WHAT Is a “Convening”?  

CONVENINGS ARE...  

Composed of diverse stakeholders who represent a range of perspectives on a topic, often from different Organizations  
For accomplishing a clear purpose (e.g., drive toward decision-making or alignment) and intended outcomes  
Designed to draw on all participants to generate insight and action beyond what any single actor could achieve on his or her own  

CONVENINGS ARE NOT...  

Regular, internal meetings  
Focused on administrative, process-related topics  
Solely for delivering information or a single point of view (e.g., a training or a media event)
### Is Convening the Right Tool for Your Work?

<table>
<thead>
<tr>
<th>CONSIDERATIONS</th>
<th>ALTERNATIVES</th>
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<tbody>
<tr>
<td>Can the purpose/opportunity be clearly articulated?</td>
<td>When the purpose is not clear, focus first on deeper research and framing. Be careful not to develop a too-rigid point of view. Leave space for learning from diverse perspectives in the future.</td>
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<td>Is the issue ripe for meaningful progress? Is there sufficient energy around the issue to “tip” to a new level of insight or action?</td>
<td>When the issue is nascent, ill-defined, and/or lacking critical mass, focus on mapping the system and connecting players with shared interests.</td>
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<tr>
<td>Can the critical stakeholders be assembled?</td>
<td>If not, consider lower-commitment modes of engagement that make it possible for key stakeholders to take part, such as short consultations, interviews, surveys, forums, wikis, or convening virtually.</td>
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## CONSIDERATIONS

<table>
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<tr>
<th>Question</th>
<th>Answer</th>
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<td>Does the purpose/opportunity call for collective intelligence?</td>
<td>No</td>
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<td>Is an extended block of time essential to doing the work?</td>
<td>No</td>
</tr>
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<td>Do you have the necessary resources: 1) ample time to dedicate</td>
<td>No</td>
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<tr>
<td>2) convening facilitation, design, and production support?</td>
<td></td>
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<td>Do you need to be the primary convener?</td>
<td>No</td>
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## ALTERNATIVES

- When the issue you’re working on can just as easily be addressed by individual actors, focus on building their capacity or make progress through 1-on-1 interactions.
- If the work is better suited to shorter blocks of time (less than two hours), consider convening virtually and/or adding a short, focused meeting to other events where key players will already come together.
- If not, hold off until you’ve secured ample leadership capacity and design/production team members, and consider less support-intensive alternatives for connecting the group such as conference calls, webinars, surveys, forums, or wikis.
- If other actors would be better positioned to take the lead role—or are already holding a related convening—explore partnerships.
DEFINING Your Purpose

SHAPE THE ATTITUDES of key stakeholders and the public by inviting thought leaders and decision makers to discuss your initial proposals, use their perspectives to sharpen the ideas, and then use the resulting product to promote broader conversation and action.

EXPLORE NEW APPROACHES and enable creative disruption by reframing, reimagining, or recombining different elements and perspectives. Use these inputs to prototype transformational new processes or services and develop ideas for their adoption and scale.

ANTICIPATE POTENTIAL CHALLENGES and identify new opportunities for intervention, by collecting indicators of how the world is evolving today and diverse perspectives about the directions that it could take in the future.

MOBILIZE STAKEHOLDERS in different parts of a system to act in concert. Help build a shared understanding of the system and the problem, develop consensus around a common vision, align strategies around it, and support one another in the execution.

ENGAGE A DIVERSE range of participants, reflective of different facets of the problem.

ENABLE PARTICIPANTS to exchange information, expertise, and points of view.

BUILD NETWORKS

SHARE LEARNING

INFLUENCE

INNOVATE

DEVELOP FORESIGHT

ALIGN & ACT

MONITOR INSTITUTE
A simple way
to clarify your purpose is to
answer these five questions.
You may want to start with
general answers, and then
return later to make them
more specific, as you make
additional choices about your
design.

“In order to create change, this convening will help participants...

...BUILD NETWORKS by:

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...and SHARE LEARNING by:

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“Beyond that, it’s PRIMARY PURPOSE is to...

☐ INNOVATE  ☐ INFLUENCE  ☐ DEVELOP FORESIGHT  ☐ ALIGN AND ACT  ☐ OTHER

...which it WILL DO by:

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Its purpose WILL NOT include:

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