ONE OF THE MORE ARTFUL ASPECTS of choosing who to invite is composing a group that will be well positioned to create new knowledge together. Doing this well can be a decisive factor in achieving the kinds of collective intelligence that only a convening can generate.

TO GET STARTED, ASK YOURSELF what common ground this group already shares, and how you can expand it by the time they need to work together. If you’re lucky, the purpose you have in mind is one that your group is already primed to work on when they gather. But some of the most powerful convenings are designed to be a bridging moment for a group of deeply diverse actors who may share little common understanding beyond their passion for the purpose. This is especially true for those focused on innovation and creating foresight, which often involve bringing together people with deep vertical expertise in different disciplines.

Questions to ask

IF THAT TYPE OF BRIDGING is necessary with your group, ask yourself:

- WHAT INFORMATION related to the topic will everyone in this group already understand? What perspectives will they already agree on? Use this foundation as a starting place.

- WHAT BASIC INFORMATION will everyone in the group need to understand in order to work collaboratively toward the goal? Think through each participant, or type of participant, and look for gaps between what they will need to know and the starting point. Find ways to bridge these gaps, which could be as small as an understanding of the other participants’ backgrounds and recent work, or as large as having a deep understanding of the current state of play in an emerging field.

- COULD THEY LEARN what they need ahead of time—from materials that you or other participants provide? Note that in most cases, at least a third of participants will skim or ignore the pre-reading, and the rest will dedicate only a small amount of time to it. So be conservative in the amount of material you provide and choose pieces that they will be motivated to study.

- COULD THEY LEARN what they need in the opening stages of the event—from other participants, from a speaker, or from you? This information will certainly be heard but costs precious time and can leave action-oriented participants feeling impatient.

- WHAT INFORMATION or perspectives can you provide that will provoke discussion, whether because they are new or because they are controversial? And, as above, do you want to provide these perspectives ahead or time or at the event itself?
Ideas to try

- **INTERVIEW** knowledgeable participants beforehand and share their perspectives as a pre-read to help get the group up to speed.
- **RESEARCH** and share background information on unresolved questions if participants would not know the full picture themselves, or when there is not time to construct the picture collectively.
- **BEFORE THE EVENT**, ask participants to share experiences or information related to the topic, and then play those back through a pre-read, in opening remarks, or on a wall poster.
- **DURING THE EVENT**, divide participants into groups for more intimate discussion and learning or have them participate in team activities that tap into their respective areas of expertise.
- **ENGAGE** in collective history-telling and landscape-mapping at the start of the day to give each participant the chance to have their point of view heard and establish a shared understanding of the issue's background.
- **CREATE** “playing cards” for key information or ideas and design breakout group activities that let participants absorb that information and respond to it.
Defining the field of “impact sourcing”

When program officers at the Rockefeller Foundation set out in 2010 to accelerate the field of “impact sourcing” in Africa, they knew that a convening of the key actors (and principal competitors) would be a powerful tool. They believed in the core promise: that businesses could achieve a win-win by outsourcing their business processes to vendors in Africa who drew their labor force from poor and disadvantaged communities. But the field was at such an early stage in its development that they were concerned that the conversation would get bogged down in debating basic matters of fact rather than bigger questions about the field’s boundaries, direction, and potential for growth. To make the most of the group’s time together, they worked with Monitor Inclusive Markets to produce a whitepaper documenting the current state of play: whether there was a field, how large it was, and what needed to be done for the field to grow.

All of the convening’s participants got a copy of the whitepaper three weeks in advance, and the gathering began with an opportunity to respond with comments. This enabled the group to then move into a conversation about the future of the field with a deep agreement on the facts of what was currently happening.

One of the most important points established by the whitepaper was that the field could be expected to grow as large as $20 billion by 2015, employing 780,000 workers, which gave participants a sense that they were part of a fast-growing pie with room for each of them to have a slice. The result was a productive, focused, forward-looking dialogue that created a sense of common purpose around supporting the rapid growth that they all believed was possible.

After the convening, the whitepaper was expanded to become a public statement of participants’ shared vision, a far stronger statement than the foundation or any other single actor could have made on its own. To see the results, read “Job Creation Through Building the Field of Impact Sourcing” at http://j.mp/10YnxOo.