FOLLOWING THROUGH
ASSESSMENT

Designing a Convening

MANY CONVENINGS are part of larger efforts to change complex systems. Assessing that work is challenging because causality is hard to assign and the time horizons required for change are long. Assessing the impact of an isolated convening within a broader systems change effort is a similarly difficult proposition. Below are some guidelines for how to evaluate the effectiveness of your convening.

Long-term assessment

- **DRAFT** the assessment plan at the start of the work, in tandem with defining the convening purpose and intended outputs.
- **IDENTIFY** where the convening fits within a broader theory of change and plan for action.
- **ASSESS** at intervals—e.g. immediately after a convening, at two to three months, and at six months.
- **EMPHASIZE** learning, action, and lasting change over simply the transfer of information, since convenings often plant seeds for the future.
- **FOCUS ON** meaningful contribution toward impact, rather than attribution.

**CAPTURE AND SHARE** what is learned, adding to institutional knowledge about holding effective convenings, as well as programmatic learning.

Short-term follow-up

- **SURVEY PARTICIPANTS** at or immediately after the event, asking questions that dig into the quality of their experience. Be as comprehensive as you can without demanding too much of their time. If the event is part of a series, keep questions constant for longitudinal comparison.
- **DEBRIEF THE PROCESS** with all the organizers in a way that is open and honest, and capture detailed notes on how to improve the process in the future, for this specific group or for convening in general.

- **FOLLOW UP PERSONALLY** with participants and key stakeholders after enough time has passed that they can see what value the convening produced for them (often two to three months after the event). A phone call will likely yield a more thoughtful response than an email.
- **PLAY BACK WHAT YOU HEAR** about the event’s effectiveness, so that participants can see that you’re paying close attention and learn what value it provided to others. If you’re tracking longer-term indicators with a formal assessment, you may want to provide further updates as you gather more evidence of impact.

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DIVERSE ASPECTS of a convening’s impact can be measured at different intervals after the event. Every convening serves a different contextual purpose, so there can be no single standard, but the list below is a starting place for what indicators are often relevant.

Prior to the convening, be sure to gather data on participant expectations—what they say they want to get out of the gathering—and integrate this into your indicators of impact.

**DURING & IMMEDIATELY AFTER**
- Level of participant engagement
- Strength of community (e.g., new connections established, level of trust)
- Extent to which participants are energized and motivated to act (e.g., commitment or demonstrated willingness to take part in follow-on activities)
- Level of knowledge retained from what was communicated and discussed during the convening
- Tangibility and usefulness of outputs (e.g., a new prototype or protocol) and concreteness of next steps

**2-3 MONTHS**
- Levels of ongoing communication and other information flow among participants (e.g., listserv activity)
- Level of knowledge applied that was developed during the convening
- Progress made on next steps articulated at convening
- Continued work on the outputs
- Extent to which participants initiate new projects or activities inspired by convening
- Emergence of new collaborations among participants who connected at the convening

**6+ MONTHS**
- Same as two to three months after, plus...
- Whether the convening is viewed as making an important contribution to:
  - Shifts in the public discourse
  - New tools or services being developed
  - Stronger performance by organizations and groups working in the system
  - Progress on desired field-level outcomes
FOLLOWING UP on the Convening

FOLLOW-THROUGH can take a number of forms depending on the convening’s purpose. For example, if the purpose is influence there will be more focus on spreading ideas from the gathering and broadening the conversation. If the purpose is action-oriented, make sure the infrastructure is in place to enable next steps.

Enabling action

- **MAKE SMALL SEED GRANTS** quickly available for developing ideas that emerged (if you have the ability or can secure the funds).

- **PUT DEDICATED RESOURCES** in place for post-convening communication and coordination (such as part-time staff to steward an action plan) and check up on participants’ progress against any commitments they made.

- **IF THE CONVENING CONCLUDES** with a set of action-oriented goals, schedule a check-in after an appropriate period of time, to provide accountability and continued support.

- **ENGAGE CONVENING PARTICIPANTS** in follow-on discussions of implementation and planning.

Maintaining engagement

- **FOLLOW UP INDIVIDUALLY** with particularly valuable participants to thank them and discuss whether they would be interested in other opportunities to engage in convenings that fit their capabilities. Maintain a database of these individuals that is shared across the organization.

- **IF THERE IS A SPECIFIC** conversation that at least a portion of the group would like to continue, a strong moderator can sustain it on an email list, bulletin board, or Facebook/LinkedIn group.

- **MANY CONVENINGS** are held in series, to engage different groups or address different aspects of an issue. If that is the case, give participants the option to stay up to date on what happens at later gatherings.
Broadening the conversation

- **IDENTIFY** already-scheduled gatherings related to the convening topic and introduce relevant ideas and actions from the convening into those conversations.

- **HOLD BRIEFINGS** for stakeholders who weren’t able to attend, such as through a webinar that communicates the event’s key ideas.

- **SHARE IDEAS** from the convening online and invite public comments, whether in the informal format of a blog post, a public op-ed sharing a perspective, or a longer report that builds on what was shared at the event with deeper research.
Rallying international donors to prevent widespread famine in the Global South

Famine was threatening developing countries in 1969, with the output of their traditional farming systems predicted to fall short of the needs of their rising populations within six years. Many observers believed the situation was dire and that food aid from governments and existing institutions could not fill the gap.

The leaders of the Rockefeller Foundation and the Ford Foundation saw the potential for a solution in the recent advances made by their four recently created international agricultural research centers. These centers focused on improving methods for cultivating staple crops and had found ways to increase farmers’ yields. The foundations’ leaders invited the heads of 15 aid agencies to convene at the Rockefeller Foundation’s Bellagio conference center, along with the head of the United Nations Food and Agriculture Organization, and asked for their support in continuing the work.

The response was more than the two foundations had bargained for. Impressed by the research centers’ achievements and galvanized by the specter of famine, the agency heads decided not only to support the existing centers but to use them as a model for establishing new centers that could broaden the search for ways to increase developing-world farm yields.

Acting on that decision required a series of follow-on gatherings. Rockefeller and Ford held a second convening of agricultural experts to develop ideas for what the new centers could study. The donors met at a third convening to settle on the final research agenda, and then a fourth gathering established the formal structure of the new network of organizations.

These conversations led to establishing a new organization, the Consultative Group on International Agricultural Research (CGIAR), whose research in the following years played a central role in the “Green Revolution.” While many have criticized the shortcoming of their methods, CGIAR and other actors in the Green Revolution continue to be widely credited with averting famine. The results of their work can be seen in the approximately 250 percent rise in global grain production from 1950 to 1984.