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About Planning a Conference

CONFERENCES of all sizes and sorts are important in business life, in professional life, in politics and in the home. Many a person has been frustrated in carrying out his plans because he did not consult the people concerned, learn their ideas, and win their interest.

The conference we are about to plan is not a convention of men and women who have come together for good cheer, but a meeting of people to discuss issues of interest to them, to contribute ideas, and to carry away thoughts that will be worth remembering.

We live in a society of growing complexity, in which no one person can know all about anything. A conference brings together people with diverse notions and varied kinds of information. The exchange of thoughts and the pooling of ideas and the study of solutions — these are the essence of the conference method.

There are subsidiary benefits, too. A conference will give the people who participate in it a better sense of identity. They will be confirmed in their partnership in a common effort. They will prove to themselves the benefit of convincing and persuading rather than overruling one another.

Why hold a conference?

Before deciding to have a conference, you must make up your mind as to what the purpose is. You need to validate the problem in terms of the people you propose to invite: is it really their problem, or so related to their place in the scheme of things that they are likely to have something of consequence to contribute?

If a conference is called because a leader in business, education, or other activity has a plan or programme he wishes to have adopted, he will present his thoughts and turn the matter over to the group for discussion. In another sort of conference the leader may wish to secure opinions about a matter before he reaches a decision. In that case the results will be better if he

withholds his own opinion until there has been free and open discussion. In either case, if there is not open and free discussion, it is not a conference.

There is no ready-made design for the conference you are planning: it must be worked out in special terms with the aid of general principles.

The first question to answer is: "What more than anything else is the hoped-for outcome of this conference?" The subject of the conference must present a problem, a felt difficulty, and it must give elbow-room for discussion. It must be a subject that is of significance to all the persons you are inviting. There must be expectation of reaching a product, an end result that will be useful to you and to the participants. You are not looking for glib agreement with your ideas, but for a solution grounded on principles and the knowledge contributed by the conferees.

Do not lose sight of the splendid opportunity this gathering gives you to tap the creative resources of all these individuals who come to your conference inspired by fellowship in a mutual endeavour and stimulated by the exchange of ideas. Determine at the beginning to so shape your conference as to make the most of it. If people go away from your conference with the feeling of belonging to your organization in a valuable way, that is a bonus value that may be more important to your business than all the other conference benefits.

This statement is true of all sorts of conferences, from the great trade association conference through those of individual businesses and professional societies, to the family conference. Just remember and observe the ground rules: the leader may be a coach but must not dominate; the discussion should be to the point; there must be no "needling" or discourtesy.

About planning

Any event succeeds or fails according to the preparation given it. Vital personalities are careful to plan

their projects in detail. They take all the measures necessary to insure the fulfilment of their aims.

Unless you plan early and well your conference may dribble away into irrelevant channels, ending in confusion rather than your hoped-for agreement.

You must decide in planning your conference whether it is to be a free-wheeling gathering in which a problem is stated and then debated at large, or whether it is to be a guided conference in which you endeavour to save time and effort by keeping discussion in the groove.

Problems in industry and in voluntary organizations will usually fall within one of two categories: problems of human relationships and problems of techniques. It will help you to decide the nature of your conference if you pin-point the area, but you must make some allowance, too, for overlapping.

When you reach this stage you may benefit by reading parts of volume one, the Report and Proceedings of H.R.H. the Duke of Edinburgh's Study Conference 1956 (Oxford University Press). It tells how that very successful conference was planned and carried out.

Your study of this book, added to your experience in other endeavours, will convince you that it is dangerous to think that things will work themselves out if left alone. This is specially true on the level of a conference, where people of varied experience and many dissimilar attitudes are brought together. Planning is needed for efficiency, because it helps a conference to work things out in the best way in the shortest time with the least dislocation.

But don't plan in such fine detail that the conference sinks into *rigor mortis*. Over-organization leads to the strangulation of enterprise. Moreover, it may cause you personal trouble, because a tightly-organized operation is more subject than a loosely-organized one to suffer complete wreckage if something goes awry.

Managing the conference

There is a difference between managing a conference and being its leader. The chief executive of the company, association or group may plan and organize the conference and keep his finger on its operation right through to the final report, but assign platform leadership of the conference to someone he selects for the special capabilities a competent conference leader needs.

Some one person must be top man in preparation of the conference. If you are taking on this responsibility you will need helpers, perhaps committees, but you yourself will be accountable for the success or failure of the project.

If yours is a big conference, the steering committee may need to appoint others: a conference members

committee to send invitations, arrange transportation, and welcome visitors; a programme committee to draw up time schedules, arrange a meeting-place, provide facilities such as black-boards, projectors, and so forth.

Don't allow your committees to skimp their duties of preparation. Do not allow anyone to assume that someone else is looking after something.

One of your committees should be versed in the principle so well known to educationists and salesmen—that communication is achieved best when done through at least two of the five senses. If the topic of your conference lends itself to illustration by graphs, slides, moving pictures, exhibits or black-board exposition, see that your committee provides them. Check on three points about visual aids: are they easy to grasp? are they accurate? are they pertinent?

An idea file

This would be an appropriate time for you to start an idea file. All you need are: a box like a recipe file to hold 3" x 5" blank guide cards and cards on which to jot down your ideas. Mark your guide cards to indicate sections of your planning, such as "visual aids, seating, exhibits, speakers, invitations." Go through this *Monthly Letter* to give your file a start, and then whenever an idea occurs to you write it down and put it in your file. By the time you come to make the first move in the detailed organization of your conference you should have a wealth of ideas that will make your planning relatively easy and contribute toward the sure success of your project.

One of the most important sections in your file will be headed: "timing". This is something that will run all through your planning. Nice judgment is needed to plan a schedule in which timing is not too tight for effective work and yet not so leisurely as to let the conferees sink into the doldrums. You need to keep the position fluid, so as to make the most of new or developed opportunities, and yet be ready for difficulties when people take the wrong turning and seem bent upon exploring irrelevancies.

Don't commit yourself wholly to the first conference draft you draw up. Be flexible. Keep improving it until your closest examination and your keenest thought tell you it is satisfactory. But start far enough ahead to allow time for this scrutiny. You must not menace your conference by crowding changes upon your people in the last days.

Here are some questions to ask in that final checkup; is the topic right and is it properly stated? are the authors of background material wisely chosen? are the study group leaders right? are the speakers right? are all these right not only as individuals but as a whole?

is the plan right for those who will take part, or is it top-heavy with technicalities or idealism or selling or anything else?

Building up the conference

Your advance notices should awaken interest, giving those you invite a sense of purpose and destination. The notices should present the purpose in such a way as to win a "yes" response: "yes, it is needed; yes, I can help."

State what the conference is about, and show why the conferee is interested in it. Put the person you are inviting at ease. This isn't an indoctrination session any more than it is a social event. It is a get-together for a mutual talking-out of problems and a co-operative making of plans. Tell him you believe he has something worthwhile to contribute.

Make it clear that there is no "catch" in the invitation. You have no subtle motives, but genuine interest in hearing what your people have to contribute.

Once you have sent out your announcement you have passed the point of no return. You must go on, at whatever cost of time and energy, to make your conference a success. Keep checking your committees, and inform everyone who is working with you about progress and developments.

An important part of building up your conference is the provision of background papers. Everyone who is to participate in the conference should be given all necessary material well in advance of the meeting. These background papers will ensure that all persons attending your conference approach it with the same opportunity of contributing intelligently. The papers should be informational, and not propaganda for any person's ideas. The place for expressing opinions is when the conference gets down to brass tacks discussion.

See that one of your committees is charged with the important task of setting up a clearing house adjacent to your meeting-place to provide information that conferees may require. Your company or institutional library can assemble a broad selection of publications dealing with the subject matter of the conference. It is possible for your librarian to borrow books from public libraries or from special libraries to fill blank places in your own collection.

Choosing a leader

The leader is the kingpin in the success of the conference. He can make it or break it. His fitness through preparation and skill should be a major concern.

Consider these basic responsibilities of the leader: to direct the group thinking in an orderly manner; to present the problem correctly and clarify it so that participants can discuss it intelligently; to follow

the discussion and keep it on the track in a gracious manner; to summarize the discussion at appropriate periods.

When you draw a profile of a conference leader, you will find that it shows the following characteristics: a high degree of intelligence, a happy sense of humour, broadmindedness, inquisitiveness, alertness, patience, freedom from prejudices, integrity.

To all this there might be added a certain sort of humility, for nothing will kill a conference quicker than to have the leader act as if he knew it all. He is the moderator of a group of people who are expected to do their own thinking and express their own opinions.

The leader must prepare himself. Too many men who would not attempt to make a speech before the public without careful preparation and rehearsal will go into a conference with little knowledge of the art of conferring and no preparation of the subject. The leader is not supposed to know as much as the aggregate of all those who are before him, but he should at least be able to pronounce the words and follow the discussion with understanding.

It would be helpful to have the leader write an outline of what he believes his duties to be. It might include items like these: keep alert to the nature and trend of the thinking and analysis; catch and record statements which are useful at the moment or later on; check discussion when it drifts away from the point; start up the discussion if it should die down; get attention given to all angles of the problem, and encourage the participants to work out a solution if possible.

The leader must be a man who is skilled at drawing loose ends together accurately and fairly. Too frequent summaries centre attention unduly on the leader, but an active pulling together of the group is needed whenever there is evidence of bogging down. The leader doesn't want his conference to degenerate into a debating society for the sake of hearing people talk. Make it an incubator of ideas. Watch for smouldering thoughts and fan them into fire.

The leader's task from the beginning is to keep minds open and running, not vacant and idling. He must be competent to restrain his gathering from breaking up into little groups of people talking together. The only break in solidarity of the conference he should allow is when planned groups discuss points assigned to them.

Selecting conferees

What type of person are you going to invite to your conference? Can you draw up a specification of the sort of person you believe will contribute most?

What you want is a group of experienced people with keen minds, who are determined to find out all they can about the problem and contribute on the basis of that knowledge to its solution.

The conference members must be selected with an eye to their willingness to co-operate with the leader and with one another, to take part in the discussion, to hold their prejudices in check and respect the other person's point of view; to share their experiences for the common good; to conform to the courtesies of debate, neither taking an unfair share of the time to expound their pet theories nor interrupting others.

Conferees whom you invite owe it to your confidence in them to study the background matter you provide, and to come prepared so far as is in their power to contribute significantly and sincerely.

In making out your invitation list, keep in mind the variety of human minds. You will send the same invitation and the same background material to all your people — ten, fifty, a hundred of them — but no two will turn up at your conference with exactly the same interpretation of facts or theory. Every person will bring something of his own, drawn from or conditioned by his life's experiences. Indeed, that is just what you want most: different points of view.

One theme that should run all through your planning and through the conference itself is the need to communicate ideas. Something more must happen to ideas than merely expressing them. Communication is not completed until the ideas enter, influence and stick in the mind of the hearer.

Your planning effort, from the first notice to the summing-up, needs to be audience-centred. You need to write from the point of view of the receiver, who will ask about every message you send: "how does this affect me?"

The conference itself

You will have moments of anxiety as the day draws near to test your plans in action. Having done your part of the organization work you are in the hands of the people participating. Will they buckle down to the job?

This *Monthly Letter* deals with planning a conference, and there is no opportunity in it for discussion of conducting the conference itself. If you have kept pressing since the first move, arousing interest and preventing it from dissipating; if you have selected a leader who is skilled enough not to fumble; then there is little left for you to do.

Your talk on the opening day will visualize for everyone the precise purpose of the gathering and will orient your people away from the jobs they have just

left and into the spirit of dealing with another and wider problem. This is no place for oratory or anecdotes; be simple, sincere and clear.

Try to inspire the conference members at this first meeting, to lift them out of their limitations of habit, to show vividly the zest to be found in being an eager participant in solving problems.

During the conference you will require reports from the leader and his helpers about its progress, and you may have to step in to meet an emergency, to refocus attention on the purpose of the gathering, to jog the conferees out of abstractions.

You will likely appear again at the end of the conference, if only to express appreciation of what has been accomplished, leaving with the conferees a sense of a job well done.

Following through

Try, in your summing-up, to extract from the host of thoughts and impressions some clear-cut principles, and to express them meaningfully.

The conference should not end on a note of general recommendation. Involve those concerned with doing something. If the members believe that education, research and information are needed, press them to consider further what sort of education, research into what aspects, and who is to give what information to whom. Ask them to go into particulars. Who can be enlisted in these efforts, under whose direction? Tell them you will set up an information exchange to serve those who wish to pursue the problem.

The end of the conference may thus be the beginning of its usefulness, if you follow through with the same energy you gave to planning and preparation.

You might send, about a week after the conference closes, a one-page factual digest of points decided. This will keep up interest.

Then, within a month, send a complete report to every participant, not a copy of the stenographic report, which would be tiresome, but one covering all opinions fairly. In an accompanying letter, include an invitation to send you second thoughts or new thoughts — not a rehash of what has been threshed out, but a continuation.

Before mailing the final report, read it thoughtfully with this question in mind: does it provide sharp and accurate material and an inspiring motive for action?

A conference begun, carried through, and ended in this way cannot help but be a broadening educational experience for the sponsor as well as for the participants.