**Convening Design Blueprint**

The Convenings & Networks team at the Rockefeller Foundation is excited to support your convening(s). We believe that convening is most successful when done with purpose. A great convening becomes possible when we're clear on the key rationale for bringing a particular group of people together, at a particular moment in time, to accomplish something concrete.  
  
This document will walk you through a series of questions to support you in clarifying and capturing the tenets of your convening. These questions intentionally explore your purpose and desired outcome from a variety of angles. We'll refer back to these details regularly throughout the design process.

When you’ve completed the form, please upload it at <https://forms.monday.com/forms/bd2c49440c721e01cf30e6105821023a?r=use1>

**First, what is the working title of your convening?**

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| Click or tap here to enter text. |

**We like to begin our convening consultation process by inviting you to reflect on your own past experience. What is a personal or professional gathering you’ve attended that was particularly memorable and why?** (Feel free to include one response or multiple if completing this form as an organizing team.)

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| Click or tap here to enter text. |

**Convening Purpose and Outcomes**

The next set of questions is intended to sharpen your convening's purpose and to shape an experience that results in optimal outcomes.

**Let's start by further refining the purpose you shared in your initial application... If you were drafting an invitation, how would you describe the purpose of the convening to the invitees, ideally in 1-2 sentences? What is the headline reason for this convening?**

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| Click or tap here to enter text. |

**At The Rockefeller Foundation, we often think of convenings in these different typologies. Which of the following best fits?**

* Diverse stakeholders uncover the nature of a problem, build a shared understanding, and ideate on potential opportunities.
* Groups or individuals build relationships and foster collaboration and support.
* Engaged groups or individuals consider a specific challenge or opportunity and decide how to address it.
* Members of an existing coalition or partnership refine a plan of action and/or secure resourcing commitments.

**If you were to overhear participants sharing \*3 key takeaways\*, what are the 3 messages you hope they would say?**

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| Click or tap here to enter text. |

**Participant experience is captured by the feelings and the sentiments that people feel and express during and after a convening. What do you think this convening should feel like for participants?**

* Inspiring: An opportunity to learn about possibilities and innovations
* Challenging: An opportunity to think deeply
* Collaborative: An opportunity to engage directly with others
* Empowering: An opportunity to access support and resources
* Joyful: An opportunity to celebrate progress and focus on wins
* Creative: An opportunity to brainstorm, share ideas, think differently

**Convening Participants and Roles**

The following set of questions will help us understand your convening participants, both in terms of the role they play in the work and the relational dynamics at play.

**Why are participants being invited to your convening?** (Please select the primary reason.)

* To provide unique expertise (subject matter knowledge or lived experience) not contained within the core working group
* To learn about the challenge or opportunity being addressed, and to leave with a mind opened to new ways of thinking
* To build mutually supportive relationships, connections, and sense of community
* To join a coalition, network, or movement anchored around a specific set of goal(s)
* To identify new solutions with potential to break through an entrenched, complex challenge
* To agree on and help shape a proposal, product, or solution by offering feedback
* To commit resources (e.g., staffing, funding) to the work
* Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**You shared the kinds of participants and organizations that you hope will attend in your initial application. What "roles" do you expect each one will play at your convening? How do you expect they’ll engage after? Complete the table below to the best of your ability.**

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| **Participant Type** | **Role at Convening** | **Role Post-Convening** |
| *Example: Program Partners* | *Provide first-hand observations on obstacles; commit to implementation.* | *Take plans made at Bellagio back to their organization; work to advance the roadmap.* |
| *Example: Expert thought leaders* | *Provide landscaping context; interrogate the approach.* | *Offer feedback at discrete moments, actively champion the efforts in conversations.* |
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**Do the majority of the expected participants know one another already?**

* Yes
* No

**What existing relationship dynamics do you expect might influence the dialogue at your convening? Are there any strong relationships that might influence the behavior of participants?**

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| Click or tap here to enter text. |

**Are there any existing patterns in how these participants convene? How do they typically engage?**

For example: The participants are primarily academics who typically present their work at conferences. They are government officials accustomed to following predetermined protocols.

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| Click or tap here to enter text. |

**Who will facilitate your convening?**

Will you hire an independent professional facilitator? Invite an attendee with subject matter expertise to lead the conversation? Facilitate yourself as the organizer(s)? Please share any initial thinking.

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| Click or tap here to enter text. |

**What do attendees need to know or understand prior to the convening? How might they need to prepare to get the most out of their time in person?**

If any plans exist already to communicate pre-convening information and or advanced preparation, please include them here as well.

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| Click or tap here to enter text. |

**What expertise, perspectives, or opinions do proposed attendees bring on the topics that will be discussed at your convening?**

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| Click or tap here to enter text. |

Don’t forget to upload your response to the site at <https://forms.monday.com/forms/bd2c49440c721e01cf30e6105821023a?r=use1>.