

Chapter 1: Introduction

1a. Welcome to The Rockefeller Foundation's Convening Playbook

Why use the playbook

Convening has enormous potential as a strategic tool. When done well, it can create a step change in advancing progress towards an ambitious impact goal.

Yet, organizing and executing an impactful convening requires significant effort at both tactical and strategic levels. The best practices in the playbook are meant to give you a jumping off point, so that you can move through tactical processes efficiently and expend the majority of your energy on shaping an effective strategy for your convening.

Consider this playbook a step-by-step toolkit to:

- Clarify your goals and align your team's roles and responsibilities.
- Navigate the planning and design process, including avoiding common mistakes.
- Create an engaging and purpose-driven experience for participants.

How to use the playbook

The playbook is organized into five chapters. Each chapter includes essential practices, templates, team exercises, and tools tailored for conveners like you.

Introduction: Overview and table of contents.

Preparation: Setting your team up for success.

Design: Structuring your convening for impact.

Execution: Bringing your plans to life.

Follow-up: Capturing insights and sustaining momentum.

1b. Convening at The Rockefeller Foundation

For decades, global leaders have come together at The Rockefeller Foundation's convening centers to map the landscape of emerging fields, to forge new alliances, to discover breakthrough pathways to impact, and to accelerate collective action in addressing the world's toughest challenges. Through years of experience, we know what differentiates good convenings from great ones. We are thrilled to support you in achieving your convening's full potential, paving the way for sustained impact.

This guide is designed to support both The Rockefeller Foundation partners and external stakeholders in planning impactful convenings -- whether you are hosting a small strategy session or a large, multi-day gathering.

You'll find practical guidance, tools, and frameworks to help you:

- Define a clear purpose for your convening
- Design an effective and engaging agenda
- Identify and engage the right partners
- Plan logistics and ensure a smooth execution
- Translate convening insights into action

Chapter 2: Preparation

2a. Establish clear roles and ensure your convening is well resourced

Step by step

1. Clarify convening roles:

Identify the roles required to ensure nothing falls through the cracks. Typical roles include:

- **Convening lead:** Overseeing the strategic direction and serving as ultimate decision maker.
- **Project manager:** Managing venue, travel and accommodations, outreach and communications, speaker management, materials and messaging, and partner engagement.
- **Content lead:** Shaping the agenda and materials.
- **Facilitator(s):** Guiding the sessions.
- **Additional roles to consider:** Notetaker, tech support, or rapporteur for documentation.

2. **Assign responsibilities:** Map out who is responsible for each role and ensure clear communication about their tasks. Use a RACI framework (Responsible, Accountable, Consulted, Informed) to avoid confusion and redundancy. Clarify decision-making authority for each aspect of the convening, such as agenda finalization, to avoid delays in planning and execution.

3. **Consider adding capacity:** You might determine that there are roles your team is not equipped to play. In that case, consider developing a scope of work and sourcing strong external consultants to support.

Consider...

- How can we ensure that each team member's role is clear and aligned with their expertise?
- How can we build flexibility into our planning rhythms to adapt to unforeseen changes or opportunities?
- What tools or practices will best support coordination among team members?
- How can we involve participants in the planning such that they feel engaged in the work?

Resources:

- **Convening production guide:** A detailed guide that elaborates on roles and production processes for successful convenings.
- **Roles to enable a successful convening:** A top line guide to help you start thinking about the team members who will play the most critical roles for a successful convening.
- **RACI template:** Editable template for assigning roles and responsibilities.

2b. Developing a strategic planning rhythm

Step by step

1. **Create a planning timeline:** Developing a timeline ensures alignment, efficiency and timely execution. Leverage the recommended timeline in the project management plan template, making sure to adjust the time-frames based on your team needs and approval dates.
2. **Establish planning rhythms:** A well-structured planning rhythm ensures alignment, accountability, and adaptability—allowing teams to track progress, anticipate challenges, and execute a seamless convening with clear roles, shared tools, and proactive risk management.
 - Set regular planning meetings with your core team to track progress, address challenges, and coordinate updates. Weekly or bi-weekly rhythms often work best, increasing frequency closer to the convening date.
 - Leverage shared tools like project management platforms or shared calendars to ensure deadlines are met.
 - Assign clear roles and responsibilities for each phase of planning to avoid duplication of work and ensure accountability.
 - Incorporate scenario planning to proactively address risks and have mitigation plans in place (e.g., speaker no-shows or tech failures).
3. **Build in feedback loops:** Building in feedback loops ensures the convening remains strategic by establishing formal checkpoints to review progress and gather input from key stakeholders and participants. Engaging senior leadership early helps align on critical items like strategy and purpose, ensuring clarity and buy-in throughout the process.
4. **Document and share processes:** Set up a centralized document or digital project management tool to track decisions, action items, and timelines. Share this with your team to maintain transparency, alignment, and efficiency. Particularly when collaborating across multiple time zones or organizations.

Consider...

- What percentage of time will the core team need to dedicate to this convening?

Resources:

- **Project management plan template:** A planning template to clarify roles and map out the process and action items.
- **The Rockefeller Foundation Bellagio Center:** Work with your convening partners to discuss what is in scope for Bellagio Center convenings. Follow the Bellagio Center travel guidelines to ensure compliance with booking, reimbursement, and expense procedures for convening participants.
- **The Rockefeller Foundation NYC, DC, and regional convening centers:** Work with the RF Events Team or your local contact to discuss what is in scope for these convenings.
- **Budget calculator:** A planning tool used to estimate and manage the total costs of the convening. (Based on New York City estimates. Be sure to validate before making final budgets).

2c. Recruit the right participants and communicate clearly

Step by step

1. **Define participant archetypes:** Determine the ideal number and type of participants, considering the expertise, backgrounds, and perspectives that best serve your convening's goals. Include voices that will enrich the discussion—such as wildcard thinkers or creative storytellers—and aim for geographic, sectoral, and demographic diversity. Ensure the people who will ultimately use the recommendations or solutions generated are well represented. Pay attention to seniority: convenings are most effective when they include the right mix of decision-makers with authority to act and practitioners or "doers" who can carry the work forward.
2. **Build an invitation list:** No less than 4 months before your convening, curate your participant list using internal databases and professional networks. Prepare for potential declines by identifying a primary invitee and secondary option for each participant archetype.

3. **Invite participants:** Craft tailored invitations with event details, emphasizing the convening purpose and each invitee's unique value to the convening. Send save-the-dates 3-4 months in advance to secure commitments.
4. **Share information:** Provide clear details on key deadlines, travel support, and honorariums (if applicable). Outline participants' roles, including any presentations or pre-event preparation, and designate a contact person for support. Schedule preparation sessions with participants who will play speaking roles at least 1 month before your convening.
5. **Stay connected:** Share pre-event materials such as a participant booklet, discussion prompts, or relevant updates. Foster early engagement through email or pre-event calls to build connections and set the stage for a successful convening.

Consider...

- How can we ensure participants represent a diverse mix of perspectives, expertise, and backgrounds, including divergent points of view?
- How will we build a participant list that mitigates power imbalances among different groups (e.g. funders and grantees, Global North and Global South)?
- How can we maintain engagement before the convening to ensure participants are prepared, connected, and excited about our convening?

Resources:

- **Invitation email:** editable template for inviting participants to your convening.
- **Concept note:** customizable template for outlining the convening's purpose.
- **Convening participant tracker:** a spreadsheet to organize participant outreach and prioritization.

2d. Learn about site-specific registration protocols

Step by step

1. **Secure your venue:** Work with the venue team to confirm the date and time of your convening and align on any other relevant details like maximum attendee size.
2. **Identify key contacts:** Connect with the venue's designated event coordinator or registration lead. This person will be your primary resource for understanding on-site protocols, including access policies, required documentation, and audio-visual capabilities. Establish this relationship early in the planning process.
3. **Understand the venue's registration requirements:** Each venue may have unique registration protocols, from required RSVP systems to release forms. Work with your venue contact to ensure compliance with their specific processes.
4. **Invite participants to register:** Ensure your registration process integrates seamlessly with the venue's requirements. When sending invitations, confirm what information will be collected via the venue's registration protocol, and what information you'll need to collect separately. Verify if attendees need to submit identification, dietary restrictions, or other details, and confirm the required format and systems for such information.
5. **Communicate requirements to participants:** As early as possible in the process, provide attendees with clear, concise information about venue-specific protocols. If this isn't possible at the invitation / registration phase, follow up shortly after with details.

Consider...

- Is there any information you need to collect in addition to what the site-specific teams are collecting?
- Are there contacts you need to include (i.e. an Executive Assistants) for a smooth registration?
- How can you transfer all data collected for the purpose of event registration into ongoing contact management and participant engagement systems?

Resources:

- **Registration for convenings at The Bellagio Center:**
 - The Bellagio Center has its own registration system, including capture of key information such as travel logistics and dietary restrictions.
 - Work with your convening partner to address any questions related to participant registration at Bellagio.
- **Registration for convenings at other Rockefeller Foundation venues:**
 - Work with the RF Events Team or a local contact to discuss registration protocols for tracking RSVPs and capturing key participant data.

2e. Consider options for strong facilitation

Step by step

1. **Define the key role of the facilitator:** Clarify the primary function you *most* need the facilitator to fulfill. Do you require someone to:
 - Keep the agenda on track and manage timing?
 - Encourage and draw out nuance and meaning throughout the convening?
 - Guide the discussion with rigor and/or technical expertise?
2. **Assess internal capacity:** Evaluate whether your team has the skills and bandwidth to fulfill the facilitation role. Consider both the technical expertise and the interpersonal abilities required for the convening. Keep in mind the front of room facilitator will not be able to manage agenda changes or participate fully in the discussion while playing that role.
3. **Determine team facilitation approach:** If you have internal capacity, decide whether one person can handle the role or if responsibilities should be shared. If you decide the role should be shared, be thoughtful about ensuring cohesion across the convening. One way to do that is to assign one person to play the MC role to anchor the experience—even if others facilitate specific sessions.
4. **Explore external options if needed: Sometimes an external facilitator is the right choice.** This is especially true if your team members need to fully participate in the conversation and/or if you determine that the facilitator's role is mainly to hold the room as a "neutral" third party. Research candidates who align with your convening's goals, and account for the financial implications in your budget planning.

Consider...

- What outcomes are we most focused on for this convening, and what role does the facilitator need to play in achieving them? Are we prioritizing smooth process management, fostering meaningful discussions, or providing expertise?
- What strengths and capacities already exist within our team, and how might they align with the facilitation needs?
- If we consider external facilitation, what qualities or expertise are most important to ensure a great fit for our convening? Should the facilitator be deeply familiar with the subject matter, or would a skilled generalist be more effective?

Resources:

- **How to choose a facilitator:** Guidance on selecting an effective facilitator to lead a convening, ensuring productive collaboration and equitable participation.

Chapter 3: Design

3a. Establish a sharp purpose

Step by step

- 1. Learn from strong examples:** Start by reviewing well-crafted purpose statements from past convenings. Analyze what makes them effective — specificity, clarity, and a focus on outcomes. These examples provide a framework and inspiration for developing your own statement.
- 2. Craft a first draft:** Use “mad libs” to create an initial purpose statement, ensuring it includes your intended convening output and outcomes. Once you have a draft, refine it by removing jargon or vague language, aiming for a statement that is concise, impactful, and actionable.
- 3. Socialize and sharpen:** Share your draft with key stakeholders (teammates, co-hosts, a subset of attendees) to gather feedback. Ensure the purpose is easily understood by others and that it articulates a clear and compelling reason to convene. Ensure alignment with the executive sponsor before the design process begins in earnest. Use the feedback you receive to refine your purpose statement.
- 4. Use your purpose as a north star:** The purpose statement should be your north star to apply across every aspect of the convening. Consider the implications for participants that need to attend, speakers you’ll invite, and the agenda overall.
- 5. Disseminate:** Embed the finalized purpose statement into all program materials, from invitations to agenda so that it serves as the backbone for your convening. Communicate the purpose early and often to attendees and stakeholders, keeping it front and center to maintain alignment and focus.

Consider...

- What do you hope will be true after the convening that isn’t yet true today?
- What convening outcomes are most essential? What can be let go of to ensure space for making progress on that essential outcome?
 - Note: These may range from concrete outputs (e.g. we’ll craft the outline for a white paper) to relationship-building goals that fuel momentum in your work (e.g. attendees build relationships with one another such that they’re more likely to collaborate after the convening).
- How can you articulate your aims as clearly and concisely as possible so that attendees know and remember them?

Examples

A vague purpose ... <ul style="list-style-type: none">• includes jargon• is not specific	A sharp, motivating purpose... <ul style="list-style-type: none">• names stakeholders• articulates the problem to solve
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<ul style="list-style-type: none"> • often too broad in scope 	<ul style="list-style-type: none"> • outlines desired outcomes
<p>Example 1</p> <p>We will convene a diverse group of leaders from various sectors to explore innovative approaches to addressing pressing global challenges. Through dynamic discussions and collaborative exploration, we aim to surface transformative ideas, identify synergies, and catalyze momentum toward impactful solutions.</p>	<p>Example 1</p> <p>Government, civil society, and industry leaders co-create guiding principles that will shape a sustainable, responsible mining pilot in the Democratic Republic of the Congo, serving as a proof of concept to attract further investment and engagement; and to secure tangible commitments from participants to sustain and advance the project beyond the pilot phase. Success will look like:</p> <ul style="list-style-type: none"> • We've co-created guiding principles for our pilot's success. • We've secured commitments from governments and the private sector for pilot phase 2 including technical assistance and financial resources. • We've created a 12-month roadmap for scaling our pilot.
<p>Example 2</p> <p>AI is usually framed in terms of algorithms and data, perhaps reined in by ethics and regulatory structures.</p> <p>This convening will bring together technologists and domain experts to make practical progress in a piece of the puzzle that gets much less attention: designing human-algorithm workflows to achieve desired outcomes more reliably.</p>	<p>Example 2</p> <p>To address AI safety as a socio-technical challenge in the legal, journalism, and medical sectors, we will:</p> <ul style="list-style-type: none"> • Recruit leaders & co-create field-specific standards: We'll collaborate to develop sector-specific requirements and scenarios for safe AI use. • Develop an AI Roadmap: We'll outline a structured approach for professionals to self-direct engagement on AI safety within their fields.

Resources

- **Mad lib:** Team exercise to help you craft a sharp purpose statement for your convening.
- **Strengthening your convening purpose:** Additional examples of how to sharpen your purpose.

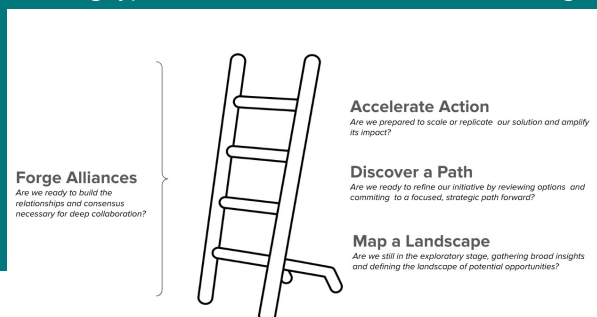
3b. Determine the type of convening you're leading

Years of experience convening around the world have shown that the most impactful convenings start with a clear purpose and a well-structured agenda. Successful convenings engage participants as active contributors, leading to tangible outcomes and a clear path forward. While each convening has its unique flavor, most follow familiar patterns based on their goals and the maturity of the work.

Evaluating where you are on the "ladder"

Organizations convene at different stages—whether refining early-stage concepts or scaling established initiatives. To design an effective convening, it's essential to understand where you fall on the ladder and choose the structure that best fits your needs.

To guide you, we've developed four agenda templates that represent different "rungs" of the ladder. These templates serve as illustrative examples of common convening types, not an exhaustive list. Your convening may blend elements from multiple templates.



Choose the agenda template that best reflects your convening's aims.

Each template offers a foundational structure, helping you choose the right framework for your convening and build out detailed session plans from there. *Click the links below to access each template.*

	This agenda template is for you if you are...	
<u>Map a landscape</u>	This exploratory convening gathers insights and broadens perspectives to define the contours of an initiative. By the end, participants have produced a range of solutions to explore their next phase of work.	<ul style="list-style-type: none"> • <i>Exploring early stage concepts</i> • <i>Pursuing a range of possible solutions</i>
<u>Discover a path</u>	With a focused initiative in mind, this convening refines the strategic path forward. Participants evaluate options and commit to an operational approach most likely to yield the desired outcomes.	<ul style="list-style-type: none"> • <i>Focused on a specific initiative</i> • <i>Refining an operational solution</i> • <i>Seeking strategic alignment</i>
<u>Accelerate action</u>	When a solution is ready to scale or replicate, this convening builds momentum. Participants leave with the tools, connections, and strategies to scale and amplify impact.	<ul style="list-style-type: none"> • <i>Going to scale</i> • <i>Amplifying impact</i> • <i>Seeking to unlock resourcing for scale</i>
<u>Forge alliances</u>	This convening focuses on building the relationships and collaboration necessary to address a problem or opportunity. These convenings either build individual alliances or institutional alliances.	<ul style="list-style-type: none"> • <i>Building coalitions</i> • <i>Aligning on working agreements</i>

How to use the agenda templates

Each agenda includes the following sections. Use them as a starting point to build upon:

1. Convening overview & arc: An explanation of typical structures and outputs for this type of convening
2. Purpose: A summary of the convening's purpose and aims.
3. Pre-convening tips: Guidance for preparing presenters and participants.
4. Agenda & tactics: A high-level agenda outline including suggested "tactics", creative activities and structures to engage participants to build trust and drive work forward.
5. Golden rules: Best practices for creating an exceptional convening.

3c. Design an agenda aligned to your purpose

Step by step

1. **Articulate clear outcomes day by day:** Begin by breaking your overall purpose into clear outcomes for each day. Try completing one of these sentences for each day:

- "By the end of day 1, we will have accomplished ____."
- "By the end of day 1, will have answered _____."
- "By the end of day 1, _____ will be true."

Note: If your convening is one day in duration, apply this exercise for whatever segments make sense, for example AM and PM or three distinct time blocks.

2. **Sketch an agenda outline:** Outline the agenda for each day aligned to the outcomes you articulated. Identify the most essential topics, prompts, or protocols that will help achieve your daily purpose.



Consider...

- How does each piece of the agenda build on what came before? How does the day-by-day flow ladder up to your overall purpose and intended goals?
- How will you ensure attendees feel engaged, purposeful, and inspired as a result of this experience?
- Are transitions between sections smooth with adequate time for attendees to move and recharge?
- What mechanisms are in place to ensure the work or momentum continues after the convening?
- Where is there room for flexibility in the agenda, organizer team check-ins, or other modularity to react to where the conversation is heading in real time?

Resources

- **Sample moderator agenda:** This sample agenda offers a glimpse of a fully developed agenda, aligned to a clear purpose.
- **Sample participant agenda:** This sample agenda paints a picture of the participant experience, highlighting session flow, engagement opportunities, and moments designed for learning and connection.
- **Top tactics:** Proven approaches that foster collaboration, facilitate engagement, and improve sustained action post-convening.

3d. Socialize and refine your agenda

Step by step

1. **Gather stakeholder input:** Share your agenda with trusted collaborators or potential attendees to strengthen the design. This isn't about refining the agenda—it's an opportunity to secure buy-in, surface key issues early, and better understand the role each participant might play in the convening.
 - Circulate a survey to gather feedback on the convening's purpose, participants' perspectives on the theme, perceived opportunities and challenges, and their vision of success.
 - Identify whose input matters most—whether a small, diverse group of trusted advisors or, for smaller convenings, all participants—and engage them more deeply. Consider one-on-one, hour-long conversations in the months leading up to the gathering to check alignment on core questions, gather agenda feedback, and reinforce commitment.
 - Document and share a summary of the feedback received so participants can see how their input shaped the design, reinforcing that the convening is co-created and that their voices matter.

2. **Update with an eye to engagement:** Take a step back and review the agenda to ensure consideration of "convening golden rules."
 - I've built my agenda around the schedule constraints of my convening center (meal times, arrival/departure times).
 - I've identified ways to proactively facilitate connections between participants (e.g., a pair walk, an intentional introduction prompt, rather than assuming it will happen organically).
 - My agenda prioritizes dialogue over presentation to ensure maximum engagement, with no more than 30% of the agenda allocated to time when participants are passively listening.
 - I've scheduled breaks at least every 2.5 hours to create space for reflection and connection, and to keep distractions outside of the scheduled time.
 - My agenda reserves open time for emergent topics to be addressed.
 - I've incorporated time for the organizing team to regroup and adjust the agenda as unanticipated topics emerge.

3. **Identify supporting materials:** Identify the visuals or materials necessary to accomplish your purpose. Develop things like:
 - A deck that matches the flow of your agenda.
 - A workbook or discussion guide to help attendees capture their thinking (refer to *Develop tools to capture thinking* for more detail on what this might entail).
 - A facilitator-facing agenda with talking points (refer to *Onboard Your facilitator(s)* for more detail).
 - An operational "run-of-show" to manage logistics and ensure smooth execution (refer to the *Appendix* for details about on-site logistics at the Bellagio Center).

Consider...

- How are you leveraging the unique expertise and experience that your participants are bringing throughout the agenda?
- How are you incorporating your participants' feedback while also staying true to your ultimate purpose?

Resources:

- **Pre-convening survey:** Customizable template for gathering preferences and insights to inform the agenda.
- **Participant interview guide:** Customizable template to prepare for one-on-one conversations with participants ahead of the con to deepen buy-in, collect insights, and receive feedback on the agenda.

3e. Onboard your facilitator(s)

Step by step

1. **Share context and goals:** Begin by providing your facilitator with a clear understanding of the convening's purpose, desired outcomes, and the group's dynamics. This ensures they are aligned with the event's purpose and aims and they're prepared to navigate any specific tensions, sensitivities, or opportunities that may arise. **Note:** It's possible they've been key partners in the developing the agenda in the first place. In that case, they can dive straight into building their talking points.
2. **Build facilitation talking points:** Work with the facilitator to refine selected tactics and activities. Then craft key messages and prompts that align with the convening's themes and objectives.
3. **Practice the run-of-show:** Walk through the agenda step-by-step with the facilitator, reviewing timing, transitions, and the operational details associated with each piece of the agenda. We encourage you to host a true "practice" session so that the facilitator (and co-facilitators) get to practice saying key framing points and instructions out loud. This allows the facilitator(s) to test their approach and gain confidence in managing the flow of the convening.
4. **Clarify roles and contingencies:** Define the facilitator's specific responsibilities, including when they will lead, support, or defer to others, and who has the final say over proposed agenda changes mid-convening. Discuss potential challenges, like time management or participant dynamics, and agree on contingency plans to address these effectively. Set expectations for organizing team debriefs and carve out "down time" for the facilitator in multi-day convenings.
5. **Develop an operational "run-of-show":** Use the resources in section 3c of this Playbook to plan for and manage operational details at your convening site.

Consider...

- To what extent is there a shared understanding between the lead organizers and the facilitator about what success looks like for this convening?
- When, where and how will we clearly communicate the convening's purpose, goals, and group dynamics to the facilitator?
- Are the facilitator's responsibilities and hand-offs with other team members clearly defined?
- How might the facilitator (along with the broader team) practice key framing points, instructions and prompts ahead of the convening? Note: you'll want to do this at least a week ahead of time to allow time to address any gaps in their delivery identified during the run-through.
- What additional support might the facilitator need from me to feel fully prepared?
- What context can I provide on "what might go wrong," and what contingencies might we explore together?

Resources

- **[Sample facilitator scripts](#):** Examples of facilitator talking points.
- **[Convening question prompts](#):** Examples of tested facilitator questions for various formats that will help drive meaningful and engaging dialogues

Chapter 4: Execution

4a. Develop tools to capture notes and important insights

Step by step

1. **Identify key moments for note-taking:** A convening is not the time for capturing transcripts of everything said. Instead, your focus should be on documenting creative outputs—insights and ideas generated through rigorous conversations, brainstorming, and collaborative sessions. Tailored notes are a key input for post-convening action and help participants to internalize key insights at the end of specific sessions. Prioritize capturing notes during critical moments, such as:
 - Decision-making discussions.
 - Small-group workshops or breakout discussions.
 - Plenary sessions focused on alignment or strategy.
2. **Design customized “note catchers”.** Tailor a “note catcher” template for key sessions. An effective template should:
 - Provide clear instructions, such as: “List the top 3 headlines from your discussion.”
 - Include targeted prompts for essential information, e.g.:
 - “What key decisions were made?”
 - “What are the 3 most pressing questions raised by your group?”
 - Offer flexible space for additional notes, action items, and next steps.
3. **Assign note-takers.** Determine who will capture notes and whether this role is centralized or distributed.
4. **Use AI tools thoughtfully:** AI can augment the documentation process, but it must be used carefully with human judgment in the loop. Consider the following:
 - **AI note-taking tools** (e.g., Otter.ai, Notion AI, Whisper) can help transcribe and summarize discussions. However, be mindful: recording may limit openness of dialogue. Always get participant consent and communicate how and when AI-generated notes will be used.
 - **AI-generated voice announcements** can save time, especially for recurring announcements at large format convenings. Still, ensure they reflect the tone and culture of the convening.
 - **Drafting participant bios** with AI can be a helpful shortcut, especially when pulling from LinkedIn or past bios, but a human should always review for accuracy, tone, and nuance.
 - **Note:** AI often lacks context and can introduce subtle bias or error. It should support and not replace critical human thinking.
5. **Prepare materials in advance:** For digital notetaking, generate and test links, QR codes, or shared documents. For analog notetaking, make a plan for printing templates and organize them by session for easy access. Ensure discussion leaders have the materials they need ahead of their sessions.
6. **Plan for follow-up:** Assign someone to review, clean up, and summarize key takeaways after the convening. Distribute the summary to relevant stakeholders to ensure actionable insights are preserved and shared.

Consider...

- How can we structure time at the end of each session for participants to collectively identify and record key takeaways?
- What tools and materials (e.g., whiteboards, sticky notes, Miro, Google Docs) can we use to make collaboration and note-taking visible in real-time?
- Who will play the role of synthesizing all of the outputs from sessions and reporting back to the group?

Resources

- **Note catcher:** Editable template for capturing notes digitally during specific sessions.

4b. Determine and communicate hybrid participation guidance

Step by step

1. **Decide whether to include virtual participants:** Reflect on the convening's purpose and determine if hybrid participation adds significant value, such as unique perspectives or engagement from critical stakeholders who otherwise wouldn't be able to join. Weigh the benefits against potential challenges, including reduced cohesion, logistical complexity, reduced agenda flexibility, and loss of a sense of intimacy among those gathered. Keep in mind a hybrid event requires planning and executing three convenings - the one in the room, the one in a virtual space, and the way they come together.
2. **If relevant, define roles for virtual participants:** Identify specific roles for virtual attendees, and set clear objectives and time constraints (we recommend no more than 30 min at a time) for their participation. Keeping their contributions focused ensures they will advance the convening's goals and enhance overall engagement. Suggested roles for virtual participants include:
 - A highly dynamic expert to frame up a relevant topic ahead of discussion.
 - An individual "on the front lines" to share lived experience or dynamic updates on a relevant issue.
 - An advisor (or small advisory panel) to offer feedback on emergent ideas.
3. **Plan and set expectations for logistics:** Establish clear schedules and guidelines for hybrid sessions, ensuring all participants understand their roles and expectations. For example, you might share, that "this speaker is joining us virtually because they have unique and instrumental subject matter expertise. Their role will be to spotlight the most critical hurdles to address as we move into action planning." Thoughtful planning and transparent communication help create a seamless experience for both virtual and in-person attendees.
4. **Prepare the facilitator and support team:** Ensure the facilitator is equipped to manage hybrid dynamics and has a clear understanding of the event's purpose and structure. Assign a technical point-person to support the facilitator if needed, including setup of AV and monitoring the chat. Pre-event check-ins with virtual participants can build rapport and align on goals, fostering smoother collaboration during the convening.
5. **Optimize the space and technology:** Set up the room and technology to ensure an inclusive experience for all participants, such as arranging seating to facilitate hybrid dialogue and testing video conferencing tools in advance. Proper planning and adjustments to the physical and virtual environments create a more engaging and productive convening.

Consider...

- Does inviting virtual participants add unique value to the convening, such as access to rare expertise or perspectives that cannot be achieved among the in-person attendees?
- Will the inclusion of virtual attendees meaningfully support the convening's goals without detracting from the depth of connection or engagement for those present in the room?
- Is the effort required to integrate virtual participation worth the potential trade-offs in cohesion, flow, and overall participant experience?
- Are there other creative ways to include perspectives who aren't in the room (e.g. Share a short video presentation ahead of time or utilize a paper or report that someone authored instead of asking them to join virtually).

Resources

- **Hybrid room setup:** A guide for how to manage a hybrid setup.

4c. Invite diverse speakers, define their roles, and prepare them for impact

Step by step

1. **Identify speakers:** Great convenings thrive on diverse perspectives. Review your agenda to pinpoint where external voices will add value. Create a shortlist of potential speakers and assess for balance and representation.
2. **Send invitations:** Secure speakers at least two months in advance. Send an invitation that describes the purpose of your convening, and schedule a prep session ~four weeks before the convening.
3. **Design sessions:** Determine where speakers fit into your agenda and determine what format (i.e. fireside chat, small-group breakout session) best aligns to the objectives of the session.
4. **Prepare speakers:** Prior to the convening, meet with each speaker to prepare them for their role. Review your convening purpose and walk through where their session is situated within the agenda. Clarify the speaker's role and talk through their session (e.g. duration, format, approach). Ensure they're clear on the audience and what you hope participants will think or feel after the session. Provide all speakers with a concise briefing document reiterating key objectives for their session and any logistical details.
5. **Support day-of:** On the event day, remind speakers of their role and session objectives and designate a point person for answering questions.

Consider...

- Are diverse sectors, roles, geographies, and identities represented at our convening?
- Are speakers clear on the convening purpose and what they are uniquely being asked to contribute?
- What support might speakers need? Who can be a backup?
- Does our agenda rely too heavily on panels? How else can we engage speakers to share their expertise in more interactive ways?
NOTE: We recommend 10-15-minute presentations with no presentations exceeding 30 minutes.

Resources

- **Speaker invitation:** Editable email template for inviting speakers to join your convening.
- **Speaker preparation meeting:** Agenda template for 1:1 prep conversations with guest speakers.
- **Speaker brief:** Editable briefing document outlining speaker roles, session design, and logistics, shared in advance and on the day of the convening.

4d. Prepare participants to understand their role and contributions

Step by step

1. **Communicate a clear purpose statement.** After crafting a sharp purpose statement that clearly articulates *why* your convening is happening and *what* it aims to achieve, don't forget to share it with your participants! As you collect feedback, test it for clarity—participants should be able to repeat it back in their own words. Ensure this purpose statement is embedded in advance of the convening through invitations, agendas, or pre-convening communications and materials.
2. **Invite participants to contribute.** Before the convening, reach out to every participant with a brief, personalized message. Express appreciation for their involvement and highlight what specific expertise or perspective you see as critical to the convening's success. Invite them to contribute in a specific way—to help others understand an issue from their perspective, to generate new ideas, to strengthen an existing solution, or to garner support for an initiative. These can take the form of quick virtual touchpoints, phone calls, or written messages.

3. **Reinforce purpose throughout the convening.** Tie every session and activity back to the overarching purpose. Use clear framing language like:

- “This session helps us move closer to our goal of...”
- “As a reminder, we’re all here because...”
- “This connects to the outcomes we’re working toward...”

Consider...

- How will you communicate the purpose of the convening to participants and assess that they understand?
- How will you communicate the specific role you hope participants will play?
- What is your engagement approach and timeline?
 - Will you conduct 1:1s with all participants or send an email to set expectations?
 - Will you gather participants virtually or have an opportunity to engage in person prior to your convening to spark connections and trust?
 - Will you send a pre-convening survey to surface ideas and inform the agenda?

Resources

- **Pre-convening communication to participants:** Editable email template for reminding participants about the purpose of your convening and their role.
- **Top tactics:** Proven approaches that foster collaboration, facilitate engagement, and improve sustained action post-convening.

Chapter 5: Follow-Up

5a. Plan to sustain momentum through post-convening communications and engagement

Step by step

1. **Map out post-convening engagement:** Reflect on how you hope each participant will continue engaging post-convening. Anticipate what resources, connections, expertise, and other contributions are needed to sustain the work, and how participants map to each need.
2. **Decide on communications channels and cadence:** Plan in advance for when the group will first get back together (we recommend a 30-day post-convening virtual meeting) and how often you'll communicate. Consider sending monthly emails or setting up a WhatsApp group, encouraging updates from all participants, not just hosts.
3. **Identify pre-existing milestones:** Identify conferences or events that a plurality of convening participants typically attend, and consider re-convening the group on the sidelines.
4. **Set expectations pre-convening:** Share your expectations with participants ahead of the convening for how you hope they'll engage and contribute afterwards. This is an extension of sharing with participants the unique perspective you're inviting them to share in the room.
5. **Share clear and specific post-convening next steps:** After synthesizing the outputs, share out 3-5 clear and specific opportunities for participants to continue supporting the work. Channel the general enthusiasm and goodwill created by convening by tailoring your follow-up and making it easy for participants to understand where they can contribute.
6. **Mirror progress back to the group:** Be generous with shouting out the accomplishments and contributions of participants to continue building a sense of momentum towards the goals aligned on during your convening. Share progress updates at regular intervals.

Consider...

- Will all participants be involved in advancing the work post-convening?
- What role is each participant uniquely positioned to play?
- How will you sustain the momentum?

Examples

<i>Participant Type</i>	<i>Role at Convening</i>	<i>Role Post-Convening</i>
<i>Program partners</i>	<i>Provide first-hand observations on obstacles; commit to implementation.</i>	<i>Take plans made at the convening back to their organization; work to advance the roadmap.</i>
<i>Expert thought leaders</i>	<i>Provide landscaping context; interrogate the approach.</i>	<i>Offer feedback at discrete moments; actively champion the efforts in conversations.</i>
<i>Government ministers</i>	<i>Provide context on policy landscape and local priorities.</i>	<i>Advance policy elements of the roadmap.</i>

Resources:

- **Post-convening momentum-builders guide:** This guide provides tested approaches for sustaining a convening's momentum into the following weeks and months.

5b. Survey participants to glean important learning and insights

Step by step

1. **Develop a convening survey:** Use existing survey infrastructure if provided. If needed, add questions to evaluate the convening's success and the extent to which you achieved the convening purpose.
2. **Administer the survey:** Share the survey with all convening participants and request their feedback. To improve participation, schedule 5-10 min towards the end of the convening itself for the group to complete the survey before departing.
3. **Review results and glean insights:** Spend time evaluating what was successful and where the convening fell short of expectations. Reflect upon what factors might have caused those results and plan time for discussion with the organizing team.
4. **Communicate insights to key stakeholders:** In sharing post-convening summaries or report outs with participants, consider sharing any relevant results from post-convening surveys.
5. **Take action based on learnings:** Consider how you'll incorporate learnings into post-convening actions, especially as it relates to future convenings. Discuss and align on these plans with the full organizing team.

Consider...

- How will you measure the convening's success?

- How will you communicate what you learned with participants?
- How will the results inform post-convening action?

Sample Survey Questions

- **Net Promoter Score:** How likely is it that you would recommend this convening to a colleague? (1 –10 ranking)
 - If 1-6: What would've made you more likely to recommend this event to a friend or colleague?
 - If 7-8: What specifically about this event makes you willing to recommend it to a friend or colleague?
 - If 9-10: What specifically about this event makes you want to recommend it to a friend or colleague?
- **Worth Time:** Please respond to the following statement: "I feel that the time I put into this convening was worth it." (4 – point Likert scale from Strongly Agree to Strongly Disagree, no neutral option).
- **Connections Made:** "Because of this convening, I made new and meaningful connections." (4 – point Likert scale from Strongly Agree to Strongly Disagree, no neutral option).
- **Inspiration:** "Because of this convening, I feel inspired" (4 – point Likert scale from Strongly Agree to Strongly Disagree, no neutral option).

Resources

- **General post-convening survey template:** A survey template for all other convenings.
- **Post-convening debrief questions:** A set of after action questions that help measure impact and track learnings during post-convening debrief sessions.

5c. Share insights in a post-convening report to align on action and sustain momentum

Step by step

1. **Synthesize learnings:** Review notes captured during the convening and distill the most significant insights, takeaways, and post-convening actions. Do this within 1-2 weeks of the convening, to retain details and capitalize on the group's enthusiasm.
2. **Define the report purpose and audience:** Determine whether there are any reporting requirements for the convening center or organizing institution, ensuring to fulfil those. Consider distributing a summary report to participants to sustain their engagement. Explore sharing convening takeaways with a broader audience connected to the work.

3. **Draft the report(s):** Develop a report that meets the needs of the audience. In some cases, there may be a need to develop more than one version of a post-convening report.
4. **Distribute the report:** Share the report with identified stakeholders. Use this as an opportunity to re-engage participants and move next steps forward. When sharing materials with individuals who did not attend, be sure to provide context.

Consider...

- What are the top ~5 insights or takeaways surfaced during the convening?
- Who can act on those insights? How do you hope they'll use the information?
- How can the report be used to sustain momentum and post-convening action?

Resources

- **Summary reports:** These reports are valuable in tracking insights, impacts and learnings. See some examples below:
 - [Sample report 1](#)
 - [Sample report 2](#)

Resources

Chapter 1

N/A

Chapter 2

1. [Convening production guide](#)
2. [Roles to enable a successful convening](#)
3. [RACI chart template](#)
4. [Convening project management plan](#)
5. [Convening budget calculator](#)
6. [Convening invitation email templates](#)
7. [Convening concept note template](#)
8. [Participant tracker](#)
9. [How to choose a facilitator](#)

Chapter 3

1. [Mad lib worksheet](#)
2. [Strengthening your convening purpose](#)
3. [Typology Agenda: Map a Landscape](#)
4. [Typology Agenda: Discover a Path](#)
5. [Typology Agenda: Accelerate Action](#)
6. [Typology Agenda: Forge Alliances](#)
7. [Sample detailed agenda](#)
8. [Sample participant facing agenda](#)
9. [Top tactics](#)
10. [Pre-convening survey](#)
11. [Participant interview guide](#)
12. [Sample facilitator scripts](#)
13. [Convening question prompts template](#)

Chapter 4

1. [Note catcher template](#)
2. [Hybrid room set-up](#)
3. [Speaker invitation email template](#)
4. [Speaker prep call agenda template](#)
5. [Speaker brief template](#)
6. [Preparing participants with purpose email template](#)
7. [Top tactics](#)

Chapter 5

1. [Convening momentum builders guide](#)
2. [General post-convening survey template](#)
3. [Post-convening debrief after-action questions](#)
4. [Summary report sample 1](#)
5. [Summary report sample 2](#)