

SOP: Participant Identification and Invitation List Creation

This SOP details the process of **participant identification and invitation list creation**, including criteria for selecting participants, methods for gathering participant information, verification procedures, and the development of a comprehensive invitation list. The goal is to ensure accurate and organized identification of all potential participants for events, meetings, or research, facilitating effective communication and engagement.

1. Purpose

The purpose of this SOP is to establish a standardized process for identifying and listing participants, ensuring that all relevant persons are included and accurately documented for smooth event or research execution.

2. Scope

This SOP applies to all staff responsible for organizing events, meetings, workshops, or research activities where participant involvement is required.

3. Responsibilities

- **Event/Project Lead:** Oversees and approves the participant identification and invitation process.
- **Coordinator:** Executes procedures as outlined, documents, and reports progress.
- **Support Staff:** Assists with data collection and verification.

4. Procedure

- 1. Establish Participant Selection Criteria**
 - Define the objectives of the event/meeting/research.
 - Determine participant qualifications (e.g., job role, expertise, demographic, region, previous involvement).
 - Document inclusion and exclusion criteria.
- 2. Identify Potential Participants**
 - Utilize internal databases, registration forms, prior attendance records, or recommendations.
 - Conduct open calls or targeted outreach if applicable.
- 3. Gather Participant Information**
 - Collect full name, contact details, affiliation, role/title, and any other relevant attributes.
 - Use standardized forms or digital tools to ensure consistency.
- 4. Verify Participant Information**
 - Cross-check data to ensure accuracy and completeness.
 - Contact participants directly if clarification is needed.
 - Request supporting documentation where required.
- 5. Create the Invitation List**
 - Compile verified participant details into a master invitation list (see table template below).
 - Review the list for duplicates and ensure all selection criteria are met.
- 6. Approval and Finalization**
 - Submit the list to the Event/Project Lead for review and approval.
 - Finalize the invitation list and prepare for distribution.

5. Invitation List Template

#	Full Name	Contact Email	Affiliation/Organization	Role/Title	Eligibility Verified (Y/N)	Notes
1	Jane Doe	jane.doe@example.com	ABC Corporation	Manager	Y	

2	John Smith	john.smith@example.com	XYZ University	Lecturer	Y	Invited as keynote speaker
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6. Documentation and Record Keeping

- Securely store all participant data in compliance with privacy regulations.
- Maintain records of selection criteria, invitation lists, and communications for audit and review purposes.

7. Revision History

Revision Date	Version	Description	Author
2024-06-15	1.0	Initial SOP creation	Your Name