IN LARGE PART, the success of a convening rests on whether the group of people you assemble is the right mix. This is an important part of the art of convening. It’s easy to start this process by scanning your own or your organization’s contact list and filling the room that way. This may work fine, but it’s worth taking the time to step back and establish a clear rationale for who needs to take part in your convening.

Start by mapping your stakeholders. This means thinking not just about the people who will be in the room but everyone who will be interested in knowing that this gathering is happening.

Two criteria are helpful for developing a rationale for your invitee list:

1. **How relevant they are to achieving your purpose**—In other words, how much will their presence contribute to achieving your convening goal?

2. **How interested they are likely to be in participating**—Take into account their interest in the topic, their ability to commit their time, and their relationship with you.

You can use these two criteria as a way to chart your “landscape” of stakeholders.
ONCE YOU’VE CREATED a draft list, consider how you want to “segment” your stakeholders according to how you will engage them and the type of role you envision for each. Choose one of four options for each person: whether to consult them on aspects of the design, include them on the invitation list, involve them in a lower-touch way, simply inform them—or not include them at all:

**CONSULT:** This is the highest level of inclusion you can give a participant, giving him or her partial decision rights on the purpose, process, outputs, or any other element of the event. Weigh this decision carefully: it is an opportunity to create powerful buy-in and gain valuable input, but could also complicate and slow down your planning process.

**INFORM:** Some stakeholders should hear about the results of the work rather than be involved in the event. This segment could include people you are trying to educate or influence, funders who want to hear about the results of what they supported, or even academics who would be interested in learning about the conclusions.

**INCLUDE:** These are people you want to have participate in your event but don’t need to involve in the design.

**INVOLVE:** There are ways to include stakeholders without giving them the substantial decision rights you would grant to someone who you plan to “consult.” For example, you could ask for their suggestions on what questions to address or tasks to accomplish; ask them to share brief statements of their point of view or provide reactions to what is created; or encourage them to help distribute the outputs.
CHOOSE PEOPLE because they have interest, passion, or expertise in the topic you’re discussing and for their ability to influence the field, not solely because of their title or organization.

INCLUDE AS MUCH DIVERSITY as you can, especially in the qualities that directly relate to the topic. Consider diversity of constituencies (e.g., nationality, profession, organizational type, or field) and perspectives (e.g., political stance, upbringing, training, or worldview), and avoid creating a group that will likely be seen as the "usual suspects." Including deeply different mindsets and identities in the conversation does make it more challenging to create a sense of community, but provided that everyone shares an interest in the outcome, it is also the surest path to high-quality new ideas.

SEEK PARTICIPANTS who have something valuable to offer, are curious to learn new information, are committed to creating new ideas, and are capable of engaging in dialogue with minimal ego. If it is essential to include one or more participants who may have trouble engaging collaboratively, plan to spend time with them ahead of the event to discuss what the work will be and the role you’d like them to play.

LOOK FOR any substantial differences in either perspective or relative status/power. If they exist, make a choice: would it serve your purpose for the gathering to grapple with them directly, or could it be more productive to acknowledge these tensions but focus the conversation elsewhere? The latter may be more appealing, but it requires finding a way for these tensions to be a part of the discussion rather than the proverbial elephant in the room.

“I THINK OF CONVENING AS A KIND OF 21ST-CENTURY COMMUNITY ORGANIZING.”

—CONVENING DESIGNER
Depending on your purpose, you may want to cap the size of the group at a certain level in order to avoid group dynamics that run at odds with the work to be done. While some expert convening designers are able to create large-scale gatherings for a wide range of purposes, complexity increases dramatically as the size of the group increases. If you need to work with more people than can be productive to engage at once, consider running multiple gatherings that each provide input into the broader work. Below are some rough guidelines for what to expect at three common group sizes.

**Small**
Teens to Low Twenties

Generally the largest size that suits intimate dialogue among participants where they can build trust and achieve breakthroughs in how they relate.

**Note:** This is often a good size if your purpose is to influence or align and act, and only a small group of key stakeholders need to participate.

**Medium**
Low Thirties to High Forties

Generally the largest size that suits generative ideation where participants all have the chance to build on one another’s concepts.

**Note:** This is a good all-purpose size range whether your aim is to influence, innovate, develop foresight, or align and act.

**Large**
Fifty to Eighty

Generally the largest size at which there can be meaningful exchange in plenary, the group can contribute to a shared task, and most participants will have a chance to meet one another.

**Note:** This is a good size if your purpose is to influence, especially if your goal is more to inform than to sway. It can also be useful if your aim is to develop foresight and the convening is used to draw input from a large group.
In 2007 the Rockefeller Foundation heard from many health practitioners that the world’s weakest health systems were at a crucial tipping point: with the right investment, “eHealth” technology could help these systems achieve great gains in both quality and efficiency. Rockefeller’s leaders decided to convene the key players in this emerging field to consider what shape it could and should take.

Two galvanizing purposes were at the core of this effort. Primarily, the Rockefeller Foundation hoped these convenings would help to “align and act,” both by building partnerships among players and by creating common IT operating standards. Secondly, they hoped the sessions would influence the field, both by creating healthcare policy recommendations for national governments and by inspiring donors to give more private funding.

With a clear sense of the key issues and key players in the eHealth space, the designers steered away from creating one large convening, which would be at odds with their two purposes. Instead, they organized a series of separate convenings to address the eight most important questions: two week-long convenings of 25 to 30 participants happening in parallel each week for four weeks. The topics of each week’s two convenings were closely related, so that interesting conversations could be sparked between the two participant groups during shared dinners and activities. Industry, donors, governments, researchers, and civil society were all represented.

These eight events proved valuable networking opportunities for a range of diverse participants and also created a substantial body of persuasive material for governments and donors. Even better, the convenings launched a set of robust activities: the creation of the mHealth Alliance, a new approach to open source electronic health records, a new national health network in Rwanda, and noticeably greater momentum for eHealth throughout the Global South.