Expert conference facilitator Adrian Segar supplies a penetrating analysis of the limitations of conventional conferences, a clear explanation of a compelling alternative, and a complete road map to creating a meaningful and memorable conference experience for every attendee-every time.

Conferences That Work: Creating Events That People Love

Conferences that WORK

CREATING EVENTS THAT PEOPLE LOVE

ADRIAN SEGAR

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About the Author

ADRIAN SEGAR has organized and facilitated conferences for over 20 years. Realizing that he loves to connect with people, and to create spaces for them to connect with each other, he created the first peer conference in 1992, and has been refining peer conference process ever since. Adrian was an independent information technology consultant for 23 years, taught college computer science for 10 years, and co-owned and managed a solar domestic hot water heating systems manufacturing company before that. He has an ancient Ph.D. in experimental high-energy particle physics, lives in Marlboro, Vermont, and loves to sing and dance.

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Preface

There is a widespread and unexamined assumption that the core purpose of a conference is to transfer knowledge from the learned few to the relatively uneducated many, and that this is best done through the familiar structures of pre-planned keynotes, presentations, and panels. In this traditional model, attendees are assigned a largely passive, secondary role with their spontaneous interactions relegated to mealtimes, socials, and perhaps a few "birds of a feather" sessions. Information is imparted, some good meals are eaten, perhaps some sightseeing occurs, and then attendees go home until next year, when the cycle is repeated.

I think we can do better.

Conferring: Isn't that what conferences should be about? Conferring: "To talk with somebody in order to compare opinions or make a decision." Traditional conferences attempt to disseminate information from a small number of speakers to the attendees. But suppose there was a conference where participants discovered and shared their collective body of knowledge in a way that was relevant and useful to each individual, creating a conference that directly responded to the needs and wishes of the participants; a conference where *the attendees themselves* created the kind of conference they wanted?

Such conferences exist; I call them *peer conferences*. Peer conferences focus on effectively exposing and sharing the vast body of knowledge that conference attendees collectively hold, knowledge that they are eager to share and thirsty to receive. *The goal of every peer conference is to provide a meaningful and useful experience for each attendee.* For this to happen, people need to learn about each other early in the conference. They need to discover the interests they share and the experiences that they want to explore with other attendees. They need support for the resulting discussions, and they need a way to integrate their overall conference experience into their lives.

A peer conference provides a safe and supportive framework for all this to happen.

This book describes and explains the process that I have developed to build interactive peer conferences. It contains much of what I have learned through designing and facilitating conferences for many years. Although the key elements have been central to my conferences from the start, this is still a work in progress. I continue to learn from every conference I run.

Attendees' evaluations of peer conferences are extremely positive. Participants comment on how much they prefer the format. Peer sessions, the heart of the conference, are invariably highly rated. Informal interactions, which this kind of conference encourages, are almost always described as excellent.

A peer conference is appropriate for any group of people who have a common interest and want to learn from and share with each other. There are hundreds of thousands of such groups that could coalesce, meet, learn, and grow via the structure of a peer conference. My intention is that this book both provides the practical details needed to hold a successful peer conference and inspires you to create and participate in these powerful and rewarding events.

A peer conference community story

I still remember the last state consortium meeting I attended, back in 1991. The facilitator asked us to share noteworthy events at our schools. Several attendees from a large university described with pride how they had finally selected a vendor to provide a piece of software for their school—for $250,000. Nancy, Mike, and I looked at each other. We knew we were all thinking the same thing. This school was spending more money on a software package—one that handled just a small part of the administrative needs of the school—than the entire information technology budgets of our two small colleges combined.

At that moment the three of us realized that we were living in a different world from the other educational institutions at the meeting. Five years earlier, none of our jobs had existed. There wasn't anyone around who knew more about what we did than us. Where could we find support for the problems that we *faced?*

After the meeting I felt dispirited, but Mike was undaunted. "I think we should organize a meeting for information technology directors at small schools like ours," he said. Nancy and I agreed to help.

Working together, we publicized a conference that was held June 3–5, 1992, at Marlboro College, Vermont. Twenty-three people came. We didn't know what participants wanted to talk about, or what knowledge they might have, so we asked them to tell us at an initial roundtable. The first evening, we set up a "topic board" where attendees could suggest and review topics for breakout sessions during the following two days.

The conference was an immediate success, and we decided to hold it again the following year. That year 45 people came. The following year, we held two conferences, one on the west coast and one on the east, with more than 80 people showing up.

At the eighth annual conference, I was watching everything going on, and suddenly realized that I had helped to create a community of genuine value, one that would endure for the foreseeable future, even if I stepped away at that point.

As I write this, we are gearing up for our 18th year of conferences. I am no longer an information technology director at a small college, but I still facilitate the annual conference. Each year, 20 to 40 percent of attendees are new, broadening our community ever further.

It is indescribably satisfying to be intimately involved in the formation of a community like this and to get to enjoy its success. May you be so fortunate.

Introduction

In October 2005, my wife and I were riding a hotel shuttle bus to San Francisco International Airport. Two women, seated behind us, started talking:

> Woman #1: "Did you go to the Austin conference last year?"
> Woman #2: "Yes."
> [*Pause*]
> Woman #2: "I don't remember a thing about the Austin conference."
> [*Long pause*]
> Woman #2: "Probably won't remember a thing about this one either."

As part of the research for this book, I interviewed numerous people about their conference experiences. Although most of them had some positive things to say, a solid majority had serious complaints about the quality and worth of the events they'd attended.

> "We sit there like lumps, basically . . ."
>
> "The conference turned out to be essentially the same as one I'd been to a couple of years before."
>
> ". . . being locked in a room with someone who doesn't know what he's talking about."
>
> "Most conferences I go to have the same format. They're all pretty bad."

> "You might as well read a book."
>
> "600 people, 450 vendors. Cattle call!"
>
> —*Some interviewee descriptions of less than desirable conference experiences*

Over one hundred billion dollars is spent every year on conferences. And this figure does not include the value of attendees' time. With this level of expenditure of time and money you'd think that significant efforts would have been made to create conferences that were effective and memorable. I am not deprecating the significant work that creating a well-run conference requires, but far too much energy is expended on the mechanics of organizing the conference, *while far too little energy is spent creating a conference that meets attendees' needs*. We are informed about conferences by email, we arrive by airplane, and we gaze at fancy PowerPoint presentations, but, year after year, over a hundred million people experience a conference process that has changed very little since the 17th century.

What you're about to read will show you a better way to design and run a conference. I've divided the book into three parts. In Part I, *Reengineering the Conference*, I hope to convince you of two things:

- Certain key assumptions made about the format and structure used in most conferences today are fundamentally flawed; and
- There is a better way to structure what happens at a conference, a way that significantly improves the conference experience for each individual attendee.

Once you're convinced, naturally you'll want to know how to put my ideas to work.

In Part II, *Planning and Preparing for Your Peer Conference,* I'll take you step by step through everything you need to know to prepare for your conference.

And in Part III, *Running Your Peer Conference*, I'll cover conference setup and the nitty-gritty details of running a successful conference, from start to finish.

I wrote this book because I've found that peer conferences offer a truly superior conference experience that facilitates intimate connections, supports powerful peer-to-peer sharing and learning, and generates lasting impact. I want to share what I've found with you.

CHAPTER 1

What Is a Conference?

The people I interviewed about their conference experiences had to satisfy the prerequisite of having attended at least five conferences in the last five years. On hearing this, most prospective interviewees asked me how I defined a conference. Did workshops or trainings count? How about meetings over dinner with medical salespeople? Or one-day community forums? I told them they could decide what they considered to be a conference, and, as the interviews progressed, it became clear that the word *conference* means quite different things to different people.

> "Welcome to the Theater Parking Attendant Symposium."
>
> —*Title on a pamphlet being read by a woman sitting next to me while flying between Phoenix and Chicago on August 22, 2005.*

Thousands of books and articles have been written about conducting business meetings. In contrast, fewer than 50 books about conference organization are currently in print, and nearly all of these concentrate exclusively on *logistics*—the nuts and bolts of planning and running a conference—rather than what should actually happen during the event. Considering the massive expenditure of money and time spent attending conferences today, it's disconcerting to realize the lack of critical thought about the group processes used during them.

While it's true that any kind of conference can be improved by employing better logistics—a nicer location, tastier food, smarter organization—improving the logistics of a mediocre or downright poor conference will not make it great. This book is fundamentally about conference *process* rather than logistics.

What I know is how to create great conferences of a certain type. I call them "peer conferences." In order to understand what a peer conference is, it's first necessary to understand what it is not. Let's start by making some distinctions among the bewildering variety of present-day conferences.

How we got here

The word *conference* was first used around the middle of the 16th century as a verb that described the *act* of conferring with others in conversation, rather than a formal occasion where people met and discussed a topic. Over time, the word's meaning shifted to denoting the meeting itself. The neighboring quote is an early, perhaps the earliest, written English example that uses *conference* in the way we would today. Other words that are currently used for conference-like activities, listed with the century they acquired this meaning, are: *congress* and *convention* (17th), *symposium* (18th), and *colloquium* and *workshop* (20th).

In reality, conferences are arenas for many important activities not captured in these terms, such as maintaining and increasing professional status, making useful connections, conferring legitimacy, promoting issue activism, and building community.

Few of today's conferences provide substantive opportunities for consultation or discussion. They are instead primarily conduits for the one-to-many transfer of information on the conference topic. Predetermined presentations dominate these conference programs.

> "These Conferences are held once in a Month by divers Able Masters making reflexions and observations upon the rarest pieces in the Cabinet of his Most Christian Majesty . . ."
>
> —*A Relation of the Conferences Held at Paris in the Academy Royal for the Improvement of the Arts of Painting and Sculpture, as 'tis Found in the Iournal Des Scavans, A. E. H. Love in Philosophical Transactions (1665–1678), Vol. 4, 1669*

In this book I refer to these conference formats as *traditional* or *conventional* conferences: events built around pre-planned sessions where invited experts present to audiences of attendees. Attendee interaction and conference contributions are secondary to the main purpose of these events—imparting knowledge from those who hopefully have it to those who supposedly haven't. In general, traditional conferences provide little or no formal support for attendee interaction, which is expected to occur by default at meals and social events, during questions at the end of presentations, or via "birds-of-a-feather" sessions wedged into gaps in the conference schedule.

Although most people still think of conferences primarily as a vehicle for pre-planned content, the 1990s saw a rebellion against the rigid structure of traditional conferences, leading to the birth of a number of alternative designs. All shared an emphasis on the development of fruitful attendee interactions over the supply of predetermined material. Some of these approaches, such as World Café, the Art of Hosting, and Everyday Democracy, concentrate on building participant connections, conversations, and communities. Shared issues and concerns motivate these events, but their focus is on specific group processes that lead to group outcomes.

Three other conference variants—peer conferences, Open Space Technology, and unconferences—are also attendee-driven, but steer a middle ground between content-driven and group development process models. These conference formats, which I'll cover in more detail later, move the focus of the conference away from pre-planned sessions with fixed presenters and toward a more fluid program that is determined by the desires and interests of the conference attendees. Such attendee-driven approaches have arisen as a response to the rigid structure of traditional conferences.

Face-to-face versus online

I spent the summer of 1973 working for the Long-Range Studies Department of the British Post Office, a long-defunct group that attempted to predict the exciting future that new technologies would surely bring about. The Post Office had just built a few hideously expensive teleconferencing studios, connected by outrageously expensive telephone trunk lines, and one of our jobs was to find out what they could be used for. Could businesspeople be persuaded to stop traveling to meetings, to sit instead in comfortable local studios hundreds of miles apart, handsomely equipped with cameras, microphones, screens, and speakers that magically allowed them to meet as well as if they were all in the same room? Why yes, we concluded brightly in our final report. "A substantial number of business meetings which now occur face-to-face could be conducted effectively by some kind of group telemedia."

Thirty years later, my Macintosh laptop contains all the components of those glossy studios, and the Internet connects me, by both video and voice, to anyone who's similarly equipped. The technology is finally here for the masses, and video conferencing, web conferencing, and virtual worlds are starting to change the ways we have communicated, met, and done business for hundreds of years. And yet, face-to-face symposia, seminars, workshops, trainings, congresses, conventions, colloquia, and conferences still abound. In-person conferences, despite the significant expense and the explosion in other forms of communication, still apparently fulfill attendees' needs in ways that electronic alternatives do not.

Perhaps this will soon change; we may be at the beginning of a radical shift in the form and structure of conferences—a change that will relegate the face-to-face conference, little changed since its first blossoming over 400 years ago, to a quaint, old-fashioned technique, made obsolete by the advent of cheap, ubiquitous, high-bandwidth telecommunications available to every global citizen who wishes to connect with her peers.

It's true that online conferences offer a convenient and low-cost way to receive content, and they can provide limited interactivity. Yet you can also abandon one with the click of a mouse. Online conferences require little commitment, so it is harder to successfully engage participants when the cost of leaving is so low.

If you think of a conference primarily as a way of transferring content, then online conferences seem attractive, inexpensive alternatives to face-to-face events. If, however, you value conferences as opportunities to make meaningful connections with others, face-to-face conferences offer a number of advantages.

I expect that the unique benefits of face-to-face conferences will continue to be valued. The advantages of being physically present with other people, dining and socializing together, the serendipity of human contact, the opportunity to meet new people in person rather than hear a voice on the phone or see an image on a screen, the magic that can occur when a group of people coalesces; all these combine into more than the sum of their parts, building the potential to gain and grow long-term relationships and friendships. Anyone who has been to a good face-to-face conference knows that these things can happen, and that, either in the moment or in retrospect, they may even be seen as pivotal times in one's life.

Able Masters

We don't know much about the Able Masters of the Academy Royal who began holding their art conferences in 1666, but given that the mid-17th century was the dawn of formal art criticism, I don't think the Able Masters sat in rows listening to Abler Masters. Instead, I visualize a room of fledgling critics, magnificently gowned, standing around a Leonardo da Vinci drawing while arguing about the role of perspective in painting, creating a witty salon of a conference, full of arguments and opinions shared among peers.

This vision of mine is a fantasy—yet it illustrates an important point. When a new area of human knowledge or interest blossoms, *there are no experts*—only a vanguard struggling to see clearly, to understand more deeply, to learn. During this period a traditional conference format can only offer an uneasy fit—if there are no experts yet, who will present? Today's explosion of knowledge and, hence, associated conference topics, implies an increasing need for flexible conference approaches that can adapt to spontaneous, real-time discoveries of directions and themes that attendees want to explore.

So, why do most contemporary conferences follow the traditional, prescheduled model? There are several reasons.

Education as gardening

I was educated in England at a time when schools acted as master gardeners, with students their plants. Our teachers sprinkled a rain of knowledge on us and expected us to soak it up, with the successful students absorbing and growing the most. We were encouraged to compete with each other; individual test scores were announced in class, and a ranked list of each class's students, from best to worst, was publicly posted every school term. At the tender age of eleven, the infamous Eleven Plus exam weeded out the "second-rate" students; they went on to second-class comprehensive schools while their top-scoring classmates enjoyed superior opportunities available at prestigious grammar schools—just as gardeners weed less successful seedlings from their faster growing companions.

Not surprisingly, we grew up feeling dominated by our teachers' mastery of their subjects, and we believed that our role was to compliantly learn what they told us, as quickly as possible. In this environment, the idea that we students could contribute to each other's learning was as ridiculous as the idea that garden seedlings could help each other to grow.

Conference process = Elementary school process

In the main, traditional conferences have adopted this common and largely passive model of education, a mode that still permeates society today. Take a moment to think about how you were educated. How much of your time in school did you spend learning through interactions with your peers, compared to sitting in a room listening to a teacher? Probably very little.

There are, of course, important times and situations in which one-to-many classroom instruction is completely appropriate. Much vital learning of basic information and techniques is best imparted by teachers in the classroom. Elementary school students at the same level of achievement, for example, are not going to spontaneously learn from each other how to read and do arithmetic.

But conferences are for adults. By the time most of us reach adulthood, we are able to think critically, to learn from experience and from others, and to be creative in our work and our response to challenges. These abilities allow us to handle and contribute to much more complex and nuanced forms of learning and achieving personal and group goals. And yet, the traditional conferences we attend are still modeled on the classroom paradigm—sit still and soak it up—that we experienced when we were in school.

We have forgotten that we are no longer children and have, unthinkingly, chosen the old, comfortable classroom model for our conference process. As a result, our new adult abilities are restricted to the times during the conference when the classrooms are not in session.

Social events and meal breaks are the times assigned to peer interaction, just like when we were in school and had playground recess and lunch. Yes, traditional conferences continue to treat us as if we were still children.

Traditional conference = Training

One of my hopes for this book is that it will redefine your vision of the core function of conferences, which I see as providing structure and support for a group of people so they can effectively reflect, share, and learn about a common interest. Unfortunately, traditional conferences do not do this well.

Instead, many "conferences" nowadays are primarily *trainings*: events whose foremost aim is to transfer largely predetermined knowledge to the attendees via presentations and panels. This lack of distinction between conferences and trainings is a natural consequence of carrying over our early educational experience into adulthood—we instinctively fall back on the educational modalities we encountered in our youth. Because the word *training* sounds somewhat simplistic, such conferences are often promoted as "professional development"—around 15 percent of my interviewees reported being required to attend conferences for their "continuing education"—and in some professions, especially healthcare and primary and secondary education, such events are often the only kind of conferences that people attend.

Sponsorship distortion

Training-centric conferences can also suffer from an additional influence that further distorts their content away from what attendees really want. Commercial interests that inject their own self-promotion into the proceedings often financially underwrite these events. The effects of commercial sponsorship can be relatively benign—for example, displaying company logos on conference materials and in conference spaces. But sponsorship can also lead to serious distortion of the conference program. For example, sponsors may obtain prominent placement in the presentation schedule, amounting effectively to a paid promotional opportunity for the company, or they may be able to effectively censor the inclusion of subjects or sentiments that are at odds with their point of view.

> ". . . in several dozen symposiums during the weeklong meeting, companies paid the APA [American Psychiatric Association] about $50,000 per session to control which scientists and papers were presented and to help shape the presentations."
>
> —*"Industry Role in Medical Meeting Decried," Washington Post, May 25, 2002*

Conference form

Currently, traditional conferences make up the vast majority of conferences held. A traditional conference's format is determined by its program and schedule, which are planned by the conference organizers well in advance of the actual conference. The conference program announces who will speak, on what subjects, when, and for how long. Potential participants are so used to having this level of detail provided in advance that their decision to attend is based principally on the contents of the advance conference program.

In contrast, alternative conference process models support attendee input into what happens at the conference. This is usually done during the conference, though in some models participants suggest or offer topics of interest prior to the conference to provide a jumping-off place at the start of the conference. Although there are many similarities and overlaps, as we'll see, each alternative conference model implements an attendee-driven conference in its own unique way.

CHAPTER
3

What's Wrong with Traditional Conferences?

Four assumptions of a traditional conference

Four key assumptions lurk behind the traditional conference format—assumptions so deep-seated that they go unquestioned by most conference organizers. These assumptions embody, and consequently help perpetuate, a distorted and outdated way of thinking about conference purpose and structure, leading to a conference model that, as reported by a majority of my interviewees, does not well serve today's conference attendees.

Let's look at these assumptions.

Assumption #1. Conference session topics must be chosen and scheduled in advance.

During my conference experience interviews, I asked the following question:

> "Most conferences have a conference schedule and program decided in advance. How would you feel about a conference where, at the start, through a careful conference process, the attendees themselves determine what they want to discuss, based on what each person wants to learn and the experience each attendee has to share?"

Forty-five percent of my interviewees were unable to conceive of a conference that did not have a schedule of conference sessions decided on and circulated in advance.

The most common response was that the interviewee wasn't sure she'd want to go to such a conference without knowing what was going to happen there.

The next most common response was that the idea sounded great/interesting/intriguing, but the interviewee had no idea of how one would create a relevant conference program at the start of the conference.

Suspend disbelief for a moment, and assume that at the start of a conference it is somehow possible to use available resources to create a conference program that reflects actual attendee needs. Imagine attending such a conference yourself, a conference tailored to *your* needs. (You might want to reflect on how often this has happened for you.) Wouldn't it be great?

The peer conference model described in this book does indeed build a conference program that automatically adjusts to the actual needs of the people present—we'll see how later.

What is the origin of the assumption that a conference program must be pre-planned? Perhaps it arose from our experience of learning as children, from our teachers in school who knew or were told what we were supposed to learn following a pre-planned curriculum. Certainly, if one thinks of conferences as trainings by experts, a pre-planned schedule makes sense. But conferences are for adult learners, and adults with critical thinking skills and relevant experience can learn from each other if they are given the opportunity. We'll see that there are ways of putting conference attendees in charge of what they wish to learn and discuss. But this cannot be done effectively if a conference's program is frozen before attendees arrive.

Assumption #2. Conference sessions are primarily for transmitting pre-planned content.

The three communication modes used among a group of people are *one-to-one* (individual conversations), *one-to-many* or *broadcast* (presentations and panels), and *many-to-many* or *conferring* (discussions). Traditional conference sessions are predominantly one-to-many, with perhaps a dash of many-to-many at question time.

One-to-one conversations are infinitely flexible; both participants have power to lead the conversation along desired paths. Many-to-many conversations are powerful in a different way—they expose the participating group to a wide range of experience and opinions.

In contrast, one-to-many communication is mostly pre-planned, and thus relatively inflexible if the presentation involves a passive audience. At best, a presenter may ask questions of her audience and vary her presentation appropriately, but she is unlikely to get accurate representative feedback when her audience is large. Some presenters are skilled at creating interactive sessions with significant audience participation, but they are the exception.

Presentations and panels are appropriate when we are training, and have expert knowledge or information to impart to others. But with the rise of alternative methods for adults to receive training—reading books and articles, watching recordings of presentations, downloading answers on the Web—what can't be replicated at a face-to-face conference is the conversations and discussions that occur. So why do we still cling to conference sessions that employ the one communication mode for which a variety of alternatives can substitute?

Assumption #3. Supporting meaningful connections with other attendees is not the conference organizers' job; it's something that happens in the breaks between sessions.

People are impressed when I tell them that on arrival, peer conference attendees are immediately given a face book that includes photographs, names and contact data, and additional pertinent information about each participant. They tell me that it's rare to receive such a document at conferences. It's sad that conference organizers don't bother to provide this basic tool for learning about fellow attendees. (Perhaps it's not too surprising, since an attendee face book is not mentioned in any book on conference management I've read.) The absence speaks volumes about the lack of support for attendee interaction at traditional conferences.

Typically, support is limited to providing meals and social events where people can mingle. Attendees are left to their own devices to learn who else is at the conference, to seek out interesting people, and to introduce themselves to others. All these barriers must be surmounted before conversations and discussions can occur. Consequently, attendees who are new to a conference are disadvantaged compared to the old-timers who already know other participants, reinforcing the formation of cliques.

It doesn't have to be this way. Actively supporting useful attendee connections is an integral part of every peer conference. When the information, openings, and opportunities needed to meet like-minded attendees are provided, not only during session breaks but also as part of the formal conference structure, it becomes attendee-centered rather than session-centered, greatly increasing the intimacy and enjoyment of the event.

Assumption #4. Conferences are best ended with some event that will hopefully convince attendees to stay to the end.

How to end a conference? Trainings and conferences that professionals must attend to maintain certification can close with the triumphant presentation of certificates of completion or attendance, but other traditional conferences have no such obvious conclusion. All too often, the conference finale is manufactured: an awards ceremony, a closing keynote, a fancy dinner, a raffle, a celebrity speaker, or some combination thereof.

The reason for this artificiality is simple: Traditional conferences that are not training-oriented don't provide any kind of progression through their theme. The sequence of session topics is guided by logistical, political, and speaker availability considerations, rather than logical flow. One session doesn't follow from another. Such a conference doesn't have a beginning; how can we expect it to have an end?

> " 'We know that people will be strong in the beginning of the conference, so we anchor the keynote speaker at the end so attendees will stay,' says Karen Malone, Vice President of Meeting Services for the Chicago-based Healthcare Information and Management Systems Society."
>
> *—Jennifer Nicole Dienst. Meetings and Conventions Magazine, November 2007*

Some conferences dispense with the pretense of closure. This at least is honest, though the effect of "transmit content, go home" is somewhat blunt.

In contrast, peer conferences provide a progression, not through content, but through increased attendee connections as the conference proceeds. Two closing "spective" sessions build on the generated intimacy to provide a powerful and appropriate conference ending.

Predetermined content

Sometimes a trusted colleague will tell you about a conference you've never attended. *You really should go—it's a great fit for you. I've been the last five years and I wouldn't miss it.* Or, *I went once, never again. Badly organized, lousy location, sessions that weren't as advertised, and I didn't meet anyone who does what we do.* If you are lucky enough to get an evaluation from someone whose judgment you trust, this may be all you need to determine whether you should attend a conference.

Otherwise, how do you decide to attend a particular conference? Well, it seems obvious that you'd want to know in detail what the conference is about before you decide to spend valuable money and time on it. And what better way to find out than to obtain the pre-conference program and scan the lists of scheduled sessions. The more detail the better. *Aha, there's a presentation that sounds really appealing. And maybe I'll like that one. Hmm, nothing of interest on Monday afternoon, but perhaps I can do some sightseeing then.* Eventually you decide to go, or not. Simple. Reasonable. How else could you decide?

Access to this kind of information certainly makes sense when deciding whether you should attend a traditional conference. Since it's rare to find that dream conference where an appealing session is scheduled during every conference hour every day, perusing a pre-conference

Choice

For ten years I taught computer science at Marlboro College, a wonderful tiny liberal arts college in southern Vermont. Unlike most schools, Marlboro has almost no course requirements (a demonstrated ability to write with clarity being a notable exception), with students creating a "plan of concentration" for their last two years. Students' study culminates with an examination of their body of work by faculty members and an outside examiner expert in their chosen field, a process very similar to a master's level thesis defense. Because of the school's unusual learning format, students are essentially free to choose freshman and sophomore courses based on their interests rather than on degree requirements.

At the start of my seventh year of teaching, I thought I was finally becoming a half-decent teacher. So I was surprised and depressed by the atmosphere in my larger-than-usual fall semester introductory class. Students seemed distracted, homework was perfunctory, and getting classroom discussion going was like pulling teeth. Every class has its own personality, but I'd never experienced a class like this one. Was it me? Had I regressed to my early years of bumbling teaching? I didn't think so. Perhaps it was the students?

I soldiered on for a few weeks; the class environment stayed grim. So one day I summoned up my courage and asked my students about the class. I extracted the information that they thought the content was at the right level, but they just weren't that interested in it.

"So," I asked, "why did you sign up?" And finally the truth came out. The school had recently created a joint degree program with another local college. This joint degree program had requirements, one of which could be satisfied by taking my class. Unlike any class I'd previously taught at Marlboro, about two thirds of the students were in my class because they saw it as the easiest way to satisfy a degree requirement. The dead atmosphere I'd experienced was because a majority of my students didn't want to be there.

Unfortunately, this knowledge didn't make teaching the class any easier. But I did realize how lucky I was to have students in my college classes who, most of the time, were there because they wanted to be. And I came to appreciate the dedication of the vast majority of teachers who don't have this advantage.

During my interviews, it became clear that many traditional conferences are "have-to's" instead of "choose-to's." When people attend conferences to fulfill continuing education requirements or because the boss said so, all other things being equal, the conference atmosphere suffers, just as my class environment suffered when students had to attend. One of the reasons that peer conferences work well is that, with few exceptions, *attendees have chosen to be there*. And that can make a big difference.

schedule helps you figure out what proportion of the conference program is likely to be of interest. (Provided that the conference program doesn't mislead, which, as we've seen, is not uncommon.)

But behind this thinking hides a big assumption. To see it, let's first go over how a traditional conference program is developed. Usually, a program committee, representing (hopefully) the conference constituency, convenes long before the conference and decides on the conference structure and content. Formal academic conference program committees often issue a call for papers, with the conference content and presenters determined through who responds with what content, filtered through some kind of review process. Other program committees may decide on a list of hot topics and then go after big names who can present on them. Slowly a raft of sessions is assembled and scheduled, gaps filled, and the conference program takes shape.

Predicting what attendees want—and getting it wrong

For the last 15 years, I've been in a unique position to determine just how well the above process predicts and serves up the content that attendees want. Because what happens at a peer conference accurately reflects the participants' needs and wants, it has been possible for me to compare the pre-conference program predictions of the conference organizers with the actual programs that were developed by attendees.

The results of this comparison are sobering. Although, as you'd expect, some conference committees are better predictors than others, when I've compared program committee forecasts of hot topics with those that attendees actually chose, *I've found that even the best program committees predict less than half of the session topics chosen at the conference*.

This dismal showing may surprise you. I suspect that the majority of conference organizers will be dismayed by this finding, and will question its accuracy. After all, many traditional conferences receive highly favorable attendee evaluations—how can favorable reviews be reconciled with such a poor match between content offered and content desired?

One reason is that seasoned attendees' expectations for a conventional conference are, sadly, not very high. If they have never experienced getting more than half their concerns addressed, attendees will set the bar at that level, and define as successful a conference that meets this standard.

However, there are several other important reasons why peer conferences are so much more successful than program committees at generating the best conference topics.

Uncovering the unexpected

At every peer conference I've facilitated, attendees suggest unexpectedly popular topics during the conference roundtable that is the first step of the peer conference process. These are topics that were off just about everyone's radar, including the steering committee's. Usually these topics arise from expertise casually shared by an attendee, who often has no idea that others would be interested in her experience and want to discuss it further. I have seen these topics turn into informal presentations or panels attended by half or more of the attendees.

Although program committees sometimes make well-meaning attempts to poll attendees about potentially appealing topics to incorporate into a traditional program, I've found in practice that few attendees expend the time and energy to suggest subjects they'd like to see covered at an upcoming conference. Even if a popular topic is uncovered in advance, it may not be recognized as such by the program committee.

Timeliness

Conference programs developed in advance suffer from the curse of already being obsolete. Typically a multiday conference program will be fixed six months or more in advance. In some fields, a lot can happen in six months. I'm reminded of a conference-planning meeting held when legislation that affected our conference's target audience had just been passed. Everyone felt it was very important that we invite a legal expert to keynote the consequences for our attendees' organizations, so we found a suitable speaker and publicized our program. But by the time the conference was held, eight months later, a host of articles in related trade journals had thoroughly covered the issue, and our keynote covered what had now become familiar ground.

What can you do to ensure that fixed program topics are still relevant by the time your conference rolls around? Not much. I've noticed that sessions on structural issues, like the consequences of legal and accounting rule changes, are more likely to become dated than sessions that cover new approaches or research. But I've had little success over the years in predicting which topics will still be fresh and exciting when the presenter steps up on the stage.

A long lead time between the publication of a conference program and the conference itself also impacts presenters, who are required to turn in session descriptions and handouts months in advance without knowing yet either what their presentation will entail or what might prove pertinent in the intervening months.

Do conferences need to have keynotes?

It's sad that so many conference organizers think that a keynote is an essential part of a conference; that if there is no keynote then the conference is incomplete in some way. This is why keynotes are often unnaturally grafted onto a conference, creating a kind of Frankenstein mutant that roars around with great sound and fury, but is forgotten by all quickly soon after the conference is over.

I think that a conference keynote is appropriate when you can snag a dynamic, engaging, and knowledgeable speaker on a relevant topic that a clear majority of your attendees will find interesting. In my experience, if you start from the premise that you *must* have a keynote, there is a real danger of ending up with a speaker who does not fulfill these criteria.

Finally, if you engage a keynote speaker, have a backup plan. Recently, some conference organizers with whom I was working had a traditional conference keynote speaker cancel just one week before the event, because she was invited to the White House on the day she was scheduled to speak. The ensuing last-minute effort to find a substitute significantly increased the organizers' pre-conference stress.

Hot topics—that aren't

Besides worrying about scheduling topics that have passed their sell-by date by the time the conference is held, you also need to worry about choosing topics that, while seemingly "hot," draw little attendee interest come the day of the presentation. How can this happen? Well, sometimes a topic talked up as the "next big thing" just isn't—it's hype that attendees largely reject, either before the conference or when they get there and discover, outside the formal sessions, that no one else is really interested either.

Topics can also misfire at a conference when they're *too far ahead* of audience needs or interests. For example, this can happen at information technology conferences when new operating systems or software applications are first introduced. Sometimes these products are available well before attendees are interested in or able to purchase or roll out the software for their companies. The lead time required to put a program together further complicates the decision whether to feature such topics at a conference. While an experienced and knowledgeable program committee will help reduce this kind of audience-subject mismatch, it's nearly impossible to prevent entirely.

The case for predetermined content

Predetermined conference content has its place, and there are several situations in which it's entirely appropriate. For example, marketing of a conventional conference often is anchored around one or more big-name presenters. Their presentations, which are often complex multimedia affairs, require plenty of time to prepare—they can't be created on demand at a conference. Speakers with a proven reputation for visionary, dynamic keynotes are usually able to provide a relevant, up-to-the-minute, topical presentation, despite the delay between the time they were booked and the time they speak.

Similarly, conference sessions that provide a well-presented, comprehensive overview of a topic can be very valuable to attendees. Such sessions also need careful preparation, and must be solicited and scheduled in advance.

Some professional and amateur groups would not think of holding a conference where the acknowledged leaders in the field or topic were not given pride of place in the conference program. (Politics is one area that comes to mind; you can probably think of others.) A conference that lacked a program defined in advance is obviously not the best choice here.

Sometimes conferences are organized by a group with a strong agenda of conference activities and outcomes. Political and social activism conferences are obvious examples. In addition, company conferences are often tightly controlled affairs, focused on firing up a sales team or bringing employees up to speed on management's upcoming agenda. Events with such preplanned, action-oriented goals require predetermined content.

Finally, conferences that are clearly marketed as trainings obviously need to provide a comprehensive description of the material to be covered in advance.

However, the fact that so much traditional conference time is taken up with content that is a poor fit to attendee desires is a depressing reality that program committees need to bear in mind. It's my hope that the approach to conference design described in this book will lessen our reliance on predetermined content, and encourage us to create conferences that are designed to respond to actual attendee needs rather than our best guesses as to what they might be.

The new kid on the block: making connections at a traditional conference

Just about everyone who's attended a conference has at one time or another walked into a room full of strangers. Unless you're an extreme extrovert, this can be a daunting experience. Think for a moment about how you like to meet new people. It's easier if you have some kind of opening to start up a conversation. The more people in the room you know, the more

Together, yet alone

In October 1984 I was one of 700 attendees at EDUCOM '84, a conference on information technology in higher education. I had recently started to teach computer science at Marlboro College, a tiny New England liberal arts college, and was looking for professional support and ideas.

Unfortunately, EDUCOM '84 turned out to be a depressing experience for me. The conference sessions focused on the needs of large institutions. Hundreds of people sat around me as we listened to talks on subjects that left me cold, or solutions requiring equipment and staff that I couldn't begin to afford. And there was a strong whiff of "look at all the cool stuff we're doing, bet you can't match this" that I didn't like.

I was sure that there were other attendees like me at EDUCOM '84. But how was I to find them? I tried talking to the people I sat next to at mealtimes. I struck up conversations with my seatmates as we were shuttled to campus tours and off-site demos. I scanned the directory of attendees for people from small schools like mine, and then scanned name badges, hoping to spot them. But I didn't meet a single kindred soul during the entire four-day conference.

Do I blame the folks at EDUCOM for my miserable experience? No. They organized a traditional conference that may have served many attendees well. However, it certainly didn't work for me.

But one good thing came out of my time at EDUCOM '84. I began to wonder whether I could create a conference that better met what I felt attendees needed. I wanted a conference that was responsive to the needs of attendees, encouraged positive attendee interactions, and fostered a spirit of community among those who came.

possibilities exist for you to meet others through your acquaintances' existing connections. When you know no one, you're completely cut off from the connections that already exist in the room.

It's even worse when no one in the room knows anyone else. Everyone then needs to build his or her connections from scratch.

A traditional conference lacks formal opportunities, opportunities that are part of the conference process, for these kinds of introductions to occur. It's hard to go up to a complete stranger and start talking to him. And, with many potential people to talk to, and not enough time to talk to them all, how do we pick whom we'll approach?

Because making connections at traditional conferences can be so inefficient, it's common for people to spend significant time preparing for upcoming potential conference interactions. As the quote at the start of this section recommends, people research in advance other attendees they want to meet, looking for the commonalities that they can use to engineer an introduction and subsequent conversation. Seasoned conference-goers advise new attendees to perfect their "elevator pitch," a 30-second introduction to their work and selves, so that when that all-important person is within range, they are ready to make their best attempt to create a connection.

This is all very well if you enjoy this kind of competitive behavior. In my experience, most attendees don't. Consequently, people make new connections at a traditional conference largely via the combination of chance and a slow increase in familiarity with other attendees. This is a pretty inefficient process.

Sadly, most of my interviewees seemed resigned to the session-centric format of conventional conferences. Although all indicated, one way or another, that making new, significant connections was important, expectations that this would happen were low. People saw making valuable connections as a relatively rare bonus, rather than expecting it as a matter of course.

So how can you find out about people at a conference? How can you discover attendees' backgrounds, interests, and personalities that provide points of connection for you? And how can you bring to light others' experiences that are valuable to you if shared? Read on, and you'll discover how peer conferences actively support all of these attendee needs!

Beginnings and endings

We have come to expect that stories we read will have well-crafted beginnings and endings. If the beginning is poor, we probably won't continue, and if the ending is unsatisfactory we feel profoundly let down. Given that attending conferences may require as much commitment of time and attention as reading a story, why do we accept token beginnings and endings at these events?

> "The reader is by no means obliged to read any story—is seduced, so to speak, into doing so; and, unless he can sense an entertaining half-hour within the first two or three paragraphs, then it is all over with the author . . .
>
> . . . the story ending should have just as critical and painstaking preparation as the introduction or the climax."
>
> —*Elinor Glyn. Beginning and Ending Your Story*

Beginnings

At a minimum, the welcome at a conference should cover the formalities of introducing one or more of the conference organizers or hosts, and sharing necessary logistical information with attendees. Ideally, a welcome should also foster a comfortable atmosphere that reassures people that practical, conference-related needs can and will be taken care of. Once these items are out of the way, a traditional conference starts and sessions begin.

> "Once upon a time . . .
> . . . and they all lived happily ever after."
>
> —*Start and end of innumerable fairy tales*

Unfortunately, such a beginning does nothing to support forming connections among attendees. Consequently, people go to sessions not knowing other attendees, unless they knew them previously. Initially participants are isolated, at best slowly building a network of connections as the conference proceeds, but missing out on the benefits of finding simpatico peers early on.

It doesn't have to be this way. Later, we'll see how peer conferences use an initial *roundtable* to facilitate attendee connections in ways that minimize attendee isolation.

Endings

There will always be logistical reasons—like planes to catch, families to feed, or traffic to avoid—for people leaving events before their formal conclusion. However, a surprising finding from my interviews was the extent to which people either left or wanted to leave a traditional conference before it was over—not for practical reasons but because they had come to the conclusion that it wasn't worth their while to stay. Though personality certainly played a part in the variability of interviewees' responses—several people said that they were incapable of leaving before the end due to the way they had been brought up—the median answer to the interview question *"What is the percentage of the conferences you've attended where you either left before the end (for other than practical reasons) or wished you had?"* was 25 percent!

> "I usually leave when they have that canned stuff at the end."
>
> —*Interviewee*

Perhaps this high level of premature abandonment is not so surprising. First, traditional conferences are disjointed events; unless they are trainings or workshops, sessions tend to lurch from one topic to another with little coherence or progression. As a result, participants tend to decide whether to go to a session based purely on their interest in its subject, rather than considering its contribution to their experience of the conference as a whole. If they decide that the last session holds little interest, they may decide (or wish) to leave early. Second, a majority of my interviewees reported that the subject matter and/or perspective of traditional conferences are frequently misrepresented in conference marketing. This commonly leads to attendees chafing to abandon conferences that they belatedly find not meeting their expectations and needs.

Professional conference planners worry about keeping attendees until the end, and usually suggest scheduling some kind of climactic event to tempt people to stay. When the formal sessions of a conference fail to create an environment where people want to stay to the end, such manufactured closing events can be effective, but that they're used so often is a sad commentary on the level of event commitment generated by traditional conferences.

Read on to learn how peer conferences, by building an environment in which attendees actively participate, create a conference experience so compelling that attendees stay to the end because they don't want to miss a minute!

Passivity

As the home-schooling proponent John Holt pointed out, learning is not a passive process. And yet, the principal advertised activity at conventional conferences is largely passive—namely, sitting and listening to one or more speakers for the majority of each conference session. Even if we put aside attendees' needs for connection at conferences and concentrate on thinking of conferences as an event for learning, a traditional conference assumes this nonparticipative knowledge acquisition model.

> "The most important thing any teacher has to learn, not to be learned in any school of education I ever heard of, can be expressed in seven words: *Learning is not the product of teaching.* Learning is the product of the activity of learners."
>
> —*John Holt. Growing Without Schooling Magazine, No. 40, 1984*

Think about how you learned vocabulary as a child. It was primarily through active immersion in an environment where language was used (typically tens of thousands of words), rather than through vocabulary enrichment lessons at school (typically a few hundred words). In this case, active, interactive learning was far more effective than passive reception of a teacher's lessons. Like learning a living language, social knowledge acquisition requires active interaction with others, not passive reception of information.

> "Recent investigations of learning, however, challenge this separating of what is learned from how it is learned and used. The activity in which knowledge is developed and deployed, it is now argued, is not separable from or ancillary to learning and cognition. Nor is it neutral. Rather, it is an integral part of what is learned."
>
> —*John Seely Brown, Allan Collins, and Paul Duguid. Situated Cognition and the Culture of Learning. Educational Researcher, Vol. 18, No. 1, 1989*

Nothing is required from an attendee at a traditional conference beyond payment of the conference entrance fee. Even conferences created to maintain professional certification rarely require more from attendees than their physical presence. Conventional conference sessions, by tacitly endorsing passivity, drain energy from people who attend conferences with a desire for connection and social learning. We can't force anyone to actively engage at a conference, but I believe that it's possible to provide a structure that encourages and supports participation, and to offer an environment where active involvement is the norm, rather than something for attendees to attempt unaided outside conference sessions.

Size matters

Try this quick experiment. Think of an interesting short topic you'd like to share with other people.

Now imagine sharing your topic with someone and what that would be like. How might the sharing develop?

Next imagine sharing the same subject with 10 people simultaneously. What would that be like?

Finally, imagine the same sharing, but with 300 people simultaneously. What would that be like?

Notice any differences?

You probably found that changing the number of people involved in this simple thought experiment greatly affected your imagined experience. In all three cases you started the same way—with an audience. But as we all know, with another person or a small group, questions can be asked and conversations entered, conversations that can involve everyone present. In other words, the majority of conversations with another person or a small group are interactive, and any initial audience quickly dissolves into a discussion.

> "As the size of a group increases, the connectedness among members decreases, which can lead to increases in social loafing, bystander apathy, and even deindividuation. Larger groups also promote more conformity, since there are more peers to exert pressure on any individual to conform.
>
> On the other side of the coin, the effects of social facilitation increase with group size, and having more members means that there are more opportunities during group discussions to consider more perspectives and more knowledge. Thus, the real issue is not group size per se, but whether a group is managed well enough that its size is an asset rather than a liability."
>
> —*Linda K. Stroh, Gregory B. Northcraft, and Margaret A. Neale. Organizational Behavior: A Management Challenge. Lawrence Erlbaum Associates, 2001*

In contrast, sharing with a thousand people is, fundamentally, a one-way experience. There simply isn't the possibility of significant two-way interaction when a thousand people are listening to you—at best a few questions can supply interaction with a miniscule percentage of your audience. There is no possibility that your audience and you can have a discussion.

These scale-generated differences are large enough that we have separate words for these forms of communication. With a small group, we have a *conversation*. With a larger group, we call our sharing a *discussion*. And with a thousand people, we talk about a *lecture* or *presentation*.

So, how humans communicate varies radically with the size of the group involved. At a conventional conference, the emphasis is on the presentation sessions, where one or two people speak to many. Unless the conference is small, its sessions will be one-way—any conferring will be relegated to the hallways and social events.

How big is big?

How big is the average conference? It depends, of course, on your definition of "conference," but in 2007, according to *Meetings and Conventions Magazine*, an average of 1,440 people attended "association conventions," while "association meetings" had an average attendance of 146.

I am a confirmed small conference-goer, and my interviewees indicated a clear preference for small conferences too. Although I didn't ask specifically about conference size during my interviews, 35 percent of my interviewees indicated a preference for attending conferences with fewer than around 100 attendees.

As you might expect, interviewees who saw conferences primarily as training opportunities seemed unfazed by attending large conferences, while those who looked for connections with other attendees showed a clear preference for small events.

> "The downside of going for size and scale above all else is that the dense, interconnected pattern that drives group conversation and collaboration isn't supportable at any large scale. Less is different—small groups of people can engage in kinds of interaction that large groups can't. . . . You have to find a way to spare the group from scale. Scale alone kills conversations, because conversations require dense two-way conversations. . . . The fact that the amount of two-way connections you have to support goes up with the square of the users means that the density of conversation falls off very fast as the system scales even a little bit."
>
> —*Clay Shirky. A Group Is Its Own Worst Enemy. Speech at O'Reilly Emerging Technology Conference, April, 2003*

What's good about big?

What are the benefits of a big conference? Here are a few.

Big conferences can attract big-name presenters, people you wouldn't otherwise get to see.

Big conferences can include sessions on a wide range of topics, covering anything you might be interested in.

Big conferences, if you already know many of the attendees, give you the opportunity to get together with lots of colleagues or friends at one event.

Big conferences can conjure up big trade shows—all the exhibitors you might want to visit will be in one place.

The crucial question is whether these advantages compensate for the drawbacks of large conferences: the increased difficulty in making meaningful connections, the prevalence of one-to-many sessions with limited opportunities for interaction, and the de-emphasis on developing and transmitting social knowledge. If these deficits become increasingly important to attendees, we can perhaps expect a move toward smaller conferences in the future.

Meeting interesting people at conferences

When I attend a traditional conference, I'm fretting about who I'm missing. No, not my family at home; I'm fretting about missing meeting conference attendees who would be interesting for me to meet, who I'd love to get to know *if only I could figure out who they were*. Even if I can figure out who would be interesting to meet, I then have to find a time and place to meet them, and I also have to come up with a way to introduce myself.

Each of these concerns—who interests me, when can I meet them, where can I meet them, and how do I introduce myself—are obstacles to connecting with interesting people at a conference. Unfortunately, as the size of a conference increases, our ability to meet more people doesn't improve proportionately. As a result, trying to find new people who share specific interests at a large general conference is a daunting task.

Saving graces

Over time, many organizers have become aware of the limitations and frustrations of the traditional conference format, and have, to their credit, attempted to add ways for attendees to propose sessions and interact outside standard predetermined conference sessions. Three common formats are poster sessions, birds-of-a-feather sessions, and facilitated small group discussions. Although these approaches often appear to be uneasily grafted onto the conference, they are worth discussing for two reasons: First, they demonstrate the desire of participants for more control over their conference experience, and second, they show the limitations of attempting to provide what attendees want while clinging to traditional conference process. I've also added a description of the Gordon Research Conferences, which are designed to minimize some of the difficulties posed by the conventional conference format.

Poster sessions

Poster sessions originated at academic conferences as an opportunity for individual attendees to present their research to other attendees. Presenters stand next to a poster summarizing their work and present to any interested attendees. Nowadays, poster sessions are frequently used informally to display general information and invite viewers to ask more detailed questions of the person who created the poster. Because posters are prepared before the conference, poster sessions provide a somewhat makeshift method of broadening available content, following the usual teacher-to-student(s) model. Control over content can range from requiring preapproval for each session to an "anything goes" philosophy. The sessions are often held during meal breaks, though they sometimes merit their own conference time slot.

Adding a poster session to a conference program is a tacit acknowledgment that attendees possess potentially useful expertise and experience not available through the traditional conference sessions. A poster session offers participants a genuine opportunity to contribute, reducing the customary distinction between presenters and audience. Because the session supplies an intimate, usually one-to-one, interactive format, it provides useful feedback to the poster presenters: Are conference-goers interested in what I have to say, and, if so, what do they think about it? At a large conference, poster sessions may be the most practical method to expand the available content beyond the fixed program.

Unfortunately, poster sessions are a fairly crude way to democratize and extend a conference. They require would-be presenters to create session materials and dedicate conference time to standing by their display with no guarantee of interaction with other attendees. It can be disconcerting to make this commitment and receive limited attention. Even when like-minded souls appear, they may well arrive at different times, offering little opportunity for a group discussion on the topic. Given these limitations, it's not surprising that poster sessions have a reputation as second-class presentation opportunities for lower status attendees.

Birds-of-a-feather sessions

Birds-of-a-feather sessions, commonly known as BOFs, offer attendees an opportunity to create their own session on a topic of their choosing. Typically, the conference organizers supply a

Gordon Research Conferences

The Gordon Research Conferences (GRC) started in 1931 as a way to "bring together a group of scientists working at the frontier of research of a particular area and permit them to discuss in depth all aspects of the most recent advances in the field and to stimulate new directions for research." Currently the organization holds 150–200 conferences annually. The GRC model has several attractive aspects that minimize some of the unwelcome effects of traditional conference process that I've described in this chapter:

- Conferences are small (generally fewer than a hundred participants).
- Attendees are expected to participate actively and meaningfully in discussions.
- All information presented and discussed at the conference is considered private.
- Presentations are held in the mornings and evenings, with afternoons available for informal discussions.
- Presentations are short (15–20 minutes) with time scheduled for discussion, and discussant leaders provided.
- Invited speakers are encouraged to stay for discussions after their presentation. (They don't receive expense reimbursement unless they stay for at least 24 hours after their talk!)

These features promote active involvement by attendees, confidentiality (through the privacy requirement), and the flattening of hierarchy (by keeping speakers around and offering plenty of time for informal discussions).

Peer conferences, by contrast, provide a more flexible conference format, and are less narrowly focused and more tolerant of a wide range of attendee experience. Nevertheless, the GRC conferences, now in existence for over 75 years, provide an excellent strategy to address weaknesses of conventional conference process.

time or place for attendees to announce or post discussion subjects. The resulting sessions are usually scheduled during meals or evening free time.

BOFs are valuable additions to traditional conferences. Because they normally use a discussion format, they provide relevant, small group, interactive experiences. BOFs allow people to find and informally connect with others who share their interests, broadening their circle of conference acquaintances in the process.

Although BOFs appear to offer a conference format that is responsive to real-time attendee needs, like poster sessions they sometimes provide an inferior and frequently frustrating experience. Crucially, apart from providing a way for BOFs to self-announce, they are not otherwise supported by conference staff. As a result, it's hard to know how well attended a proposed BOF will be. Sign-up sheets are a useful but not reliable indicator of popularity.

More than once I've had to decide between attending an evening BOF or going out to dinner with a group of friends, chosen the BOF, and waited around only to have one other person turn up. Another consequence of keeping BOFs outside the traditional conference support structure is that any facilitation is strictly *ad hoc*. This can lead to BOFs being hijacked by a minority of vocal extroverts who may take over or steer the discussion in ways that a majority present don't want.

As we'll see later in Chapter 7, *the peer conference process optimizes the BOF experience*, providing time, space, and support for relevant, interactive conference sessions.

Small group discussions

My interviewees often cited the inclusion of small group discussions, usually called *discussant* or *breakout sessions*, as the saving grace or highlight of traditional conferences. It's clear that many participants hunger for small, focused group discussions of pertinent topics, and it's sad that most traditional conferences don't set aside time for such sessions. Small group discussions, usually run by a panel of experts or conference speakers, are *interactive* sessions where the central goal is to promote and support discussion between attendees. These sessions may be tightly focused around a set of papers or presentations, or loosely structured around one or more introductory themes.

For small group discussions to be successful, they must be well facilitated, and the topics and questions must excite and be pertinent to the people present. When these conditions occur, small group discussions are like peer sessions, the core of a peer conference. But when a small group discussion's predetermined topic or focus does not match attendees' needs, the resulting session disappoints. As we'll see, a peer conference avoids this outcome by generating the best topics to spark attendee interest and involvement.

CHAPTER 5 The Peer Conference Alternative

So far in this book I've supplied a steady stream of tantalizing hints and imputed claims about this thing I call a peer conference. In this chapter I'll explain in general terms how peer conferences overcome the deficiencies of traditional conferences that I've previously cataloged. The following three chapters cover peer conference process in more detail.

Definition, assumptions, end goals, and process goals

Let's start with the definition and basic premises of peer conferences.

Definition

A peer conference is a set of process tools used by a group of people with a common interest who want the experience of a conference that's intimate, meaningful, and useful to each person who attends.

Assumptions

We attendees collectively:

- Possess a tremendous variety of experience and expertise;
- Create the conference during the conference;
- Own the conference; and
- Value reflecting as a group on our conference experience.

Each of us:

- Affects what happens at our conference, for ourselves and for others;
- Is responsible for our own conference experience;
- Needs to share why we came and what we want to have happen;
- May have experience or expertise that is valuable to other attendees;
- Has something to learn from other attendees;
- Longs to invest our energy in things that matter; and
- Values reflecting personally on our conference experience.

Sharing our experience, expertise, and stories with our peers feels good.

When the right process is provided, the right content and the right way to share it will emerge.

End goals

The primary goal of a peer conference is to create the best possible conference for each individual attendee.

A peer conference maximizes participant interaction and connectedness.

Community-building and future group initiatives are not primary goals of a peer conference; rather, they are welcome potential outcomes.

Process goals

We create the best possible conference for each individual attendee by:

- Creating an environment:
  - where attendees get introduced to one another;
  - where it is safe for attendees to share experience, expertise, and stories;
  - that encourages interaction, despite differences in individuals' experience and expertise;
  - that encourages attendees to stretch and grow; and
  - that encourages and supports fun.
- Providing flexible structure that allows:
  - learning about other attendees;
  - uncovering individual attendee needs;
  - uncovering available experience and expertise; and
  - matching discovered needs with discovered experience and expertise.

- Offering appropriately sized sessions to support conferring as well as presenting.
- Providing facilities, time, a schedule, and facilitation for the sessions that attendees want.
- Holding our conference in enjoyable surroundings.
- Providing supported opportunities for individual and group reflection, introspection, and looking forward.
- Supporting group growth and the appropriate creation of new activities and events.

A peer conference provides just the right amount of process, structure, and support, and then gets out of the way.

What subject and how long?

Here are some broad answers to basic questions about the scope of peer conferences.

A peer conference can be about anything—a specific subject, a broad topic, an issue—that captures the interest of a group of people. Many peer conferences focus on professional themes, but peer conference process works just as well with community-based issues or personal interests. Here are a few examples of peer conference topics:

- Municipality facilities maintenance
- Building sustainability in our community
- Beer brewing
- Pharmacy management
- Providing childcare services
- Credit counseling using volunteers
- Amateur photography
- Working to reduce discrimination and prejudice in *XYZ* county

While some go to traditional conferences because it's expected of them or required, peer conferences are for people with a personal interest in the conference topic. Peer conference process encourages and supports engagement, guiding formerly passive attendees into active participation. As with any conference, an attendee who is disengaged or distracted may receive little benefit from the event, but a peer conference has a much higher likelihood of capturing the interest of even the most jaded conferee.

Peer conferences are small by traditional standards, with between 20 and 100 attendees. The initial roundtable process is practicable with up to 60 participants per roundtable session. When necessary, two simultaneous roundtables can be used without significantly impacting the intimacy and interactivity that exists at the center of a successful peer conference.

Developing the necessary trust, knowledge of other participants, and resulting connectedness, as well as supplying adequate opportunities for introspection and reflection at a conference takes time. Although I have held peer conferences in a single day, such events invariably feel rushed. Using a schedule that starts in the afternoon and lasts at least until the end of the following day provides the right amount of time for a short conference. At the upper end, peer conferences can run as long as three and a half days, providing ample time for attendees to explore multiple issues around the central topic.

An introduction to peer conference process

While peer conference process is certainly not infallible, I've found it offers a much better chance than a traditional conference of turning a conference *attendee* into a conference *participant*. Here's the big picture.

Think of a peer conference as a process, not an event—the *how* of a peer conference generates the *what*. Out of the process comes relevant learning, meaningful connections and interactions, and, sometimes, the creation or strengthening of a community.

A peer conference is a way for people to connect with each other around a common topic, face to face, in ways that are maximally useful and meaningful for each person. Peer conference process facilitates participants' connections by providing a supportive framework in which they can occur, leaving the nature and details of the connections to the people involved.

Providing a supportive framework without encroaching on the specifics of the interactions is important because people have such a wide variety of reasons for wanting connection. They may want to:

- Learn
- Meet other people who share their interests
- Get answers to questions
- Share useful or important information with others
- Build a community of people with whom they have something in common
- Build community around social or political action
- Grow
- Have fun
- Reflect on what they have learned and shared

By focusing on process that facilitates these reasons for connections, rather than a prescribed set of content-driven sessions, peer conferences free participants to ask for and get what they want from the event.

Peer conference process components

Peer conference process is divided into three phases, which I've imaginatively labeled "*Beginnings*," "*Middles*," and "*Endings.*"

Beginnings

The beginnings of a peer conference are rooted in its opening session, the roundtable, which early on establishes a common framework for a safe and intimate conference environment, and then provides equal time for each attendee in turn to share his answers to three questions: how he came to the conference, what he wants to have happen during the event, and what experience or expertise he has that others might find useful.

Feeling safe is a prerequisite for attendees to be open to intimate sharing and making connections. So a peer conference starts by supplying a set of ground rules that define a supportive and safe environment. After these rules are explained, attendees commit to them, establishing a secure and comfortable environment for what is to come.

The roundtable is the only time when each attendee is asked and expected to share publicly. Roundtable sharing sets up the necessary conditions for subsequent interactions and connections between participants, and is important for many reasons. It makes a clean break with the convention that at conferences most people listen and few speak, setting up an alternative paradigm for the rest of the conference. It gives everyone the experience of speaking to the group, allowing people who might rarely or never open their mouths discover that it's not as bad as they feared (hey, they think, at least *everyone* has to share). It provides participants with the rich stew of ideas, themes, desires, and questions that is bubbling in peoples' minds. And it exposes the collective resources of the group—the expertise and experience that may be brought to bear on the concerns and issues that have been expressed.

As you might expect, during the sharing at a roundtable, participants pick up a great deal of useful information about other attendees, as well as the range and intensity of topics and questions on peoples' minds. What is less obvious is what happens as attendees experience and practice sharing while supported by the framework of the conference ground rules—the intimacy, respect, comfort, and excitement that develops as they begin to make meaningful connections with the people they are with.

Middles

Most of the time that attendees are together is spent in the Middles of a peer conference. The Middles include a set of short processes that turn the information and connections gleaned from the roundtable into a schedule of appropriate conference sessions, which are followed by the sessions themselves.

Peer conferences use a publish-and-filter model to determine conference sessions. First, attendees suggest session topics, posting them on blank sign-up sheets displayed in a common area. Second, people sign their names under titles of sessions they are interested in attending. They also indicate whether they could potentially help with a session, perhaps as a facilitator, presenter, or scribe.

Finally, a group of volunteers uses the sign-up sheets to determine the most popular viable topics and the appropriate session form. The chosen sessions are then scheduled, and the resulting conference program circulated to attendees.

Unlike traditional conference sessions, peer conference sessions are informal. Because session topics are determined at the conference, subsequent presentations or panels are nearly always *ad hoc* events. But informal doesn't mean disorganized. To support good process at peer conference sessions, all attendees receive a concise handout that explains how sessions work, and every session is assigned a facilitator.

Endings

Traditional conferences rarely provide useful closure, at best offering a symbolic dinner or a hopeful-incentive-to-stay-to-the-end keynote speaker. In contrast, peer conferences offer two closing sessions that build seamlessly on what happened during the conference.

The *personal introspective* closing session has two parts, the first private, the second public. To start, attendees answer five questions that encourage individual reflection on their conference experience and the development of plans for consequent action. Then, attendees are given the option to share some or all of their realizations and plans with the other attendees. An introspective's personal work fashions a natural bridge between attendees' conference experiences and their post-conference life and work, while the subsequent public sharing further enriches and deepens group bonds.

The second closing section, the *group spective*, gives participants an opportunity to discuss the conference and explore appropriate options for future group activities. Because every group of people has unique needs, desires, and energy, group spectives vary between events more than any other peer conference session, requiring careful facilitation using a toolbox of group process techniques described in detail in Part III of this book. Group spectives offer participants the chance to create their own collective future, extending the reach of the conference beyond the moment when people leave.

Unlike the close of a traditional conference, these two sessions provide support for building a coherent transition from the formal end of the peer conference to individual and collective future actions and events.

Graduate student story

I've been a teacher at various times in my life, including a 10-year spell teaching college-level computer science. I've never had any teacher training. I was a poor teacher when I started; I've gotten better over the years, though there's still plenty of room for improvement.

Conferences are one of the principal conduits for adult continuing education and learning. I'm talking about teaching in this chapter because, not surprisingly, there's significant carryover between the way we've been taught in school and the way we expect to receive knowledge at traditional conferences.

Sitting on a bookshelf in my office is a large blue cloth hardcover book. I wrote every word in it, and painstakingly hand-lettered every mathematical equation it contains with a Rapidograph pen. On the basis of this book, and a two-hour thesis defense, at the age of 25 I was considered fit to be awarded a Ph.D. in elementary particle physics.

I have a confession to make.

When I wrote that book I didn't understand everything I wrote.

How did this happen?

During my first two years as a postgraduate student I attended various particle physics courses. These classes were small, with fewer than 10 students, even though they included graduates from several London universities. Because I had transferred from another school, I didn't know any of the other students, and didn't socialize with them much. We sat in tiny classrooms, while a harried professor took us through what we were supposed to know in order to be awarded an advanced degree.

We've all had the experience of listening to a teacher in class and not understanding something he has said. Perhaps the teacher asks if there are any questions. At the moment you have to decide—do you admit that you're lost and ask the teacher to explain again, or do you say nothing? If you say nothing, is it because you are convinced that you will never understand what is going on, or are you hoping that all will become clear shortly, when the lesson continues?

In those days it was rare for me to give up on anything I was being taught. On the other hand, I was reluctant to display my apparent ignorance when I couldn't understand something during a class. In my experience, I would either "get it" later on, or nobody would understand and the teacher would eventually discover this and assume he hadn't been clear himself. For over 20 years this approach had worked for me. But toward the end of my second year I was understanding less and less of a mathematics course I was *taking. The professor seemed to be going through the motions—he asked few questions, and there was no homework. Elementary particle physicists are either mathematicians or experimentalists, and I was the latter, working on a large-scale neutrino experiment at CERN, the European laboratory for particle physics, so my lack of mathematical understanding was not affecting my research work. But the experience was disconcerting. And, as the semester went on, the percentage of class material I understood gradually declined.*

One day, our teacher announced that we would be studying Green's Functions, a technique used to solve certain kinds of equations. After the first 20 minutes of the class I realized that I understood nothing of what was being said, and that I was at a crucial turning point. If I kept quiet, it would be too late to claim ignorance later, and it was likely I would not understand anything taught for the remainder of the semester. If I spoke up, however, I was likely to display my weak comprehension of everything that had been covered so far.

Looking around, I noticed that the other students seemed to be having a similar experience. Everyone looked worried. No one said a word.

The class ended and the professor left. I plucked up my courage and asked my classmates if they were having trouble. We quickly discovered, to our general relief, that none of us understood the class. What should we do? Somehow, without much discussion, we decided to say nothing to the teacher.

The class only ran a few more weeks, and the remaining time became a pro forma *ritual. Did our teacher know he had lost us? I think he probably did. I think he remained quiet for his own reasons, perhaps uncaring about his success at educating us, perhaps ashamed that he had lost us.*

When I didn't speak up, I chose to enter a world where I hid my lack of understanding from others, a world where I was faking it.

For the next two years I analyzed experimental results and compared our findings with theoretical physicists' predictions. I understood the experiments, but not all the mathematics. And that's why I didn't understand some of those laboriously scribed equations in my thesis.

This confession of mine doesn't affect the scientific significance of the work I did. The mathematicians who supplied me the equations understood them, and I was comparing their predictions to experimental results that I understood. What is significant is that I chose to sit through meaningless classes rather than admitting my ignorance. That

(continued on following page)

> *mathematics course failed to provide me with a workable learning environment, not because it didn't contain useful content, but because its structure and context made it easier and safer for me to be silent.*
>
> *Probably you've had a similar experience; a sinking feeling as you realize that you don't understand something that you're apparently expected to understand, in a context, perhaps a traditional conference, where nonresponsiveness is the norm. It's a brave soul indeed who will speak out, who is prepared to admit to her classmates, teacher, or conference presenter that she doesn't get what's going on. Did you? Do you?*

A community of learners

At a well-planned traditional conference, conference planners invest significant time and effort before the conference attempting to determine who can potentially provide an "above average" contribution on the conference subject. These people are asked to be presenters and panelists. Everyone else who attends becomes the audience. By the time the conference starts, this distinction between the knowledge "haves" and the "have-nots" has been locked into the conference program.

> "Communities of practice are groups of people who share a concern or a passion for something they do and learn how to do it better as they interact regularly."
>
> —*Etienne Wenger*

In contrast, peer conferences make no such *a priori* assumptions about who is a teacher and who is a learner. Rather, they promote an environment in which teaching and learning are ever-fluid activities; the teacher at one moment is a learner the next. Sometimes, everyone in an interaction is learning simultaneously as social knowledge is discovered, constructed, and shared.

Peer conferences aren't built on the expectation that every attendee will significantly contribute to the event. There are always participants who have much to offer, intermingled with those who, for whatever reason, add little to the communal pool of relevant knowledge and experience. Rather, peer conference process provides the opportunity for anyone to contribute, perhaps unexpectedly, but ultimately, usefully.

Peer conferences are tools for what educational theorist Etienne Wenger calls *communities of practice*, as defined by three key elements: a shared domain of interest; a group whose members interact and learn together; and the development of a shared body of practice, knowledge, and resources. Such entities can take many forms: artists who rent a communal space to work and grow together, programmers linked online for the purpose of creating or improving public domain software, or a group of people with a common professional interest meeting regularly over lunch to swap ideas and experiences.

In my experience, peer conferences are high-quality incubators for communities of practice—they provide a wonderful way for a group of people to explore the potential for creating an ongoing community. The majority of peer conferences that I have facilitated have turned into regular events, but, even when this does not happen, a conference inevitably leads to new long-term relationships and communal projects of one kind or another. Conversely, communities of practice can use regular peer conferences to effectively explore and deepen their collective learning and intragroup relationships.

An environment for taking risks

Think of the last time you were with a group of people and made a stretch to learn something. Perhaps you admitted you didn't understand something someone said, wondering as you did whether it was obvious to the others present. Perhaps you challenged a viewpoint held by a majority of the people present. Perhaps you proposed a tentative solution to a problem, laying yourself open to potentially making a mistake in front of others. These are all examples of what I call *risky learning*.

> "Only those who will risk going too far can possibly find out how far one can go."
>
> —*T. S. Eliot. Preface to Transit of Venus: Poems by Harry Crosby. Black Sun Press, 1931*

Whatever happened, was the learning opportunity greater compared to *safe learning*—the passive absorption of presented information?

Traditional conferences discourage risky learning. Who but a supremely confident person (or that rare iconoclast) stands up at the end of a presentation to several hundred people and says they don't understand or disagree with something that was said? Who will ask a controversial question, share a problem, or state a controversial point of view, fearing it may affect their professional status, job prospects, or current employment with others in the audience? People who brave these concerns are more likely to be exhibiting risky behavior than practicing risky learning.

Peer conferences provide a safe and supportive environment for risky learning in several ways.

First, and perhaps most important, is the commitment attendees make at the very beginning of the conference to keep confidential what is shared. This simple communal promise generates a level of group intimacy and revelation seldom experienced at a conventional conference. As a result, participants are comfortable speaking what's on their minds, unencumbered by worries that their sharing may be made public outside the event.

Second, because peer conferences are small, there is an increased chance that attendees will be the sole representatives of their organizations and will feel comfortable fruitfully sharing sensitive personal information to their peers, knowing that what is revealed won't filter back to coworkers. Even when others are present from the same institution, the intimacy of a peer conference usually helps to develop amity and increased understanding between them.

> "Learning is also a risk-taking business since as we learn we question our past knowledge and even our previous attitudes, beliefs, values and emotions so that teachers need to provide a safe environment for risks to be taken. It is crucial to all adult learners that they feel safe and supported as they launch out into the deep and learn new things."
>
> —*Peter Jarvis. Adult Education and Lifelong Learning: Theory and Practice. Routledge, 2004*

Third, peer conference process makes no presuppositions about who will act in traditional teacher or student roles during the event, leading to fluid roles and learning driven by group and individual desires and abilities to satisfy real attendee needs and wishes. In an environment where it's expected that anyone may be a teacher or learner from moment to moment, participants overcome inhibitions about asking naive questions or sharing controversial opinions.

Finally, peer conference facilitators model peer conference behavior. When they don't know the answer to a question they say "I don't know." When they need help they ask for it. When they make mistakes they are accountable rather than defensive. Consistently modeling appropriate conduct fosters a conference environment conducive to engaged, risky learning.

Ultimately, each attendee decides whether to stretch. But peer conferences, by supplying optimum conditions for risky learning, make it easier for participants to learn effectively.

Ask, don't tell

Right before each one of my early peer conferences, the same disturbing thought ran through my mind. What if everyone came expecting a traditional conference program to be given to them, just like every other conference they'd ever attended, and no one volunteered topics they wanted to talk or hear about? I was concerned enough about this embarrassing possibility to ask steering committee members to think of presentations they could give if attendees failed to have any ideas of their own.

After a few years I stopped worrying. No one showed difficulty coming up with a list of topics they'd like to learn about or discuss. In fact, just about everybody seemed to be surprised and pleased to be asked. And what's more, even when their desires were not fulfilled at the subsequent conference (no, you really can't please everyone), their disappointment was clearly mollified by the information they received about why their coveted session(s) didn't take place.

> "Many times people do not voice their expectations."
>
> —*Virginia Satir et al. The Satir Model. Science and Behavior Books, 1991*

It's not surprising that giving attendees the opportunity to ask for what they want to have happen is an option conspicuously absent from traditional conferences, which have no way to follow up on the suggestions and requests that would be made. Sadly, instead, conference organizers tell attendees what they will be getting. In contrast, a peer conference encourages attendees to share what they want to have happen, and then provides a supportive process that generates appropriate sessions on the popular topics.

In my experience, Virginia Satir was right—people often don't express their expectations. But we needn't make it any harder for them by not even asking what they want.

Rich interpersonal process

Here's what happens interpersonally *officially* at a peer conference: Participants discover and share the interests, needs, and knowledge of each attendee; the conference supplies tools for people to determine via a shared public space what will happen during the conference; attendees generate, staff, and participate in the resulting sessions; and finally, the conference provides group sessions for private and public individual and group reflection and future initiatives.

> "Conversation is king. Content is just something to talk about."
>
> —*Cory Doctorow. boingboing.*

Imagine what happens *unofficially*!

I am fascinated with how much interactive richness evolves out of the right amount of structure. Business visionary David Weinberger, in his thought-provoking book *Everything Is Miscellaneous*, describes Wikipedia as a "pragmatic utopian community that begins with a minimum of structure, out of which emerge social structures as needed." Like Wikipedia, where a majority of edits are done by less than two percent of the contributors, but most of the content is created by unregistered occasional contributors, a peer conference is not pure bottom-up, but contains a mixture of top-down structure, and bottom-up attendee-driven content.

Similarly, too much structure at a conference leads to excessive formality that gets in the way of conversations, while too little structure fails to generate the necessary level of personal information that attendees need to quickly engage in meaningful interactions. I've worked on observing and tuning this balance at peer conferences for years. Getting the mix right, sustaining it throughout the conference, and ending with sessions that integrate and enrich individual and group understanding creates a rich, productive stew of interaction and discovery that is largely absent from traditional conferences.

Flattening hierarchy

In the previous chapter, I described the benefits of de-emphasizing attendee status at the start of a conference. Following this intent, a peer conference works to flatten perceived and proclaimed hierarchy throughout the event. Ground rules, roundtable process, methods for determining session topics, even the closing sessions formats are all designed to minimize overt and covert preconceptions about whether some attendees are more important than others.

Peer conference ground rules fashion a confidential environment where freedom to ask questions, be they specific or fundamental, is made clear and agreed to by all participants. Confidentiality removes the fear of extra-conference repercussions, making it easier for the unconfident attendee to ask questions. Specifically agreeing that everyone has the freedom to talk about what they want to talk about, including feelings, and that everyone can ask about anything puzzling, lowers self-imposed barriers to bringing up "stupid" questions and topics (which, it frequently turns out, many of the attendees want to ask or discuss).

The roundtable reinforces this initial message. By allocating the same amount of time for each attendee to speak to everyone present, and by having people speak in no particular order, the roundtable implies that everybody's needs, desires, experience, and expertise are important, and that the conference is about learning and sharing, things of which we are all capable, whether newcomers to or 30-year veterans of the conference's subject.

When it comes to suggesting session topics at a peer conference, everyone has an equal opportunity to publish their ideas for all to see. Democratic voting, tempered only by feasibility, drives the selection of sessions. Anyone can volunteer to help analyze the votes and organize and schedule the resulting peer sessions.

Peer conference sessions are rarely large, and are invariably informal, with questions welcomed. Small sessions do much to reduce conversational barriers between attendees with different levels of knowledge and understanding.

Finally, sharing at the personal introspective provides a surprisingly intimate window on attendees' realizations, conclusions, and plans. When, in a single session, a seasoned CEO states that he hasn't been treating his staff well and needs to change his behavior in some areas; an industry veteran announces that the conference has helped her decide to take a whole new direction in her professional life; and a novice communicates his touching new-found excitement about the conference, attendees are drawn closer and status is the last thing on anyone's mind.

Creating community

Creating community is not a primary goal of peer conferences, but rather a delightful bonus outcome. Peer conferences usually evoke intimate communities-of-the-moment, but they also often lead to the formation of long-term associations. While there's no guarantee that a peer conference will be the initial seed that blossoms into a lasting community, about half of the peer conferences I've facilitated have led to some kind of repeat engagements for a significant percentage of the original group.

Because peer conferences de-emphasize attendee status, the nature of any resulting community is likely to be more inclusive and less cliquish than communities that form around traditional conferences. The peer conference atmosphere permeates attendee interactions outside the conference, making it easier for people to ask other participants for advice and support.

The key to getting important questions asked—answering attendee meta-questions

For a conference to be able to answer attendee questions effectively, attendees must feel comfortable asking questions in the first place. There are a couple of conditions that, if satisfied, will greatly increase the likelihood of this occurring.

First, the conference has to create an environment that encourages attendee questions and supplies ample opportunity for asking them. The opening session of a peer conference, the roundtable, explicitly gives attendees permission to ask any questions they have and offers a safe environment that encourages them to do so.

Second, we can help attendees overcome one of the biggest obstacles to making meaningful connections with others—getting started. To make it easy to strike up conversations with the right people, we can supply attendees with the answers to *meta-questions* about the other participants and the conference environment. Here are some examples of early conference meta-questions:

- Who else is here?
- Who might I be interested in talking to?
- How can I start a conversation with them?
- Who here may be able to answer my questions?
- What are other people interested in talking about?

TABLE 5.1 • Meta-questions and the Corresponding Peer Conference Session(s)

META-QUESTION	PEER CONFERENCE SESSION
Who else is here?	Roundtable
Who might I be interested in talking to?	Roundtable and peer sessions
How can I start a conversation with them?	Roundtable
Who here may be able to answer my questions?	Roundtable and peer sessions
What are other people interested in talking about?	Roundtable and peer session sign-up
Where can I talk about what I want to talk about?	Peer sessions
What have I learned?	Personal introspective
What might I want to change in the future?	Personal introspective
What might we want to do in the future?	Group spective

Unlike traditional conferences, peer conferences offer unique opportunities for attendees to get these questions answered. Table 5.1 lists attendee meta-questions, paired with the peer conference session or sessions that provide corresponding meta-answers.

Answers to these meta-questions give attendees the information they need—the right people to talk to, interests in common, and conversational openers—for asking their specific, topic-related questions during the peer sessions. At every peer conference I've run, attendees have commented on the ease of getting to know the participants they find interesting and rewarding to meet.

Synergy

It's difficult to convey the cumulative effect of the peer conference components. A safe and welcoming environment, introductions to the other attendees, discovering what people want to talk about and what they know about, the ability to create a conference that fits personal needs, and the opportunities to reflect on what happened individually and as a group—the combination of all these factors creates the conditions where wonderful things happen for attendees.

> "They speak only of such a Synergie, or cooperation, as makes men differ from a sensless stock . . ."
>
> —*Peter Heylin. Historia quinqu-articularis. London, 1660*

A peer conference is synergistic; greater than the sum of its parts. In the same way that a good book's plot, characters, and writing draw in and engage readers, a peer conference contains just the right ingredients to draw in and engage attendees. When people are given the permission, tools, and support to fashion a conference that is just right for them, they quickly become immersed in a flow of ideas, learning, and connection that builds on itself, creating not only fruitful personal experience but also an infectious group energy. Such is the power of synergy that permeates a peer conference—my wish for you is that you get to experience it for yourself.

Combining peer and traditional conference sessions

I'm pragmatic, not a purist. Including peer and traditional sessions can combine the best features of both conference models into one event. The trick is to restrict your traditional sessions to presenters and topics that you are confident will be dynamite for your conference.

This requires a willingness to scrutinize proposed conventional presentations or keynotes for excellence, and avoiding any quota for conventional sessions. If you can get a fantastic keynote speaker who can address a hot topic at your conference, book her. If no choices for a keynote excite you, don't have one. Similarly, review proposals for traditional presentations or panels, and don't worry about not having enough fixed sessions. A peer conference will soak up the time available—more time means there's time for another round of peer sessions.

The advantages of this approach are twofold: First, advertising specific speakers and presentations will attract attendees who prefer to know in advance that at least some of the conference program will be of interest, and, second, taking comfort in knowing that the fixed sessions you offer are of high quality and likely to be enjoyed by participants.

Novelty

I have been scared of doing new things for most of my life. When I first started college teaching, I was a nervous wreck, preparing every lesson meticulously for hours. I was scared I would not know the answer to some question, scared that I would get confused and look like an idiot, scared that my students would discover that I didn't know everything about my subject. It took about five years before I started to relax, discovering that I could make mistakes and not know all the answers, and still feel okay about myself.

The same thing happened when I first started facilitating conferences. I was anxious in front of the assembled attendees—would I be able to explain the conference process clearly and facilitate effectively, or would people be baffled and frustrated, and leave?

These days I'm relaxed about teaching and conference facilitation. It's not because I have mastered my subject and approach—on the contrary, I learn every time I teach, train, or facilitate. Rather, time has built familiarity with my self-knowledge and self-confidence. I know, more or less, my strengths and weaknesses and am comfortable with them.

But this has taken me years.

When you go to a conference that you haven't attended before, you'll usually feel anxious on arrival. It's normal to feel somewhat awkward or embarrassed to be among a bunch of strangers, some of whom are gaily chatting away with each other while you, knowing no one, wonder how to strike up a conversation. People suppress these feelings at conventional conferences, because they believe they should project a "professional" appearance that avoids the display of emotions considered negative, like fear or anger.

People come to conferences with questions. A traditional conference provides, primarily, a framework for answering attendees' questions about content, the topics covered at the conference. By reading the published conference program, people can get some idea of what topics are, ostensibly, going to be covered. But, as we've seen, attendees have many other kinds of questions, and a traditional conference has no direct means to provide the answers they need.

A peer conference allows novelty, in both structure and content. If attendees want to hold a session with an unusual format—a performance, say, or an impromptu simulation, or a three-hour presentation—then conference organizers will make every effort to "make it so." Creating such a conference schedule is challenging, but the work is made easier by the knowledge that *this is what attendees want*.

The culture of a peer conference embodies flexibility, which in turn makes it easy for attendees to suggest and carry out novel ideas. Sometimes, one year's amusing novelty turns into a quirky and beloved annual tradition—the annual softball game or the midnight swim in the nearest available body of water. I like it when that happens.

CHAPTER

6 Beginnings

Connections

Since 1978 I have lived in Marlboro, Vermont, a town of sixty square miles and about a thousand residents. Today I drove eight miles to downtown Brattleboro to help run a raffle booth for the local United Way during the monthly Gallery Walk, an evening for artists to display their work. Standing at the intersection of Main and High Streets, I saw a continual stream of acquaintances. As they passed by we exchanged smiles, nods, sometimes a hand raised in greeting or a few words exchanged. Some people stopped and we talked for a while. The weather was warm and pleasant, and no one seemed in any kind of hurry. Much of my enjoyment came from the serendipity of whom I might next see.

> "Of all the domains in which I have traced the consequences of social capital, in none is the importance of social connectedness so well established as in the case of health and well-being."
>
> —*Robert Putnam. Bowling Alone. Simon & Schuster, 2000*

When I moved to Marlboro 30 years ago I knew no one in this part of Vermont. My connections with the people I greeted today spring from many different facets of my life. Some live in Marlboro, where I met them over the years through town functions, or because their kids went to school with mine. Others I ran into through my consulting work, or via community events my family attended or helped to organize. A few I knew through parties at friends' houses, or perhaps a chance conversation at the local food coop. These days it's unusual for me to go anywhere locally and *not* bump into people I know.

My experience of community is very important to me. Meeting other people nourishes an essential need I have, the need for human connection. My existing connections, the commonalities we have already discovered, give me an opening, an introduction to possibilities that may follow. I am comfortable being alone; in fact I need regular solitude for thinking, working, learning, and relaxation. But I am rejuvenated, stretched, and sparked by the people connections, whether casual or deep, that I have made and that I continue to delightedly explore.

Most of us have chance encounters with others every day, especially in a big city where you're perpetually surrounded by hundreds of people whenever you're in a public space. But in a city it's rare to ever meet again the stranger whose eyes met yours yesterday in a crowded bookstore. One of the reasons I love living in a rural community is that it's very likely I'll run into acquaintances when I go into town, pick up my mail at the local post office, or join a yoga class.

I believe that the great majority of people, like me, hunger for connection with others. Without it, our lives suffer. Indeed, Robert Putnam in *Bowling Alone,* his sobering opus on social change in America, states that about half the observed decline in life satisfaction among adult Americans over the last 50 years "is associated with declines in social capital: lower marriage rates and decreasing connectedness to friends and community." And the sociologist James House tells us that "the magnitude of risk associated with social isolation is comparable with that of cigarette smoking and other major biomedical and psychosocial risk factors."

Traditional conferences—content over connection

So, why, when we hold a conference in our culture—an occasion when we bring together people with a common interest in a subject—do we place such little emphasis on the potential for connection with our fellow conferees? After all, we have the ideal requisite for enjoying each other's company—we all share a common interest! Why, then, are traditional conference sessions structured to fill us with content from the few, limiting interaction with our peers? Why are the opportunities for developing connections relegated to the gaps in the conference schedule, the "informal" time when we are not in sessions together?

I can think of a couple of reasons for this sad state of affairs, and I'm sure there are others. First, as Jerry Weinberg reminds us: "Things are the way they are because they got that way." It's my observation that conferences mirror the structure of their professional origins. As organizations or professions develop hierarchies of power and status—consultants/practitioners/interns in medicine, or professors/lecturers/postdocs/postgrads in academia, or president/vice-president/manager/staff in business, for example—conferences for these groups tend to reflect these hierarchies. How do we publicly display the status of a profession's heads? By singling them out as presenters at the profession's conferences.

I am not making a value judgment about the worth of publicly recognizing or taking advantage of anyone's mastery of a topic or field. Clearly, attendees benefit when they are presented with cutting-edge information, unavailable elsewhere, from leading experts. But when conference sessions are used to announce or confirm status of individuals in the profession, this leads to session formats—predetermined keynotes, presentations, or panels—designed to emphasize the contributions of the folks at the top. Such formats highlight what a few have to say at the expense of session formats that can strengthen connections between *all* attendees.

There's another reason why we cling to one-to-many session formats at traditional conferences. Unless you've been attending the same annual conference for years, you probably won't know much, if anything, about most of the other attendees. Unfortunately, a traditional conference gives you little if any opportunity to readily discover kindred spirits. So when a conventional conference attempts to use more inclusive session formats, like discussion groups where people have opportunities to make individual connections, participants don't have the information they need—either to decide whether it's worth joining a particular discussion group or to easily make connections with attendees at the session. This makes such sessions difficult to carry off successfully.

Building meaningful connections into the conference process

Unlike traditional conferences, creating an environment that encourages and supports the building of meaningful connections between attendees is a key goal of every peer conference. How can we do this?

Think about the conditions I needed to build my web of local connections over the past 30 years. There were two fundamental requirements. *I needed opportunities to discover and meet like-minded people, and I needed reasons or excuses to fall into conversation with them.*

We don't have 30 years to build connections at a conference. We have, at most, a few days together, perhaps a few minutes of potential interaction with each attendee. So how can we best build the above requirements into our conference process?

Whatever we do, it should happen quickly, and at the beginning of the conference. No waiting to try to meet people during session breaks. If we're going to be proactive about fostering connection, let's start right at the beginning of the conference to maximize the opportunity.

How do we discover like-minded people? We need an opportunity to ask them what we want to know and hear their answers. Their answers inform us about interests and experiences we share, commonalities that will provide openings for us to engage with them.

Suppose we could create an initial conference session where we could ask everyone present what we wanted to know about them. What kind of questions should we ask?

We need open-ended questions, questions that are appropriate for any attendee to answer.

We need questions that can be answered safely by an anxious participant, questions for which there are no wrong answers.

We need questions that cover the past, the present, and the future. Hearing where someone is coming from tells us about their context and their experience; it gives us baseline information. Hearing about what they want to do now, at the conference, and in the future, their wishes for their professional or personal life, tells us about the interests we may share and where their energy is focused. All of this is valuable information.

We also need to ask about people's experience or expertise that might be useful to other attendees. There's no guarantee that what people tell us will be useful, but if we don't ask, how will we know?

It turns out that we can satisfy all of the above requirements with just three questions. These are the questions we ask every attendee to answer publicly at the first session of a peer conference—the roundtable, which is the next topic of this book.

The roundtable

By now, you're probably curious about what happens at a roundtable and why. This chapter will answer your questions!

> "How did I get here?"
>
> "What do I want to have happen?"
>
> "What experience do I have that others might find useful?"
>
> —*The three questions that each attendee answers publicly at a peer conference*

Roundtable overview

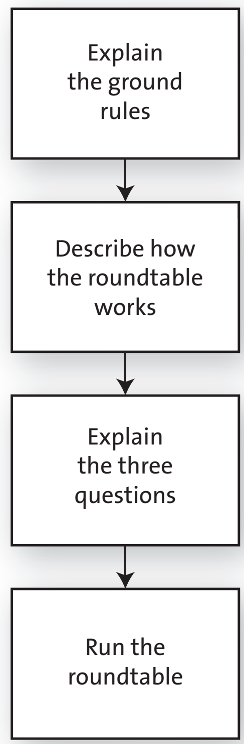
To introduce you to what happens at a roundtable, let's start with an overview of the roundtable process, as shown in Figure 6.1.

Before the actual roundtable starts, the roundtable facilitator:

- Explains the conference ground rules and asks attendees to commit to them.
- Describes how the roundtable works.
- Explains the three questions listed on a card given to each attendee.

The conference ground rules consist of the Four Freedoms, described below, and rules about safety and staying on time. Attendees are asked to display their commitment to these ground rules by standing.

FIGURE 6.1 • Roundtable Process



Each attendee is given a card printed with the following three questions:

> "How did I get here?"
> "What do I want to have happen?"
> "What experience do I have that others might find useful?"

The roundtable facilitator explains that each attendee in turn will have the opportunity to answer these questions, gives some examples of answers attendees might provide, and explains that everyone will get an equal amount of time to share. Attendees are then given a few minutes to think about their answers.

After the facilitator provides the guidelines, sharing begins. A timekeeper provides an audible warning before each person's time is about to expire, and a second warning when time is up. As topics and themes emerge, two scribes record them on flip charts or whiteboards.

History

The first time I used a roundtable at a conference was in 1992 at the first ACCESS (later edACCESS) conference, held at Marlboro College. I remember that we sat around a solid block of rectangular tables, in the room the school used for faculty meetings. Hardly anyone present knew anybody else, so it seemed natural to go around the room and have everyone introduce themselves, say a little about why they had come, and describe what they were interested in talking about at the conference. There were only 23 attendees, and we didn't really have anywhere else to meet, so we ended up running the conference as a series of whole-group discussions that were based on the popular topics brought up during the initial roundtable.

For a number of years, my conference roundtables continued to be structured as a relatively informal way for attendees to introduce themselves to each other as they saw fit. I let people take as much or little time as they wanted; this occasionally proved annoying when some people spoke too long. So I added a fixed time duration for each attendee, using a roundtable timekeeper who gave an audible signal when an attendee's time was up. Later, I found it was helpful to have the timekeeper provide a second warning signal 30 seconds before an attendee's time expired.

In 1995, I came up with the idea of providing questions for each attendee to answer during the roundtable; questions that would both elicit the kind of information needed to build connections as well as uncover the topics and themes that participants wanted to explore. I'll say more about these questions later in this chapter. Initially, I used two questions—"How did I get here?" and "What do I want to have happen?"—adding a third question, "What experience do I have that others might find useful?" in 1999.

The value of a roundtable

The first session of a peer conference, the roundtable, serves three broad purposes. First, it defines and models an active, interactive, and safe conference environment. Second, the roundtable provides a structured forum for attendees to meet and learn about each other's affiliations, interests, experience, and expertise. And third, the session uncovers the topics that people want to discuss and share, as well as indicating the level of interest in each topic.

A roundtable always begins with a description and explanation of conference ground rules and then asks attendees to commit to them. I began providing explicit ground rules at the start of a peer conference when I discovered it led to increased sharing, intimacy, and sense of connection among participants. These ground rules, which are detailed later in this chapter, send participants the following powerful messages:

> "While you are here, you have *the right and opportunity to be heard*."
>
> "*Your* individual needs and desires are important here."

> "*You* will help to determine what happens at this conference."
>
> "At this conference, *you can create, together with others, opportunities to learn and to share*."
>
> "What happens here will be *kept confidential*. You can *feel safe* here."

Roundtables provide a structured, nonthreatening way for attendees to learn about each other early in the conference. During the session, people discover topics that interest others. They get a sense of the depth of interest in these topics, and they find out who has experiences that they want to connect with and explore further.

At a conventional conference, people meet and learn about each other slowly, mostly outside the programmed sessions. A peer conference roundtable introduces every attendee to every other participant, right at the start of the event. Hearing a little about each person makes it much easier to introduce yourself to anyone with whom you share a particular interest.

At a roundtable, every person has the same amount of time to share with other attendees. This flattens the initial conference hierarchy: Any attendee may possess something of value for her peers, allowing the conference process itself to uncover what experiences are of value to the people present.

By not making assumptions, either about what content is of value or about who has valuable content to share, a peer conference roundtable provides a safe environment for participants to express and explore what is truly of value to them. The practical result of this approach is remarkable: *Valuable topics are uncovered and valuable participants are discovered that were simply unknown to the conference organizers*. This occurs at every roundtable I have facilitated.

Finally, I've found that the simple act of starting a conference with structured group sharing has a profound effect. It provides a powerful, infectious model of interaction and creates an intimate atmosphere that attendees rarely experience at a traditional conference.

These are some of the benefits of a peer conference roundtable. Let's go over the details now, so you can see how a roundtable works, and understand how these benefits arise.

The shape of a roundtable

When I started with roundtables, I didn't especially care where people sat. As long as we were all roughly facing each other the setup seemed good to me. Sometimes people came in late, took a chair and formed a second row around the assembled group. I recall one conference where people arranged themselves in an irregular shape several rows deep, principally because the room was too small to hold everyone in a single closed loop of chairs.

Roundtables where people were arranged haphazardly seemed less intense, less focused, than those where people sat in a more regular fashion. Where people couldn't see each other, the sense of intimacy in the group was reduced. People were more likely to fidget, side talk with their neighbors, and simply be less involved in the process.

Eventually I began to insist on using a circle of chairs for the peer conference roundtable. In a circle, everyone can see everyone else—people are more exposed—which creates a group tension that encourages alertness and concentration on what the speaker in the circle is saying at each moment. The circle of chairs provides a ritual space, a space in which each person in the group can meet, however briefly, every other person present.

Ground rules

Facilitators of a group that plans to work together for an extended period of time will normally have the group establish its own ground rules, not only because group-developed ground rules will handle the specific needs of the group, but also because the process of development creates buy-in for the rules that are chosen. Unfortunately, it takes up too much time to brainstorm and negotiate ground rules for a single conference. Consequently, I've chosen to use the following rules, developed over many years, at peer conferences. I've found they work extremely well.

I provide the peer conference ground rules in a handout to attendees describing the *Four Freedoms*, a rule about *confidentiality*, and a rule about *staying on time*. The facilitator explains the rules at the start of the roundtable, and attendees are asked to commit to them for the duration of the conference.

Four Freedoms

All of us have a comfort zone for our interactions with others, a social space inside which we feel comfortable. The boundaries of this zone vary, depending on who we are interacting with, our context (home, professional, social, etc.), and the level of safety we feel in a specific situation.

The Four Freedoms are important ground rules, derived from the work of family therapist Virginia Satir and further refined by Gerald Weinberg and Donald Gause and Norman Kerth. I provide a copy, printed on a card, for each attendee. Here they are:

- You have the freedom to talk about the way you see things, rather than the way others want you to see.
- You have the freedom to ask about anything puzzling.
- You have the freedom to talk about whatever is coming up for you, especially your own reactions.

- You have the freedom to say that you don't really feel you have one or more of the preceding three freedoms.

The Four Freedoms invite attendees to be fully present with each other.

The first offers the gift of talking freely about what a person sees and understands, despite what others may think or say.

The second offers the gift of asking freely about what a person does not understand.

The third offers the gift of freely expressing feelings in response to what is happening.

The fourth offers the gift of freely discussing the lack of any of the other three freedoms.

In my early peer conferences I did not offer Four Freedoms to attendees. Since I started including them, my roundtables have felt more intimate and empowering. The Four Freedoms create a supportive, safe environment for people to take risks and speak about subjects, beliefs, questions, and feelings that they would not normally share. This environment encourages attendees to commit to and engage in the conference experience, rather than remaining passive observers and occasional contributors.

I end my introduction to the Four Freedoms by asking each attendee to help all of us by exercising their four freedoms while we are together.

In my experience, *offering these Four Freedoms at the start of a conference encourages attendees to interact beyond their normal comfort zone*. This is a heady experience for many attendees who have never before felt empowered to be either proactive or revelatory at a conference.

There are three conditions that enable these freedoms to become an integral part of the conference culture.

1. The Four Freedoms have to be clearly communicated. Participants must understand up front that they are free to express their point of view, it's okay to ask any question, it's fine to talk about how they're feeling, and they can speak up at any time they feel these freedoms aren't available to them.
2. The conference facilitator(s) and organizers must model using the Four Freedoms during the conference. (I frequently invoke the second freedom: "I'm sorry, I don't understand *XYZ*.") If you don't do this, attendees will rightly conclude that the Four Freedoms are empty words, and the conference environment will suffer greatly.
3. Attendees must actively commit to the Four Freedoms (and the two other ground rules.) How this is done is described below.

Confidentiality

The confidentiality ground rule further enhances attendee safety:

> *What we discuss at this conference will remain confidential. What we share here, stays here.*

When attendees adopt this rule, it frees them to talk about many intimate topics. Difficult situations and associated feelings, relationships at work, questions unasked for fear of revealing incompetence, even the simple enjoyment in meeting kindred souls are common examples of what may be shared at peer conferences.

It surprises and saddens me how rare it is for such a ground rule to be adopted at conferences. Providing and committing to confidentiality encourages much more sharing among attendees. Being able to safely share and be heard is often of the greatest importance to attendees, sometimes far more important than even conference content. This ground rule provides an environment for attendees who may have no other avenue to communicate confidentially and safely with their peers.

Staying on time

How many conferences have you been to where sessions started late or ran late, wasting the time of the people who were punctual, and cutting into later sessions? Too many, according to a majority of my interviewees. Breaking the tacit agreements promised by a published schedule irritates attendees, and reduces their trust in the value of the conference. When schedule times prove unreliable, people are more likely to arrive late or leave early. This causes further problems—arriving late at a session is disruptive in itself, and latecomers may want to ask time-wasting questions about content they missed.

We can't prevent people from arriving late to a session. But we can publicly request that sessions start and end on time, and ask the people who are organizing sessions to honor this desire. (A conference can also *support* staying on time by having someone available to remind session organizers, if necessary, to begin and end at the times when their sessions are scheduled to start and end.) I've found that simply providing the following ground rule:

> *We ask that you start and end all sessions on time.*

together with appropriate reminders during the conference, ensures a punctual conference.

Committing to ground rules

Imposing ground rules on attendees, no matter how well chosen, is an empty gesture unless there is attendee buy-in. Providing a list of ground rules, asking whether anyone has any objections, taking silence as assent, and hastily rushing on to the next agenda item implies that the rules are just a formality and needn't be taken seriously. But, given that we have little time to spare, how can we get some kind of commitment from participants?

I like to use a brief ritual requiring active attendee participation. (Don't worry, no animal sacrifice is involved.) I say:

> *"I would like all of you who commit to using Four Freedoms, maintaining confidentiality, and staying on time to stand."*

(People who have difficulty standing can raise their hand instead.) Simply asking attendees to change their physical stance to demonstrate their commitment to the conference ground rules may not seem like a big deal, but it's an unusual enough request to get everyone to think, if only for a moment, about what they are committing to and to help cement the ground rules in their minds. (If anyone didn't stand, I'd say "Everyone standing sit, everyone sitting stand," ask those standing to explain what they feel they can't commit to, and, if necessary, work on an agreement as to how to proceed. It hasn't happened yet.)

The Three Questions

Each attendee receives a copy of the Three Questions, printed on a card. Having each attendee publicly answer these questions comprises the core activity of the roundtable. Everything up to this point has laid the groundwork for the novel concept of everyone participating actively in the conference, a participation that will lead to rich dividends for all attendees.

This point in the conference is the only time when every attendee is expected to speak publicly. Some people have a hard time speaking to a group. By providing a supportive environment and requiring each attendee to speak, however briefly, a peer conference gives reluctant attendees a relatively safe opportunity to discover that sharing a little about themselves in public may not be as scary an ordeal as they thought. Expecting each attendee to say something at the roundtable gently reinforces the notion that the conference's culture embraces active participation, and once they've had this experience, they are more likely to contribute during the conference.

Before sharing starts, the roundtable facilitator points out that *there are no wrong answers* to the three questions. This helps attendees who are nervous about sharing in public to relax, and gives people permission to share as much or as little as they wish, depending on their comfort level. The facilitator then explains the three questions to everyone and gives a few minutes for attendees to reflect on what they want to say.

Let's look at each question in turn.

How Did I Get Here?

Most group introductions, when they occur, are of the form "My name is John Smith and I work at MegaCorp." In contrast, the question *How did I get here?* provides a safe way to uncover whatever each attendee chooses to reveal about his connections to the other participants. An attendee might say "I drove from Springfield on I-89" or "Fred, who I work with and who came last year, told me this was a great conference" or "When I came to this conference two years ago, I discovered I was not alone." Often, attendees say a great deal more. This question allows participants to learn more about their fellow attendees, and, in the process, begin to form ideas about who they may want to spend time with during the rest of the conference.

What Do I Want to Have Happen?

This question invites attendees to share what they would like to experience at the conference. What do they want to learn more about, what questions do they want answered, and what topics do they want to discuss? The facilitator encourages attendees to answer this question as if the conference could provide everything attendees asks for—as long as they ask! Attendees are told they can ask for general topics, the answers to highly specific questions, technical issues, "people" issues; *what's important is that attendees ask for what they want*. Some examples:

- "I want to talk about marketing with anyone who has experience with community supported agriculture."
- "I need to find out how to configure X widgets so they will frambolize successfully."
- "How has your organization decided on Acceptable Use Policies?"
- "My division head often rejects my professional opinion—I'd like to know how I can be more credible with her."

Two roundtable scribes record topics mentioned by attendees onto flip charts or whiteboards. The resulting lists are displayed at peer session sign-up; they also serve the purpose of reassuring each attendee that his concerns and interests have been heard and captured for the group.

What Experience Do I Have That Others May Find Useful?

When I added this question in 1999, I had no inkling how valuable it would turn out to be. In every conference I've facilitated since, the responses have uncovered experiences or expertise unknown to the conference organizers, experience that has been of great worth to attendees.

I have seen casually mentioned topics evolve into rave conference sessions (in one case, a session that everyone at the conference attended). And at a more intimate level, I have seen someone discover the one other person at the conference who understands *exactly* what she is talking about, with the resulting blooming of a fast friendship. The only thing that's predictable about this question is that the responses will uncover unexpected topics and unanticipated interest in some of these topics.

There is another benefit from this question that I did not expect. *Often, the people who describe their experience have no idea that others would find it valuable!* What has been warming for me is to see how this discovery empowers these individuals. To discover that your peers value and admire your work in an area validates you professionally and personally. What a gift to receive! At a peer conference, such gifts are easily and frequently given.

Sharing answers

Before sharing begins, the roundtable facilitator provides four guidelines to attendees.

1. The facilitator encourages people to share what they want to have happen, even if others have already mentioned the same topics. This helps reveal to everyone present the degree of interest in specific subjects.
2. The facilitator tells attendees that if they hear a request for help on a specific issue and they can help, they can stick up their hand, say their name and a brief "I can help with that." This connects attendees on specific issues right at the start of the conference, issues that might be too specialized to attract enough interest for a conference session.
3. The facilitator asks those who can't stay for the entire conference to mention when they're leaving. This helps avoid scheduling a session involving someone's expertise after they have left.
4. The facilitator recommends that attendees use the draft copy of the conference *face book* to record information of interest that is shared during the roundtable. The face book is a printed list of attendees with their affiliations and other pertinent information, including attendee photographs, which is provided to each attendee before the roundtable begins.

The facilitator's final task is to explain how timekeeping works. Each attendee receives the same amount of time, though no one has to use all of it. The amount assigned, normally between 90 and 150 seconds, depends on the number of attendees and the conference duration, as explained in the third part of this book. The timekeeper demonstrates the signals, playing the warning sound heard when an attendee has 30 seconds left, and then the "time's up" sound.

Finally, it's time to share! The facilitator can start with a prearranged volunteer, perhaps one of the conference organizers who can model good answers for attendees to follow, or ask for a volunteer to start, or go alphabetically, using the face book order as a guide. By not employing any special expertise-based order for sharing, the roundtable reinforces the message that everyone's sharing is equally important.

CHAPTER 11

How to Start Making Your Conference a Reality

I've never *organized* a peer conference by myself. I've run a small one-day conference by myself (and that was tough), but I'd never dream of doing the pre-conference design, planning, and marketing work solo. Here's why.

First of all, organizing a conference is a *lot* of work. Unless you're working full time at it, you're going to need and appreciate some help. But there's another important reason not to go it alone.

In my experience, a successful conference flows from a *diverse steering committee* that represents the variety of individuals, organizations, and viewpoints that are the target audience. A steering committee is a group of people who take responsibility for making a conference happen; they organize and run the conference. Although other people may do significant tasks, the steering committee is ultimately responsible for ensuring that the conference takes place and is successful.

Besides the benefit of sharing the workload, a well-chosen steering committee will supply multiple viewpoints on the conference design, and a variety of personalities and skill sets for the various conference tasks. One person happily handles conference registrations and conference fee deposits, another enjoys creating marketing materials, while a third is skilled at updating the conference website. You'll also have more resources for the external contacts you may need to develop any conventional parts of your program. And, perhaps most important, is the pleasure and excitement of sharing with your committee in creating an event that can meaningfully touch attendees' lives.

How do you start? Looking back at the conferences I've helped organize, there's always been an existing group that formed a starting point for the conference steering committee. It doesn't need to be a large group, maybe just three or four people. Typically, someone in the group suggests the idea of a conference and the others respond enthusiastically. You're on your way!

I'm not saying it's impossible for a single charismatic individual to inspire a conference and persuade volunteers to help, but I haven't seen it done, and I'd be wary of a peer conference that was largely the product of a single person's vision.

If you can't easily find people who will volunteer to help you, that's a strong indication that you need to think twice about creating the conference in the first place. There needs to be a certain level of energy for the conference to happen and for people to attend, and ease in finding people willing to serve on the steering committee is a good predictor of your readiness to organize a successful conference.

So, you and some members of an existing group decide you want to hold a conference. Perhaps there are three of you. What do you do next?

Forming a steering committee

I have organized peer conferences with steering committees as small as three and as many as a dozen people. In my experience, 5 to 10 volunteers is a good size for a conference steering committee. With fewer than five, the workload starts to become excessive for a typical volunteer. Committees with more than 10 people tend to become unwieldy and decision making slows down, but I would not reject a couple of extra members if everyone has useful skills and enthusiasm for the work.

Try to form your conference steering committee from the members of an existing group. Suggest the idea of a conference to the group and, if there's sufficient interest, explore the time commitment and work involved and ask for volunteers to help organize and run the conference.

Even if there isn't an existing group to approach, it's often possible to create a conference steering committee by contacting appropriate individuals who you expect may be interested and who have the energy and time to commit.

When you're talking to potential committee members, have in mind the variety of work you'll need to make your conference a reality. Use the list of jobs in Table 12.1 as a guide. Provide this list of conference tasks to the people you approach, so they can think about how they might best contribute and make a preliminary commitment to one or more areas. As people volunteer to help out, keep track of what remains as you assemble a committee that can, collectively, take responsibility for everything that needs to be done.

Group culture, leadership, and your steering committee

The quality of your peer conference and your pleasure, or lack of it, while you are planning and running the event can be greatly affected by how well your steering committee members work together. Over 100,000 books have been written about group dynamics, management, and leadership, and I doubt I have anything new to say on these subjects. Even so, I hope that the following comments provide some useful advice on the many subtleties of working with a group of people toward a common goal.

> "I believe organizations are successful when they have shared values, a clear vision of success, motivation to succeed together, and respect for the various roles required to succeed. Shared values help avoid irreconcilable differences. . . . While the vision must be clear, the leadership needs to be flexible. The world changes, and successful organizations need leaders who can guide them through those changes. Every member of the team must be motivated to participate in the team's success, although different people may have different motivations. One of a leader's roles is to understand those motivations and address the needs of the people on the team. One critical shared value is recognition of the importance of every person's role on the team. When people don't feel valued, they lose motivation to support the success of the team."
>
> —*Ken Flowers*

There are many models of how people behave in groups, and each of them is useful in certain contexts. In the context of organizing and running a peer conference, I tend to employ an *organic* model, in which group members are seen in terms of their uniqueness, rather than categorized by their roles. An organic point of view allows and encourages people to find ways to work together in a variety of complex situations, and leads toward problem-solving that benefits everyone.

For example a steering committee I coordinated was offered the option of engaging a well-known, desired keynote speaker for a conference to be held in six months. Initially, his appearance fee was more than our budget could handle, but at the last minute he suggested appearing virtually, giving his presentation on a large video screen, at an affordable fee. We needed to quickly find out whether the conference site could support a virtual presentation.

If we had been using a linear approach to group organization, we would have already chosen the steering committee member responsible for technical issues and it would be her job to resolve this issue. If she were busy or sick, I'd have had to poll the other committee members for help and ask someone to take on additional work. In this case, our committee was comfortable with an organic approach, so I sent a request for help to all the steering committee members, most of whom had some technical expertise.

Because the committee culture was one of staying flexible in the face of unexpected circumstances, cooperatively working together to solve problems, and respecting each member's unique constraints and contributions, I didn't worry about treading on anyone's toes by sending out a general request for help. The outcome: One of the committee members had some free time and immediately offered his expertise, while another, the speaker liaison, told us he thought the speaker would have the information we needed and would check with him.

How do you build this kind of culture for your steering committee? This brings us to the question of what *leadership* means in the context of organizing and running a peer conference. Every book on leadership has a different approach; here's what fits for me.

Author and polymath Jerry Weinberg describes organic leadership as leading the *process* rather than *people*. "Leading people requires that they relinquish control over their lives. Leading the process is responsive to people, giving them choices and leaving them in control." Jerry's resulting definition of leadership is "the process of creating an environment in which people become empowered." This is what I try to elicit when working with a peer conference steering committee.

I also find Dale Emery's definition of leadership helpful. Dale describes leadership as "the art of influencing people to freely serve shared purposes." Bear this definition in mind as you work with steering committee members. It ties your interactions with them to your shared goal of realizing a vision, in this case organizing and running of a conference.

Who on the steering committee leads in this way? Unlike the traditional, role-based version of leadership, any member can help build a committee atmosphere that supports this kind of leadership. Once the seeds of this culture are established, I've found that it tends to become self-perpetuating. People like working together in this way. Experiencing a steering committee coming together, with the members enjoying their interactions while creating a great conference, is one of the most satisfying aspects of my work.

Although the impetus for an organic approach can come from any committee member, the conference coordinator is the natural initiator of these flavors of leadership. She is responsible for keeping the conference planning on track and avoiding planning and execution snafus. She does this, not by ordering people around, but through a respectful flow of timely reminders, check-ins, questions, requests for assistance, and appropriate redirections.

Some people have little experience working organically. They may join your committee with the expectation that their responsibilities will be determined by others, that a committee leader will give them well-defined jobs to do. Often, given a relaxed and open environment where their ideas are encouraged, they will grow into a more active role as they become more confident in their ability to contribute creatively and flexibly to the needs of organizing and running the conference.

Jerry Weinberg suggests you assume that everyone you're working with wants to feel useful and make a contribution. He quotes Stan Gross's device for dealing with his feelings that people are not trying to contribute: "They're all doing the best they can, under the circumstances. If I don't think they are doing the best they can, then I don't understand the circumstances."

Such a mindset will help you focus on finding solutions to people problems that inevitably arise in any group working together on something they care about.

Working with volunteers

Some peer conference steering committee members are paid by their organizations, but the majority, in my experience, are volunteers. When peer conference organization goes well, there's no significant distinction between these two groups. All organizers get paid in intangible ways. Volunteer motivations, usually shared by those receiving a paycheck, are numerous—altruism, the joy of service, giving back to a community that has benefited the volunteer, social opportunities, and many other reasons.

But the flip side of working with volunteers is the very lack of that paycheck. Interests and enthusiasm change with time, for both internal and external reasons, and there's no financial cost to bailing out from a committee if a volunteer's child or parent falls sick, he discovers a new passion, or finds that organizing the vendor exhibit takes more time than he thought it would.

As a result, volunteers sometimes are unable to follow through on their commitments. When this happens, don't take it personally. The reasons probably have nothing to do with you. Find out, with respect, what's going on, renegotiate responsibilities if possible, and ask committee members for help with any unassigned tasks.

Treating steering committee volunteers as individuals with unique motivations, and understanding and respecting these motivations, whatever they may be, is key to creating an environment for committee members to be effective and enjoy their work, thereby contributing to a positive and rewarding conference planning effort for all involved.

CHAPTER

23 Pre-Conference Preparation

Timing

Allocate ample time in your pre-conference schedule for site preparation. If you don't, you're likely to find yourself rushing around trying to get everything ready at the last minute. I much prefer to arrive on-site early, finish site preparation, and have a few hours to relax before registration starts, than arrive at the conference site half a day later and be running about trying to borrow a digital camera that works or installing signs in the rain as the first attendees drive up.

In general, the shorter the conference the harder it is to prepare the site. If you've paid to use a facility for a single day, you may need to pay extra for access the previous afternoon or evening so you can set up. It may even be impossible to get access the day before, because the space is booked by another event. Under these circumstances, a morning start may require your steering committee to rise at an early hour and participate in a somewhat frantic, but hopefully disciplined, rush to get everything ready on time. If you're running a short conference, meticulously plan how you'll accomplish your site preparation in the time available.

If I'm running a multiday conference I like to arrive on-site, together with a few steering committee members, about 24 hours before the conference starts. This gives us plenty of time to complete the site preparation described in the following sections, and allows for a leisurely steering committee dinner or lunch before the conference starts.

Preparing conference signage

There are two kinds of signs you'll need for your conference site, *navigational* and *informational*. Make sure signs are easily readable and that outdoor signs will withstand wind and rain.

When creating *navigational* conference signs, put yourself in the position of an attendee who has never visited the conference site. Start with the directions to the conference site you distributed to registrants. As they drive through the school gates, turn into the churchyard, or pull up to the hotel entrance, where should you place signs and directional arrows so attendees know they've arrived at the conference site and can see where to go next? Once they've parked their cars in the correct parking lot, are there signs pointing to the conference registration location? From registration, they'll need directions and appropriate signage so they can find their rooms and make their way to the conference welcome and roundtable. Finally, attendees will need signs that direct them, in either direction, between any two conference session locations.

Some *informational* signs remain fixed throughout the conference, like signs showing the name of a session location ("Vendor Exhibit Area," "Dining Hall," "Peer Session Room A"). Others, like the schedule and location of peer sessions being run on a given day, should be posted in a timely fashion once their content is determined. Planning in advance where and when signs need to be posted, with a steering committee member responsible for carrying out the plan, will greatly reduce attendee confusion, questions, and annoyance.

Setting up on-site registration

First impressions

On-site registration can be a hectic time. You have no control over when attendees show up, and invariably there will be times when there are people waiting in line to register. A one-day conference, when most people show up at the last minute, is particularly challenging.

On-site registration involves many tasks:

- Welcoming attendees as they arrive
- Providing refreshments
- Verifying attendee registration information
- Handing out the conference folder and name badges
- Registering "at the door" attendees
- Collecting unpaid registration fees

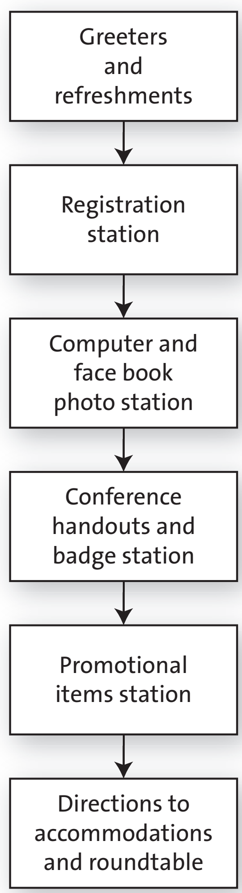
- Taking attendee photographs for face book
- Distributing swag
- Providing directions to on-site accommodations
- Answering attendee questions

Once on-site, an attendee's first experience is invariably the conference registration process. Following the suggestions in this section will help you provide a welcoming and pleasant registration experience to incoming attendees, and will minimize your stress and mistakes.

Physical setup

During your site visit you decided on a suitable place to hold on-site registration. Now it's time for setup. First think about the traffic pattern for the registration area. You want a layout that promotes a smooth flow for incoming attendees, as shown in Figure 23.1.

FIGURE 23.1 • On-site Registration Flow



Make sure there's room for a few steering committee members to meet and greet incoming attendees—this is very important. There should also be a place for attendees to relax while waiting to register. Set up some seating there and arrange a refreshment table nearby.

If you're holding a one-day, wintertime conference in a single building, provide a place for people to hang their coats.

Provided you have scheduled enough time for on-site registration (see Table 16.1), you'll only need one registration station. A registration station includes:

- Computer loaded with the registration database and any necessary camera picture transfer software;
- Attached local printer, for printing registration reports;
- Attached digital camera, for taking face book photographs;
- Blank, light-colored wall or other vertical background suitable for posing face book headshots; and
- One or more staffers with the necessary skills and training to run registration.

In addition, you'll need access to a laser printer to print copies of your face book. *A copying machine will not produce acceptable reproductions of attendee photographs and an ink jet printer will be too slow.*

The conference face book

In my view, a conference face book is an essential peer conference tool. Few people have a photographic memory that can infallibly associate faces with names or organizations, especially when meeting a large number of people in a short period of time. The face book provides an invaluable reference to conference participants, both during the conference and afterwards. I can't tell you how many times I have referred to a conference face book to find the name of the person who was so knowledgeable about a subject during an earlier session, or, six months later, to retrieve contact information for an attendee to whom I needed to talk again.

A conference face book contains a photo of each attendee, plus associated relevant information. At a minimum, this should include each participant's name, organization, address, phone, and email. Other items appropriate to the theme of the conference can be added, but only include information that is likely to be of interest to a significant number of attendees. Figure 23.2 shows a sample face book entry.

Because the face book is so useful, it should be completed, printed, and distributed at the conference as quickly as possible. This requires careful organization. I suggest you have at least

FIGURE 23.2 • Sample Face Book Entry

Name:	**Adrian Segar**				
School:					
Title:	**Conference Facilitator**				
Address:				School type:	
				Number Students:	
Email, phone:	adrian@segar.com;				
School computers:		Faculty/teaching:		IT Staff/faculty:	
Student computers:		Faculty/non-teaching:		IT Staff/non-faculty:	
		Staff/non-faculty:			
Questions:					
Expertise:	not taking myself too seriously				
User environment:					
Network OS:					
Network Topology:					
Client OS:					
Admin S/W:					
Academic tech:					
Twitter:					
Linkedin:					
Facebook:					
Other:					

one person, preferably two people, whose sole job during the conference is to complete, print, and distribute the face book.

Capture face book information from pre-conference registration. There's enough going on at on-site registration without the additional work of entering information. If you do this, you'll only need to take participants' photos at registration time. I say only, but getting an acceptable photo of every participant requires careful preparation and a certain amount of persistent follow-up to capture photos of the one or two attendees who have yet to face the camera.

It's important to plan the printing of your face book before the conference, because most copying machines will not create a decent copy of a laser-printed photograph. Such copies are usually very unflattering and seriously detract from the value of the face book. I once made the mistake of relying on the conference hotel to make copies of the face book. The resulting reproduction was so poor, it would have been better to skip the photos entirely. Do a test run of any copier that you plan to use. If a high-resolution copier isn't available, you will need to print the entire face book on a laser printer. Printing at an off-site print shop might be an option, but it hasn't worked for me because of the need to get printed face books into attendees' hands as quickly as possible.

If you print the face book on a laser printer, make sure that you print the book *uncollated* (i.e., with the software set to print multiple copies of each page before starting the next). This is usually a checkbox option "Collate" in the print dialog that appears right before printing; make sure the box is unchecked. If you print a collated face book, your printer will have to download new photographs for each page printed, and your printing speed will slow to a crawl. I've made this mistake too!

Include a footnote on each page stating that the information contained is confidential and may only be distributed to conference attendees.

If a significant number of your attendees have laptops with them, you can offer them a PDF file of the face book to store on their computer. To avoid creating a very large file, make sure that the digital photos used aren't too large. JPEG images that are 50–100KB in size work well and the resulting PDF file will be a few MB. The PDF file can be made available on the conference wiki or shared storage space. Paper copies can be printed only for those attendees who request one. A PDF file can display attendee photos in color, something that may not otherwise be possible unless you have a color laser printer to make your printed copies.

Create at least two versions of the face book. A paper copy of the first draft must be given to attendees before the start of the roundtable session, so they can make notes about what they hear directly onto the relevant person's face book page. If printing the copies with photographs will take too long, omit photographs from the first draft. To be sure that you'll get copies of the first draft printed in time, testing face book printing and copying times in advance is essential.

At a one-day conference, immediately after the roundtable post a paper copy, including photos, of the first draft of the face book in a central spot. Pin up every sheet separately, with attendees sorted in alphabetical order. Ask attendees to check their face book information by 30 minutes before lunch ends, and legibly make any corrections or additions or write a check mark if it's complete. Announce when missing photos will be taken. Before lunch ends, chase down those who haven't signed off on their face book information or been photographed.

At a longer conference, use a similar procedure, adding the printing and display of a second draft of the face book and asking attendees for a final review to catch errors and omissions.

As soon as the face book is finalized, print and distribute copies as necessary to attendees. Create a PDF of the finalized face book and post it on the conference wiki and/or shared network space.

Once you have paper copies of the face book available, don't leave them in a pile in a public space. Make every effort to limit distribution of face books to conference attendees. If you are holding a vendor exhibit, take special care to keep face books out of vendors' hands.

Preparing the vendor exhibit area

Preparing the vendor exhibit area involves obtaining and setting up any and all of the following items: tables, drapes, chairs, power, and Internet access, as per the floor plan you've already prepared. If at all possible, it's best to do this the day before the conference starts, though the morning of a conference that starts after lunch may offer enough time.

Transporting furniture and setting it up in the right place is an exhausting job that seems to take forever if the vendor coordinator tries to do it all himself, and relatively easy if he has a few people to help. Don't be a martyr; make sure that you get the help you need for this task.

If you need to run power or wired Internet connections to vendor tabletops or booths, install extension cords and cables in zero- or low-traffic areas and use gaffer tape to secure them to the floor.

Post navigational signs to guide attendees between the vendor exhibit area and the rooms where vendor presentations will be held. Also post copies of the vendor presentation schedule around the exhibit area and on the doors of the presentation rooms.

Initial conference seating

At the conference welcome and introduction, two or three people speak, one at a time, to the audience. This is a standard scenario for using a classroom-seating format, and with 60 or more attendees that's how you should set up your opening session.

If you have fewer than 60 attendees, and will be running a single roundtable session, start your conference with people seated in the roundtable circle. This avoids having attendees move around after the opening session, breaking the conference flow, and emphasizes that the roundtable is the key session at the start of the conference.

Roundtable setup

The roundtable setup you use depends on the number of attendees at your peer conference. At most peer conferences a single roundtable is all you need. But if you have more than 60 attendees you should run two simultaneous roundtables. If your pre-conference registration count is around 60, prepare for both possibilities, since at-the-door registrations may increase your roundtable attendance, while no-shows and/or late arrivals may reduce it.

If for some reason you cannot hold your roundtable in a room that is large enough for a circle of chairs for the roundtable, the next best alternative is a single block of square or rectangular tables around which everyone sits. Everyone can easily see at least the people on the other three sides with this arrangement, and it has the advantage of giving each attendee a writing surface for making face book notes. In my experience, this arrangement creates a more informal roundtable atmosphere, which can be successful with a small group, particularly if most people already know each other.

You'll need:

For every attendee:
- A chair
- A 5 × 8 card listing the three roundtable questions (see Appendix 6)
- A draft copy of the conference face book (produced right before the conference starts)

For each roundtable session:
- Two flip chart stands and pads. Masking tape, if the flip chart sheets aren't the kind with a self-adhesive strip OR a plentiful amount of wall-mounted whiteboard space
- Two roundtable scribes and a timekeeper
- A place to hang completed flip chart sheets
- Two boxes of pens
- A timing device (see below)
- A digital camera (optional but recommended)

Roundtable layout

When I started running conferences I paid little attention to the configuration of the rooms in which we met. Eventually I noticed that seating arrangements had a subtle yet profound influence on the intimacy and effectiveness of group sessions. For traditional sessions with a speaker or panel, classroom seating was fine.

But for peer conference sessions, where everyone has an equal opportunity to contribute, I realized how important it was that everyone could see everyone else's face, and that individuals weren't emphasized or de-emphasized by virtue of where they sat. Multiple rows, wavering lines of chairs, or chairs scrunched into a too-small room all significantly reduced the intimacy and power of peer sessions. For the roundtable, I discovered that a circle of chairs worked best.

To prepare for a roundtable session, set out a circle of chairs, with a few gaps so people can arrive and depart. If the space in which you're holding the roundtable is much larger than the circle of chairs, position one point of the circle near a wall where flip chart sheets can be hung.

FIGURE 23.3 • Classroom Seating

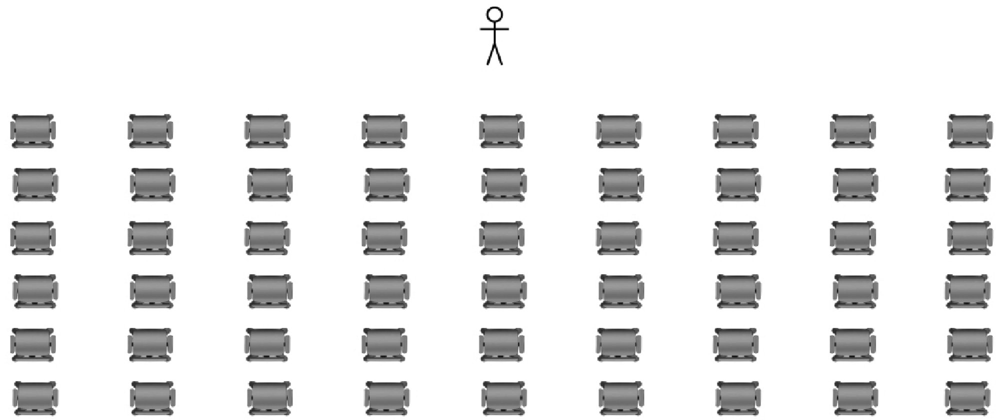
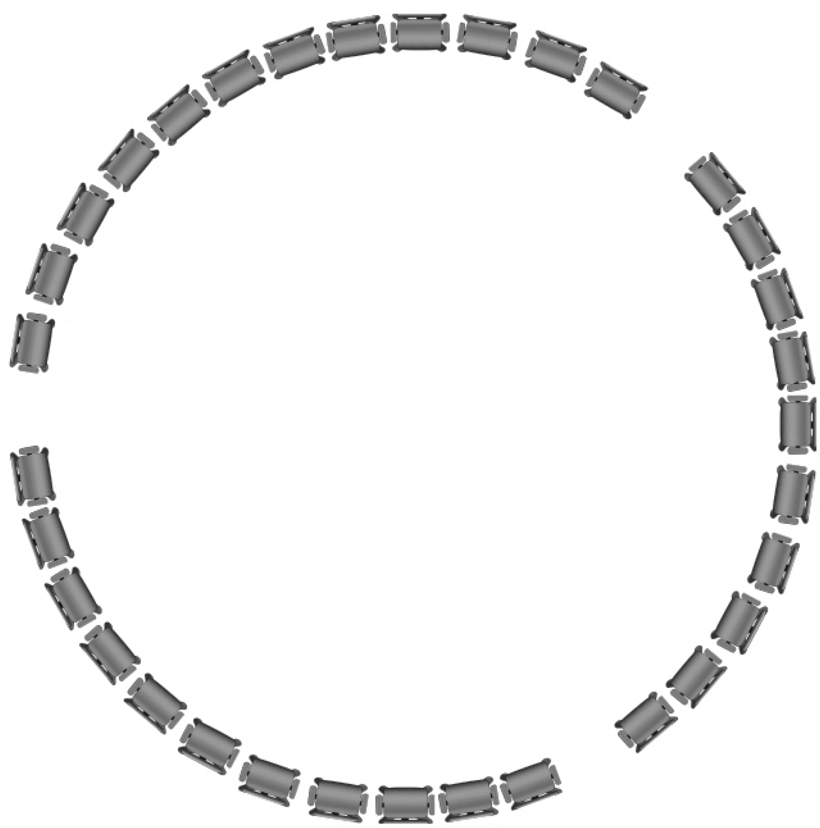


FIGURE 23.4 • Roundtable Seating



Set out one chair for each registrant, and *make the resulting circle as tight as possible*. Take time to make the circle as round as possible.

You want the smallest comfortable circle, with as few empty chairs as possible. I like to leave gaps in the circle and put out slightly too few chairs, with a pile of extras nearby. Then, late-comers can take a chair from the pile and put it in one of the gaps. This way, the circle is complete during the session, with no empty chairs at any time.

Unless you have a large expanse of nearby wall-mounted whiteboard available, place two flip chart stands near each other, just outside the circle. The flip charts should be near a wall where completed chart sheets can be hung.

Print enough roundtable questions cards to give one to each attendee. Give the cards and the pens to the roundtable scribes, for distribution at the end of the Four Freedoms introduction. If you're using masking tape to hang the flip chart sheets, tear off short strips and store them on the flip chart stands.

Use a digital camera to photograph the flip chart or whiteboard topics recorded during the session. The digital photographs, or a PDF containing them, can be posted on the conference wiki or on the conference file server, easily available for reference during the conference.

Capturing topics and themes

At each roundtable session you'll need two scribes who stand at the flip charts or whiteboards and alternatively record shared conference topics and ideas. Choose people who have some conference subject expertise so they can summarize attendee responses accurately and concisely.

Provide each attendee with a draft copy of the conference face book at the start of the round-table session. Attendees can use their copy to make notes as the roundtable progresses.

Timekeeping

It's important to share the time allocated to a roundtable session equitably between attendees. This is the timekeeper's job. She does this by sounding up to two alerts; the first, 30 seconds before each attendee's allocated time expires, the second when the time is up.

Table 23.1 shows the duration of the roundtable session (minutes) and Table 23.2 shows the amount of time (minutes and seconds) available for each attendee's sharing. So, for example, at a one-day conference with 40 attendees you would sound an alert for each attendee after 60 and 90 seconds.

TABLE 23.1 • Total Roundtable Session Time (minutes)

		NUMBER OF ATTENDEES							
		30	**40**	**50**	**60**	**70**	**80**	**90**	**100**
CONFERENCE DURATION	1 day	60	75	90					
	1½–2 days	75	95	115	135	115	125	135	145
	> 2 days	90	115	140	150	132.5	145	150	150
		←1 roundtable→				←2 roundtables→			

TABLE 23.2 • Roundtable Time Allocated to Each Attendee (minutes and seconds)

		NUMBER OF ATTENDEES							
		30	**40**	**50**	**60**	**70**	**80**	**90**	**100**
CONFERENCE DURATION	1 day	1:30	1:30	1:30					
	1½–2 days	2:00	2:00	2:00	2:00	2:00	2:00	2:00	2:00
	> 2 days	2:30	2:30	2:30	2:15	2:30	2:30	2:20	2:00
		←1 roundtable→				←2 roundtables→			

When I decided to use timekeeping for roundtables it seemed, at first glance, to be a simple affair—something that any attendee given a watch or an inexpensive digital timer could easily do. Unfortunately, I quickly found out that attendees using such equipment found it very difficult to do the job well while simultaneously maintaining close attention to what the attendees in the roundtable were saying. Eventually I came up with three strategies that enable an attendee to be the timekeeper and still concentrate on the roundtable proceedings: (1) a small high-end digital timer that is convenient to use, though limited in minor ways; (2) Macintosh computer-based timing software that provides straightforward and flexible roundtable timekeeping; and (3) prerecorded alert tracks played on a digital music player.

The ideal timer for our purposes has the following characteristics:

- Provides the two roundtable time warnings needed in a single unit;
- Can be quickly set up to signal the passing of any desired time periods;
- Automatically resets to the original countdown times after it has counted down to zero;

How to use FlexTime for roundtable timekeeping

FlexTime, version 1.2.2 at time of writing, is available for download from Red Sweater Software (www.red-sweater.com/flextime/), requires Macintosh OSX 10.4 or above, and works on both PowerPC and Intel Macintoshes. You can try out FlexTime free for 30 days, after which you will need to register the program, at a cost of $18.95 (in 2009), for it to continue to run.

Because FlexTime can play any Macintosh alert sound, you can use any sounds you like for your roundtable alerts, as long as they are in AIFF format and installed correctly. The Apple article available at *http://docs.info.apple.com/article.html?artnum=106409* describes how to convert a sound to the AIFF format using iTunes, and explains how to add the sound as an alert to OS X. There are many sources of suitable sounds available on the Internet. You can obtain chimes and other sounds from *http://freesound.iua.upf.edu* (registration is required).

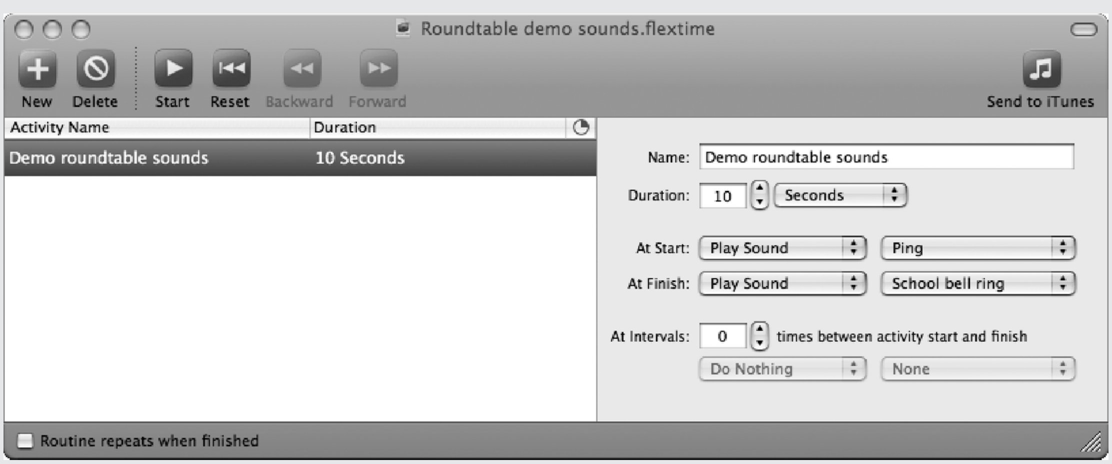
Use a different sound for the warning sound and the "time's up" sound, so attendees can know whether they need to wind up their answers, or stop.

I use FlexTime with two scripts, one that I use to demonstrate the sounds when introducing the roundtable, and one to play the sounds at the right times for each attendee. It's easy to create two alerts by adding a second timer after the first.

The first script, *Demo sounds*, plays the warning sound when started, waits ten seconds and plays the "time's up" sound.

To use the second script, *Roundtable timer*, the first timer is set to the time required before the 30-second warning. When started, the timer waits for this time before sounding the warning sound, and then plays the "time's up" sound 30 seconds later.

FIGURE 23.5 • FlexTime *Demo Sounds*



The scripts are available from www.conferencesthatwork.com, or can be quickly constructed by viewing the three screenshots in Figures 23.5–23.7.

You can export the audio from these two scripts to iTunes and then transfer the audio to an iPod or other music player. If you create a set of *Roundtable timer* audio tracks, each using a different attendee speaking time, you can use an iPod and small portable speakers to provide timed chimes for your roundtable. A set of these audio recordings is also available on www.conferencesthatwork.com.

FIGURE 23.6 • FlexTime *Roundtable Timer* Window 1

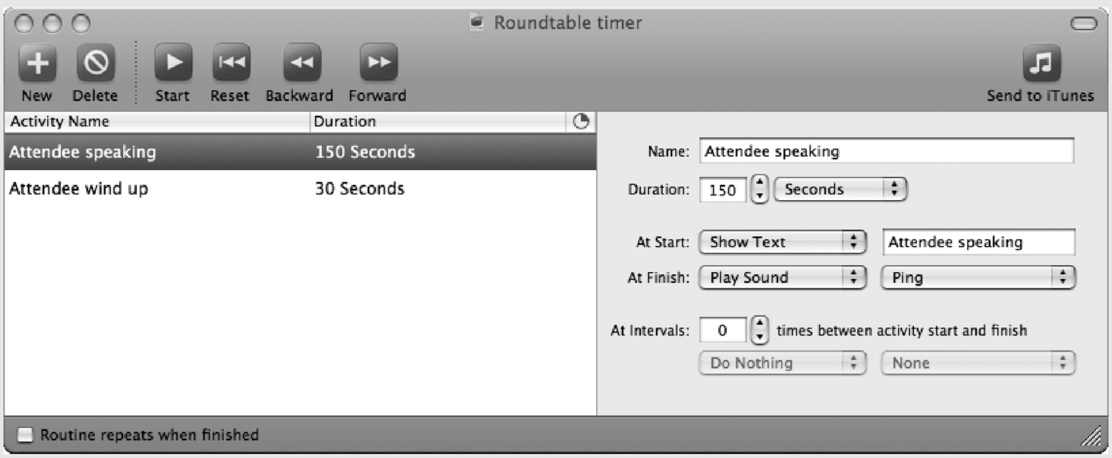
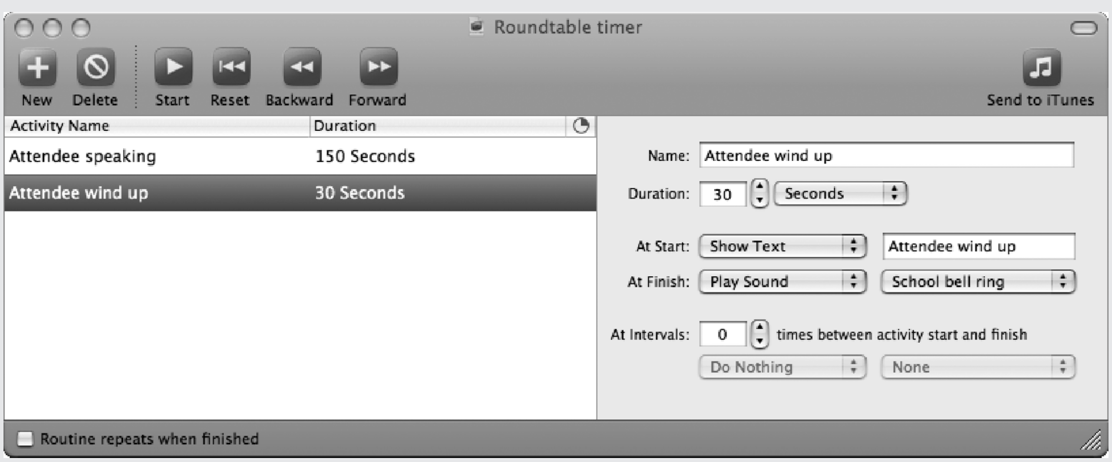


FIGURE 23.7 • FlexTime *Roundtable Timer* Window 2



- Easily resets to the original countdown times at any point;
- Makes no noise when being set or reset for the next attendee;
- Provides pleasant and appropriate warning sounds that can be changed in nature and volume as desired; and
- Is easy to use, so that it doesn't distract the timekeeper from the roundtable sharing.

The high-end digital timer and the computer-based timer I currently use satisfy these criteria. Because you may not have access to either of these, I'll also outline the older approaches that use a watch or two digital timers, and describe a method of roundtable timing using prerecorded chimes on a digital music player.

A watch with a seconds hand plus manually made warning and "time's up" sounds. This is the simplest method, but requires the most attention, and so should be given to a conference staff member who doesn't have a direct interest in the conference topic. As an attendee starts to talk, the timekeeper notes the position of the second hand and figures out when the two alerts should be given. Because the timekeeper must keep looking at her watch, it's hard for her to concentrate on what attendees are saying.

You can use small Tibetan hand cymbals or a struck chime to make the alert sounds. I prefer a chime, since it can be sounded with one hand, while the cymbals need two. If you don't have anything available to make a sound, an extrovert timekeeper can usually be found to say "beep" or something similar.

Two inexpensive digital timers. You can use two inexpensive digital timers to provide audible alerts. Both must have the capability to count down in minutes and seconds (some timers can only count down minutes). Timer A is set to count down the time until the first attendee warning. Timer B can either be started at the same time as Timer A and count down the full attendee time, or it can be set to 30 seconds and started when Timer A sounds. I prefer the second approach, with only one timer running at any moment.

Managing two digital timers is less distracting than using a watch, since once a timekeeper sees that a timer is counting down she doesn't have to keep checking to see whether an attendee's time is up. Unfortunately, most digital timers beep annoyingly while being reset and do not reset themselves to the original countdown time if they are stopped before the time period has expired. This can lead to a lot of distracting beeping whenever an attendee does not use his full time.

A multiple event digital timer. There are a number of digital timers that provide timing of multiple events in a single unit. Most are not well suited to timing a roundtable. Common problems include: having to press multiple buttons to start and reset two event timers, a small display, buttons that become unreliable after a short time, and timers that start to count up after time is up. One unit that can provide the timing flexibility needed is the *Invisible Clock II* from the *Time Now Corporation.* This small unit, which costs about $40, has a countdown timer mode that includes alerts that can be set to go off at any time during the countdown. Its display is tiny, the unit is very complicated to set up, and it has a limited number of alert sounds that it can produce, but it does provide all the timing functionality needed in a compact package.

A computer-based timer. If you have access to a computer, preferably a laptop, you can use it to run timing software that provides all the ideal functionality I listed above. There are plenty of timer programs available for computers running the Macintosh and Windows operating systems, but few provide exactly what we need for roundtable timekeeping. An exception is the Macintosh program *FlexTime* from *Red Sweater Software*. FlexTime, which costs $18.95 and can be evaluated for free for 30 days, allows you to quickly create a custom sequence of a 30-second warning sound and a "time's up" sound. You can use any sound sources you want for the sounds. See the FlexTime sidebar for more details on how to use this program.

I'm not aware of a comparable program for Windows computers. Please contact me if you find one (or write one)!

Digital music player and pre-built audio timing recordings. I have used the FlexTime timer to create a series of audio tracks, available on www.conferencesthatwork.com, that can be played on an iPod or other digital music player through some small portable speakers. This is a convenient way to provide correctly timed alerts for your roundtable. If you are using an iPod, once you have chosen the correct timing track, I suggest you place it in an On-The-Go playlist by itself (highlight the track and press and hold the Select button until the title flashes) so you don't play other neighboring tracks by mistake during the roundtable.

Preparing for two simultaneous roundtables

If you have more than 60 attendees, it's best to hold two simultaneous roundtable sessions. Although this means that each attendee will be able to hear directly from just half of the attendees, the alternative is either a marathon session lasting three hours or more, or unacceptably abbreviated sharing time for each attendee. Short pre- and post-roundtable pair sessions, as outlined here and described in detail in Chapter 25, allow attendees to gain most of the benefits of a single roundtable without being overwhelmed with information.

The ideal setup for running two simultaneous roundtable sessions is to have three rooms, one with classroom seating for the whole group, and two each containing a circle of chairs for half the group. If you don't have this much space available, two rooms will suffice but you'll need to move chairs about in the initial room, changing the seating arrangement from classroom to circle. Don't hold both roundtables in the same space, no matter how large; it's too distracting.

At the end of the conference welcome and introduction, attendees will still be arranged in classroom seating. Use the following outline to prepare for the seating and room changes that will be needed.

- Once attendees have written their answers to the three questions, explain the process for two simultaneous roundtables.
- Pair up people from the same organization and remove them from the classroom seating. Have each pair decide who will be in Group One and Two.
- Split the remaining group into pairs by counting off "A-B." If you have movable seating, the pairs can spread out around the room.
- Have pair members share with their buddy their answers to the three roundtable questions (6 minutes).
- Have the two roundtable groups, A and B, move to separate rooms with circle seating.
- Hold separate roundtables, during which each attendee adds a very brief summary of their pair buddy's answers to questions 2 and 3.
- Return to the initial room and have the pairs get together again.
- Have each pair member summarize for their buddy their roundtable's responses, especially those relevant to their buddy's interests and experience, and share any topics of special interest (8 minutes).

After the roundtable session

The roundtable is usually the longest conference session. When it's over, attendees need a break! If you're holding a morning roundtable, make sure that refreshments are available immediately following the roundtable. Follow an afternoon roundtable with a break and a social with appropriate refreshments.

Preparing for peer session sign-up

The timing and location of peer session sign-up are linked. If sign-up is scheduled during a conference activity, such as lunch, dinner, or an evening social break, the topic sign-up sheets must be posted near the physical location of the session, preferably in the same room or space.

If you're planning to hold peer session sign-up during an outdoor social, you can use free-standing notice boards placed close to where people are gathered. Be prepared to switch to an appropriate indoor location if the weather doesn't cooperate.

Keeping a conference logbook

Maintaining a simple logbook during your conference creates a valuable resource if attendees decide to repeat the conference or you plan to organize more conferences in the future. The logbook needn't be elaborate; a simple ruled notebook will work just fine. For each conference, paste in the conference schedule, and note session timings, protocols and procedures used, problems, ideas for improvements, and what worked, what didn't, and why. Somehow, my memories of such things fade faster than I anticipate, and my conference logbook provides me a way to capture fleeting, and often, in retrospect, important learnings for later review.

Decide how you're going to display the 8.5 × 11 topic sheets. They can be:

- thumbtacked to wall-mounted or freestanding notice boards
- taped to smooth walls
- laid on tables

You'll need *at least* five horizontal inches of notice board or ten inches of tabletop width for each attendee. This provides space for one topic sheet for each attendee, which is usually enough. I prefer to play it safe and put out two sheets for each attendee.

Sign-up tables and notice boards should have at least 10 feet of open space in front of them to allow attendees to mingle and see topics easily. With notice boards, pin up two rows of topic sheets with the dividing line between them about five feet from the ground so they're easily accessible. For tables, remove any surrounding chairs and lay out a single row of sheets around the accessible perimeter of the tables.

Put out plenty of pens, at least one for every two attendees. When using notice boards, hanging the pens from strings keeps them conveniently at hand during sign-up.

Preparing for peer sessions

During the site visit you chose four rooms for holding peer sessions. I've never needed more than four, but, if for some reason you do, you can always use the main roundtable/spective space for an additional group. Setting up these spaces for peer sessions is a matter of making sure that there's adequate seating and a blackboard/whiteboard/flip chart with appropriate working markers. If some of your peer sessions might benefit from computer, overhead, or video projection, set up and test any such equipment that you've arranged to have available.

Set up the initial peer session room seating to encourage discussion. Use chairs set in a circle or rounded square, or around one or more tables in the middle of the room. If a peer session is a presentation or panel, attendees can always rearrange their chairs to support this format.

Also figure out where you'll post peer session schedules once they've been established. Posting locations should include the door of each peer session room, plus refreshment and other gathering areas where attendees may want to know which session is being held in which room.

Steering committee pre-conference meal

The steering committee pre-conference meal—dinner the night before for a morning-start conference, or lunch on the day of an afternoon-start conference—is a time for steering committee members to enjoy good food, drink, and conversation while making any last-minute arrangements and decisions. Take everyone out to the nicest place your budget can afford. This pre-conference time is one of the few perks you can offer steering committee members. Providing a fine meal in pleasant surroundings and good company is small compensation for all the preparatory work and tasks your committee will perform during the conference.

The conference coordinator should create an informal agenda. During the meal:

- Confirm that everyone understands their conference jobs, and that all jobs have people assigned. In particular, determine who will greet incoming attendees at on-site registration.
- Decide whether you'll use a volunteer to start your roundtable session(s), to provide a good model for attendees to follow.
- Make any last-minute practical arrangements.
- Ask and answer any outstanding questions.
- Remind committee members who are facilitating and convening sessions of the importance of starting and keeping the conference on schedule.
- Relax and have fun!

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