Sending Effective Invitations

Powerful in all situations
Highly recommended in all situations
Highly recommended in some situations

Purpose: To engage and excite people in the purpose of the convening and help them to understand how they can contribute.
When to use: Before the convening.
Who is this for: Convener(s).

An invitation is the first impression to motivate or demotivate participants to come to the convening. Sending an effective invitation is an important step in having desired meaningful representation (see Planning for Meaningful Representation).

Benefits

It helps the convener to clearly state who needs to be there and what needs to happen in the convening. It prepares the chosen participants for why they are coming together, what is being requested of them (which part of themselves to bring), what to expect, and what role they might play in the occasion (should they choose to accept).

Potential challenges

Some invitations are full of information and the reader may not be interested to read it all or they might miss the key point. This might lead to misrepresentation of the convening. For ease of reading, it can be useful to make key words **bold** or *italic*, divide the invitation by key headlines, and have a good balance between providing the right information versus brevity and simplicity. Send any further details as attachments

How to write a convening invitation

To attract and engage people to participate in the convening, the invitation must be persuasive and convincing. An effective invitation must contain the following key details:

Subject line

Most people are interested to read the whole invitation if the subject line is interesting. Invest some time in crafting a subject line that is catchy and calls out to the reader.

Opening

As you did for the subject line, the opening should grab attention and lead the reader to the next paragraph. Use language that is personal, direct, warm, and speaks to the person as an important relationship, whether existing or new. Based on your earlier relationships you can make the invitation formal or casual.

Reason for the convening

Make the convening's purpose clear and position it as part of the larger goals that it serves (for more guidance and context see Purpose-Led Convening). Beyond telling them the purpose, you should also tell the reader why the

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agenda is important and how they can contribute. To lay the ground work for a collaborative atmosphere, ask people to come because of their background, capabilities, and interests as individuals-not because of their position or because they represent a particular organisation. If you have an agenda, instead of overwhelming them with a detailed description, send it as an attachment. Do not make the logistics of the event the central point of the invitation. However, it is good to mention who will cover the costs related to the convening (transportation, accommodation, per diem etc.) since it has a budget implication for the participant.

The when, and where

Include at least the city where you plan to hold the convening, the date(s), and the amount of time you are asking for, even if you haven't yet settled on a specific venue for a face-to-face convening. The chosen venue should feel accessible and comfortable for both women and men and persons with disability, with all the required facilities (childcare, separate prayer rooms, and separate toilet etc.).

If you are planning an on-line convening, make sure the participants understand the difference in time zone or send an additional reminder using an appropriate form of communication for each of your invitees.

Response request

Before closing the invitation, it is wise to insert a brief line that communicates your request. For example:

- 'Kindly contact me to confirm your attendance.'
- 'Please refer to the attached pamphlet for more information.'

Closing

Always close the invitation with your name, job title, company name, and signature. Mind hierarchies where necessary and consider who will sign the invitation.

If the CEO of your organisation is signing the invitation letter, add a sentence at the bottom of the letter saying "for further communication of this subject, contact 'Insert Name, Title'." It enables the participants to have a contact for follow-up communication and avoids clogging up the CEO's inbox.

Delivery

Deliver the invitation through existing relationships wherever possible, since a personal appeal is considerably more effective. It is also good to use a combination of in-person, phone, email, and hard-copy invitations. To follow-up, use the communication method you think is best for that particular person. Be sure that you send the invitation early so the reader can plan to attend the convening. Consider the timing or mood of the recipient institution. If necessary, wait a few days before sending the invitation if there is a risk of it being missed or ignored.

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Additional tips

- Demonstrate a commitment to inclusiveness and participation.
  - Make sure the language used in the invitation is gender neutral (avoid referring to participants as she/he).
  - If you have a specific request regarding attendance mention on the invitation, for example 'we would appreciate it if you could send a man and/or a woman, a specific expert, a youth representation, etc.'
  - Fill any pote ntial information/knowledge gap by offering overview sessions or pre-convening reading (a brief, a flyer, or something exciting) for new participants, if necessary.
  - Ask for any particular requirements that would better enable their full participation.
- Once you know who will participate in the convening, send an update to inform the group and start building engagement.
- For regular meetings, share any developments that might have happened since your last meeting.
- Proofread the invitation before sending it.
- Consider asking invitees, 24-48 hours before the scheduled convening, to (re)confirm their attendance, even if they already accepted the invitation to attend.

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