CONVENING PLACES SIGNIFICANT DEMANDS on people’s time and resources, so it’s important to make informed decisions about when and how to bring a group together.

As a first step, review your theory of change. Ask whether a convening is the best tool for what you’re trying to achieve. Use the following set of considerations to determine if bringing together a diverse group of stakeholders for an in-person gathering of at least a half day is the best path forward.

<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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<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**

Does the purpose/opportunity call for collective intelligence?

Is an extended block of time essential to doing the work?

Do you have the necessary resources: 1) ample time to dedicate to the convening design and production process; 2) convening facilitation, design, and production support?

Do you need to be the primary convener?

**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.