance grounded in the realities of practice. Conversely, stakeholders develop a deeper understanding of the driving forces behind state policy choices. The gap between ‘knowing’ and ‘doing’ (Pfeiffer and Sutton, 2000) starts to close as issues are pursued in active and collective ways. Information, tools, and innovation are transferred from colleague to colleague faster and with relevance. Documents from research, policy, and practice gain meaning as they are discussed and translated into practice by community members. Last but not least, such productive experiences of social learning progressively change how people behave in the Partnership and beyond.

New habits of interaction, new identities

Trust is critical for crossing enduring boundaries of practice, affiliation, agencies, roles, and perspectives; but it is a process that takes time and persistence. We find that trust develops in a learning partnership when it has been reinforced over time - on a range of issues - and when relationships have been useful in negotiating a variety of challenges. The trust that develops over time through such shared work becomes a foundation for crossing real and imagined boundaries.

One of our goals is to help people discover the value of this type of deep collaborative learning. This requires them to practice new “habits of interaction.” Over the years, we have developed a framework to foster these habits. Its four components form the basis for our work and, together with the infrastructure we create, define our approach to convening learning partnerships in landscapes of practice:²²

Coalescing around issues – Grounded in the range of perspectives, we encourage the search for shared concerns, asking: What will bring people together? Where do the multiple perspectives on this issue begin to diverge? Where is there potential for alignment? How can we leverage the information/activity that already exists? How will we frame this issue for shared work?

Ensuring relevant participation – Challenging the habits of shallow collaboration, we encourage the partners to reach out and get the right mix of stakeholders, asking: Who must be involved to ensure changes in practice? What will ensure that decision makers, practitioners, and consumers have an active role? What tools and communication vehicles will support engagement?

Doing work together – We believe that engagement in shared work deepens relationships and convince people of the value of engaging beyond their comfort zone. We pose these questions: How will relationships and activities advance shared work and learning? What individual goals will be met through doing work together? What collective goals will be met through doing work together?

Leading by convening – With a focus on sharing leadership and leveraging the connections that each stakeholder brings, we encourage partners to reflect: Can individuals in all roles become leaders in learning? How can we translate complex challenges into ways that individuals can contribute? How can individuals support learning by acting as conveners within their own networks?

Figure 9.1 summarizes our approach to leading by convening. The middle row describes areas in which our partnerships promote collaboration: technical areas where challenges can be addressed with the right information or expert advice, adaptive areas, where challenges need human negotiation for accommodation to different situations, and operational areas where decision-making requires a mix of technical and adaptive approaches.²³ The bottom row describes progressive levels of depth of collaboration that our partners recognized in their interactions, from merely informing each other about their respective positions, to connecting with each other, to working together on joint challenges, and ultimately to transforming their respective practices.²⁴

²² As we struggled to put those habits into a framework that others might use, we turned to the foreword written by Etienne Wenger as an introduction to our manual for state agencies. His description of our efforts through the lens of his work in social learning allowed us to see and express the values we hold as we begin to convene groups and enable others to convene and facilitate groups of their own (Wenger in Cashman et al., 2007).

²³ The distinction between technical and adaptive challenges comes from the work of Heifetz and Linsky in their book, *Leadership on the Line*, (2002). The operational area was added by our partners.

²⁴ Our approach to leading by convening is further elaborated in a practical guide *Leading by Convening: A Blueprint for Authentic Engagement* (December 2013) available on line at www.ideapartnership.org

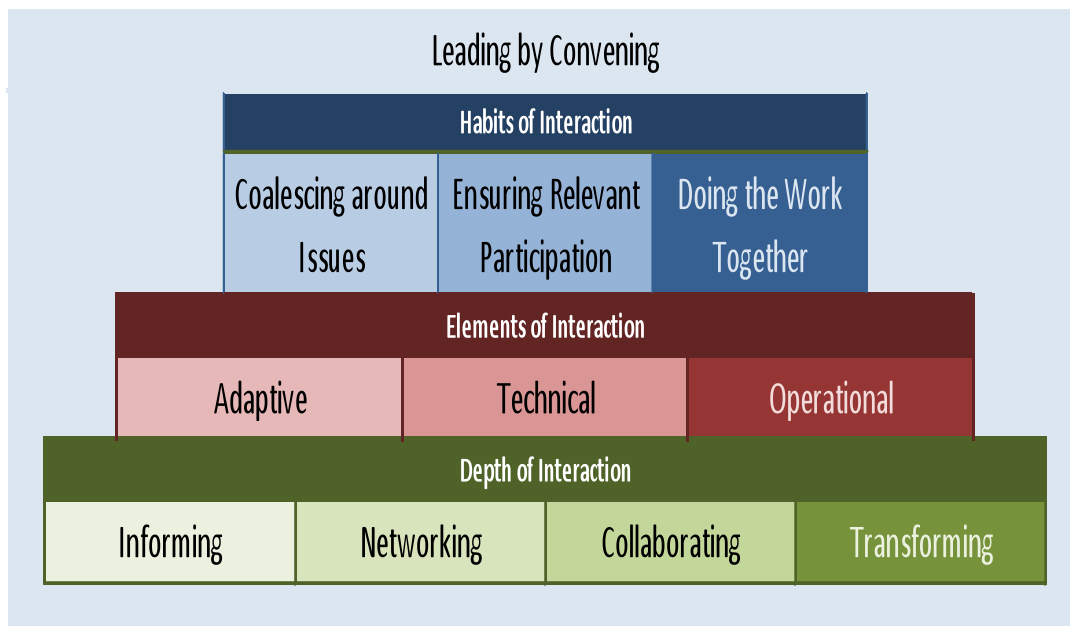


Figure 9.1 Dimensions of leading by convening.

It has been said that the difficult task is not acquiring a new habit but giving up the old one. In many ways this adage applies to agencies, organizations, and individuals as they enter learning partnerships. Our approach to sharing leadership on important issues is a significant departure from current practice, even for those who would describe themselves as collaborative or knowledgeable about the landscape.

Deep collaborations, boundary crossing, and trying to make a difference in the landscape as a whole require ‘identity’ work (Wenger 2007). To help our partners build their new identities as collaborators in the landscape, we need to continually provide learning opportunities that demonstrate the difference, help individuals to value deeper collaboration, and expand their knowledgeability of the landscape. As suggested in Chapter 7, proposing new identities involves all three modes of identification. People have to re-imagine themselves as connected to the whole

“The Partnership ...gave me hope to feel that I could really impact systems change as an individual who believes in systems change. They have given me the tools, the support and the mentoring to take my work to another level.”

-- a national partner

landscape. They have to learn to engage with others in new ways. And they have to realign their work so that it contributes to a broader vision of what is possible. When the three aspects combine, they progressively see themselves as actors in the landscape. Believing that one can initiate and sustain change is a key piece of making change possible. Complexity hinders opportunities to see and believe one can make a difference. Crossing the boundaries that separate people who do

related work gives them a new sense of their field of action. Such transformation of identity happens over time, but it ends up driving thought and behavior across situations. We have found that the repeated experience of deep collaboration transforms individuals and gradually changes the way they collaborate, not only in the context of our Partnership, but also in their own organizations and agencies.

This work is long-term. Our Partnership enjoys a foundation of relationships that have been built across more than 50 partners over 15 years. This foundation enables us to invite partners into a range of learning opportunities around difficult issues. With each invitation, the connections deepen, the coherence becomes clearer, habits of collaboration are reinforced, and people develop new identities oriented to the landscape.

Convening roles in a complex landscape of practice

Our experience through the IDEA Partnership has made us more aware of the variety of roles conveners must play. The following roles define the parameters in which we operate as conveners, using our knowledge of the partners and their contexts to create opportunities.

The sensing role: *Continuously identify the current organizational agendas and emerging interests that allow cross-stakeholder interaction.*

Facilitation of a complex venture like the IDEA Partnership requires the ability to sense potential connections by taking the perspective of relevant organizations and anticipating the forces that could drive and constrain collaboration. We find that it is an essential role for encouraging and facilitating open interchange among partners. Over time, partners appreciate the value of such sensing behavior: they begin to identify new partners and see how to invite them into the work.

The brokering role: *Facilitate interactions that build shared understanding across contexts.*

In a learning partnership, value does not come from the ability to collect and distribute information, but rather to make information personally meaningful. Many programs exist to collect and distribute information. The point is to leverage relationships and convene learning activities to help people select, organize, and make sense of information in ways that are relevant to their own contexts. In the Partnership, this brokering across boundaries takes place at two levels: bringing a wider group of partners into an existing activity and making strategic use of the networks that each partner has in place to create a multiplier effect.

The modeling role: *Consistently model cross-stakeholder work in all undertakings.*

The participatory approach we advance appears idealistic to some stakeholders. More straightforward strategies seem to offer more predictability and often have greater appeal. Therefore, every activity must demonstrate the concrete value added through cross-stakeholder work.

“In over 20 years of advocacy work, I have never felt more like a partner than when I am working through the CoP.”

-- a family advocate member of a state CoP leadership team

Every instance of Partnership collaboration is held to that standard: to challenge the common wisdom; to help people leave their old habits of episodic and shallow collaboration; and in particular to include as participants and leaders in the work under-represented groups, such as families, individuals with cultural and linguistic differences, and youth with disabilities. Consistent modeling is an effective strategy for change,

especially when coupled with a set of tools to plan, structure, and reflect on Partnership activities.

The coaching role: Support partners in practicing a more collaborative approach in their own networks.

The Partnership is committed to helping states and organizations value and meet a high standard for collaboration. We find that new connections and frequent participation in activities that yield results around high-value issues are critical to building a personal identity as a collaborator and learning partner. Therefore, we invest in activities that help partners build their ‘identity’ as collaborators. In many cases this means that we contribute to activities in their context, by supporting them, making connections, or even participating directly.

The designing role: Build the infrastructure for sustainable work through national and state-based communities of practice and electronic networking.

The types of broad and complex communities of practice we rely on as a context for facilitating learning partnerships do not develop without intentional cultivation. Most obviously, the increasing demand for guiding tools and technology infrastructure require us to take a designing role. But the design role is pervasive. Finding the right rhythm of interaction among the right partners is essential to advancing the work and building the relationships, and it requires careful planning. Even ensuring that all stakeholders have a sense of ownership and an opportunity to take leadership needs to be part of an intentional design, especially given the differences in power that characterize the landscape.

The reflecting role: Establish a data collection and evaluation system that documents activities, conditions for success, and impact.

While communities of practice are receiving significantly more attention as a strategy in education today, there are still many skeptics.²⁵ The approach is far less linear than traditional implementation designs. Therefore, we are under pressure to show impact and we have to balance the short-terms expectations of organizations with the long-term needs of the network. To answer this challenge, the Partnership has established an array of quantitative and qualitative metrics that help us document claims of value. The formative evaluation team including staff, evaluation contractors, and partner leaders collect and analyze the data in response to the formal measures requested by our funder. Case studies focus on value-creation

“I was really with a lot of people who were doing the same thing and some were ahead of me and helped me. There is an immediate acceptance of people who participate in the process. You’re made to feel as though you are part of the process and a significant contributing member.”

-- a partner from a national organization

²⁵ The situation has changed over the last few years. Many education reformers now believe that a ‘communities of practice’ approach is a promising strategy to address the persistent problem of bringing successful initiatives ‘to scale’ (U.S. Department of Education, 2009). With the heightened importance of sharing knowledge across organizational boundaries, the concept is now being applied by the federal government in many areas.

stories that account for the immediate, potential, and realized value the Partnership contributes (as defined in Wenger, Trayner, and deLaat, 2011). Value-creation stories encourage reflection and describe how participation has helped community members redefine their work and shape their future interactions. As systems conveners who manage an array of tasks, we find that reflection and evaluation must be built into our routine. Nothing short of an ongoing commitment to data collection, evaluation, and storytelling can demonstrate the impact of learning together. This is especially important for a long-term project where the context is shifting and new participants and sponsors need to be brought on board.

Each of these roles entails a number of specific behaviors. To some conveners they come naturally; others need more help. In the IDEA Partnership, we have been increasingly attentive to these behaviors: identifying them and creating simple tools such as question sets, discussion protocols, and guidebooks to enable others to grow as conveners. Tools help, but cannot replace, the credibility and personal relationships developed through common work.

Looking back and moving forward

In this chapter, we have mostly described how the Partnership operates and what we do to help it work. But social learning is not linear. Even well-planned and supported efforts struggle to achieve all that conveners envision. Such is the experience in our Partnership as well. While we describe exemplary efforts in some states, others struggle to maintain cohesion and deal with frequent changes in leadership. We are able to offer quotes from members who have found personal and professional value, but we know many more would engage if we could find the right mix of issues and activities to involve them. Even though we have been at it for many years and have made much headway, ours is still a work in progress. We continue to learn every day and through every new relationship. Some lessons do reappear often enough to be worth offering by way of conclusion:

- Looking for the multiple dimensions of an issue is critical to drawing in the right partners. Surely, learning partnerships demand focus, but the pressure to focus must not constrict our full examination. We risk an incomplete picture of the problem if we ignore the multiple perspectives that shape the work around an issue of concern. Often, we must translate concepts from the terminology of one discipline to another to help discover the commonalities. As described in Chapter 1, accountability and expressibility must be in balance. Conveners need to be able to sense differences and make it safe to express differences, all the while holding the group accountable to its aspirations.
- Learning partnerships that have the most value for widespread changes in practice cross levels of scale. Over time, multi-scale partnerships nurture the relationships that have been missing in bridging research and policy with practice. Of course, we can learn with peers at the same level of the system. Yet, the learning partnerships that have the most promising outcomes are ones that reflect the location of any practice in broader systems. In our domain, implementation has federal, state, and local components. When a learning partnership fosters potential leadership across levels of scale, the full set of perspectives yields more encompassing strategies and draws more widespread support.

- While we value the multi-scale aspects of learning partnerships, coherence and alignment across the domain is also important. Cross-walking agendas, examining longitudinal implications, and mapping current and emerging connections are key strategies that conveners must develop. To maintain legitimacy in a complex environment, conveners must think beyond their own funding streams and mandates. We often find ourselves helping people move beyond of the specificities of their own language to an underlying purpose.
- Of our early lessons, one stands as the most valuable: honor the work that has come before the current undertaking. Don't ask anyone to give up their own "framework". Instead, ask them to seek commonality and find value in both their own and the larger agenda.

For the IDEA Partnership, as with all conveners, the learning goes on. Our daily work is energized by the knowledge that we are part of a larger group of individuals who are simultaneously acting in these roles and willing to share the lessons learned in developing our own identities as collaborators and conveners.

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