

Conference Leaders Training Course



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CONFERENCE LEADERS TRAINING COURSE .

NATIONAL HOUSING AGENCY

~~FEDERAL~~ PUBLIC HOUSING AUTHORITY

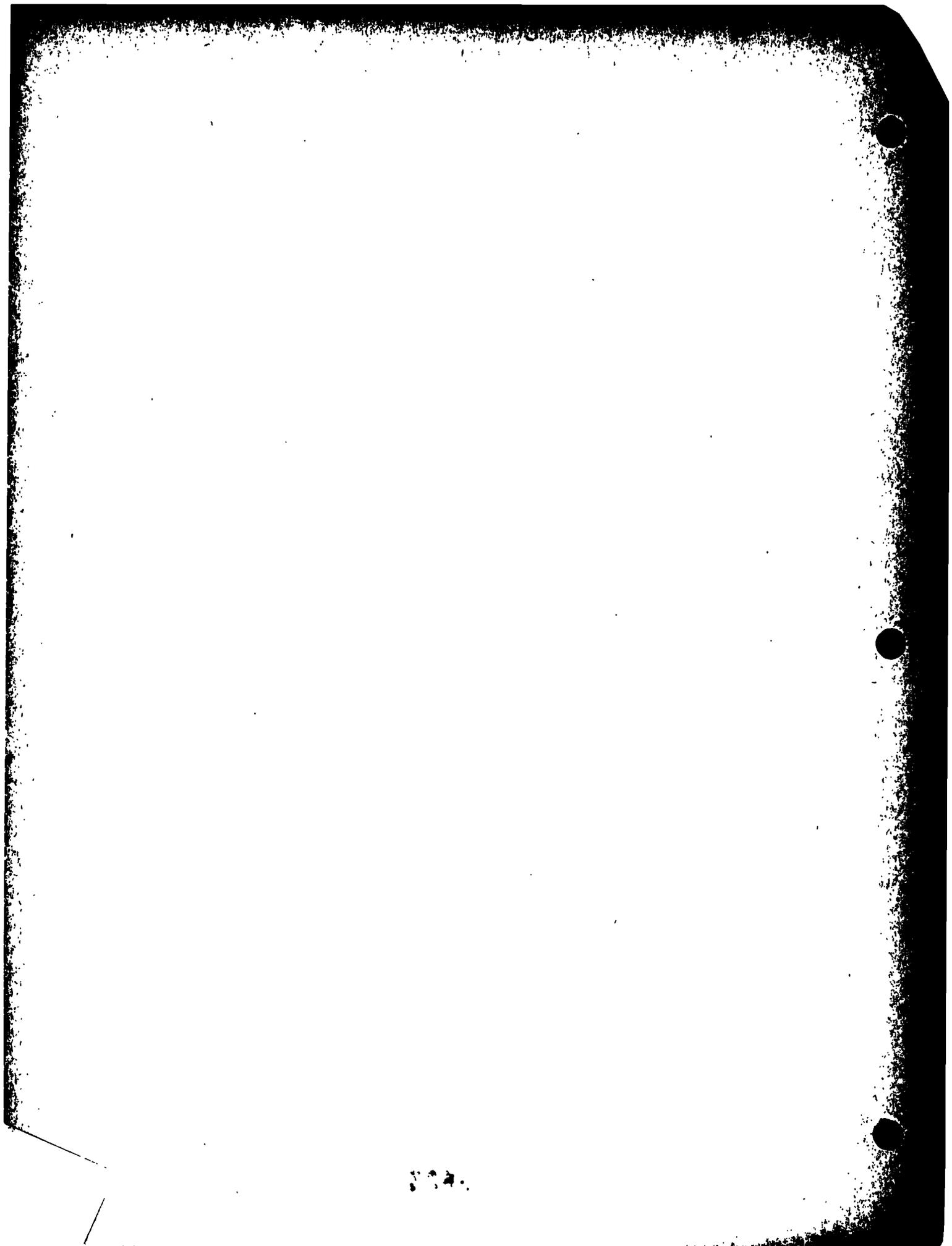
WASHINGTON, D. C.

Training and Employee Relations Section
Personnel Division
Administration Branch

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FOREWORD



FOREWORD

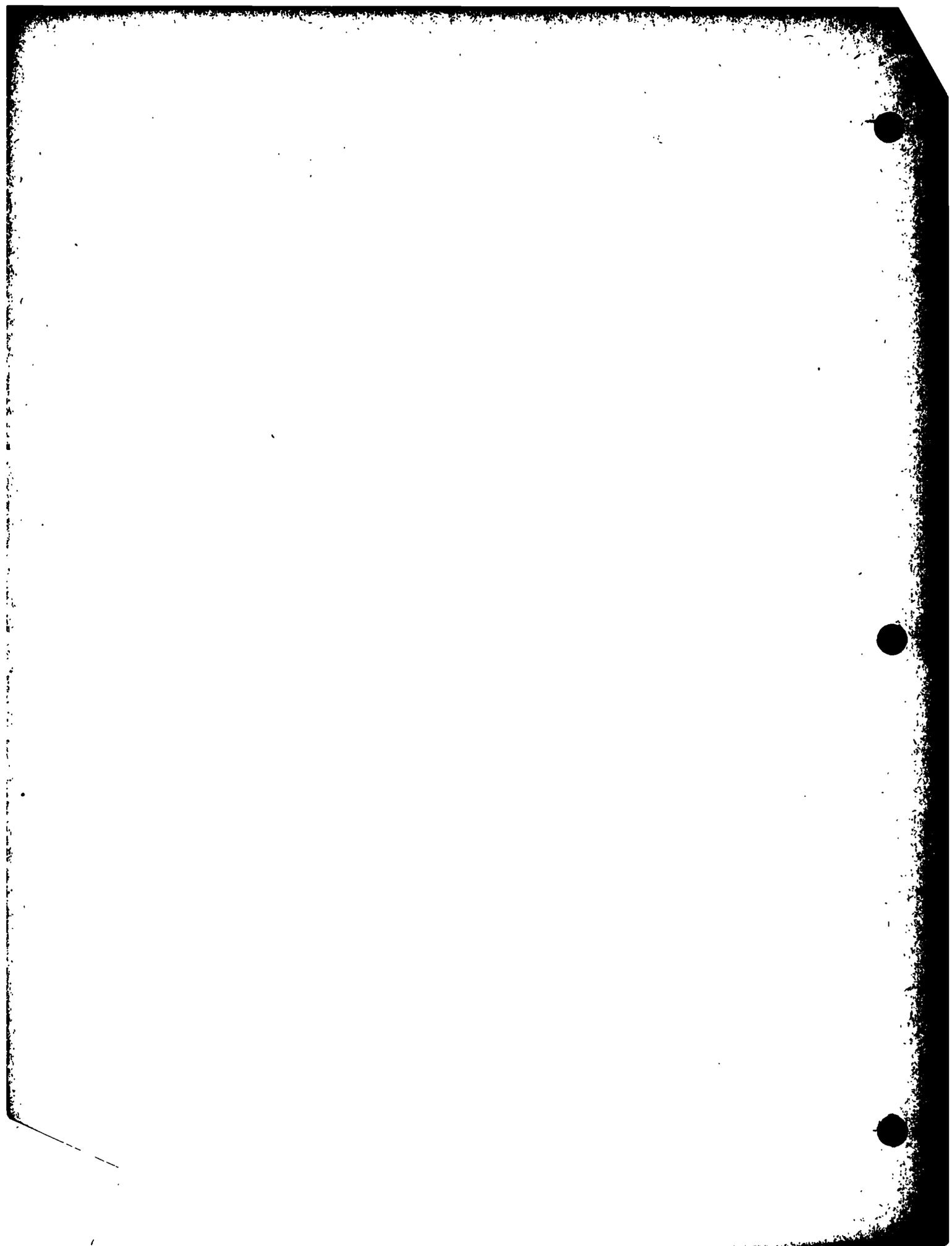
While the conference method of training began slowly to be recognized in this country at about the turn of the century, it has received its greatest impetus and most widespread adoption as an instructional method in the past fifteen or twenty years. It is now widely used in both governmental agencies and in private industry in connection with the training of employes in such general administrative training fields as Supervisor Training, Executive Training and in special phases of Management Training. Its principal advantage lies not only in its provision for, but in its insistence upon, full group participation and discussion, and in the pooling and sharing of the ideas and experiences of employees whose current activity and past experience qualifies them to make valuable contributions for the good of all concerned. When it is realized that this process is carried on under the guidance and control of an informed Conference Leader who is selected for his high qualifications and then customarily trained in a special training course such as that presented in this book, the reasons for the success of this pattern of instruction and its present general use will be apparent.

The topics presented in the pages which follow encompass, in as concentrated and yet as full and adequate a form as possible, all the principles, practices and elements which make for good training by means of the conference method. The series is designed to enable the FPHA to establish a nucleus of well-prepared trainers who can be depended upon to serve all of its offices constructively for the fulfillment of their training needs by prosecuting training programs by means of the conference method in the various fields of their activities. Emphasis is placed throughout on the responsibilities of the Conference Leader, on the importance of advance preparation on his part, and on the techniques of discussion. Suggested standards for the selection of conference leaders are also included.



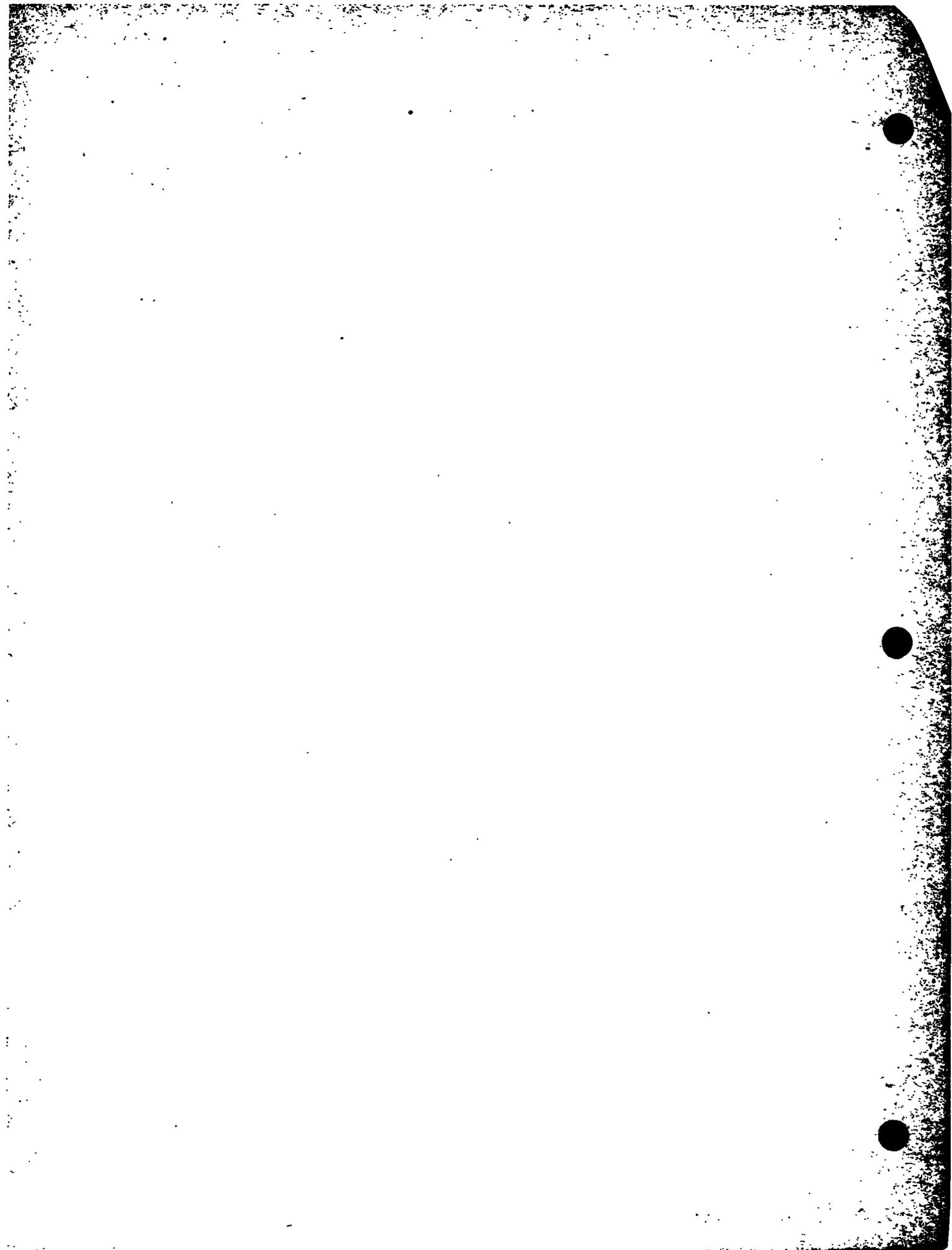
CHARLES G. STERN, Director
Personnel Division

July, 1943



CONFERENCE LEADERS TRAINING COURSE

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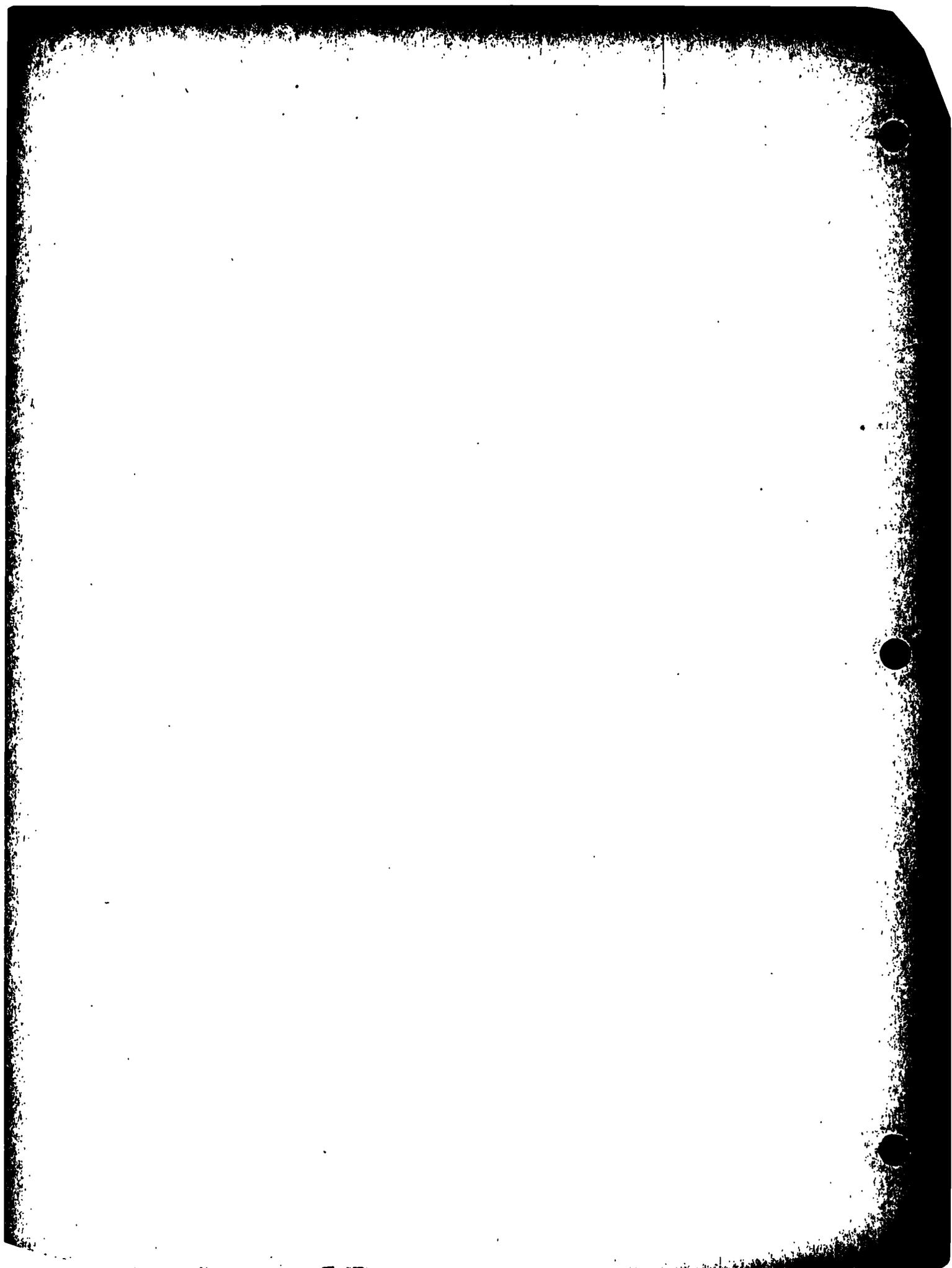
NHA
FPHA
Conference Leaders Training Course
Washington, D. C.

Bulletin No. 47

CONFERENCE NO. 1

The Conference Leaders Training Course
The Concept of the Conference Method of Training

Training and Employee Relations Section
Personnel Division
Administration Branch



Conference No. 1

The Conference Leaders Training Course
The Concept of the Conference Method of Training

Conference Objective:

To develop a preliminary understanding of the conference method of training.

Purpose of the Conference:

1. To survey the purposes and advantages of the Conference Leaders Training Course.
2. To arrive at an understanding of the controller conference by analysis and definition.
3. To survey the advantages of the conference method.
4. To survey the component elements of the conference situation.
5. To emphasize the concept of control and to stress the importance of skill on the conference leaders part.

Introductory Comment:

In the interest of the rapid orientation of his group, and for the sake of brevity and dispatch in getting an understanding of mechanics settled, the leader will do well to explain the process of the conferences which are to compose the present Conference Leaders Training Course. He should mention their number, pass out a list of them to his group, and take a moment to read over the list with the group, pointing out that provision is made at the end of the course for at least two practice conference sessions. He should urge regularity and promptness of attendance, and full participation in discussion, from the first meeting, on the part of all members of the group. He may then pass out the agenda for the present first meeting, indicating that such agenda will be provided for each conference. He will next explain that chart summaries of each meeting will be issued at the end, and that supplementary materials will be supplied to trainees, in the form of outline break-downs of the topic of each conference. These supplementary materials will be valuable as a review guide for the final meeting of the course. He may also mention that charting will be done during each meeting, and that summary wall charts will be exhibited. He should state that at the end of the course a complete set of Conference Leaders Outlines for the Conference Leaders Training Course (similar to the present one, from which he is working - which he may hold up and exhibit to the group), will be made available to interested trainees; and that a Conference Leaders Guide and Manual will be issued.

He will then be ready to move into his conference paper, and proceed in accordance with the Discussion Plan.

Discussion Plan

In this opening meeting, it will be necessary for the leader to hold the group a little longer before proceeding to discussion, but he should endeavor to cover the suggestions of the Introductory Comment and the opening elements of the Discussion Plan (in the form of remarks) as rapidly as possible. His conference proper may begin with a frank statement of the purposes of the present Conference Leader Training Course. (It will probably not be necessary to chart these on the blackboard.) He should emphasize the significance of a real understanding of the true conference method for all executives and supervisors, both in the course of their regular duties and in special training connections. With respect to valuable training now going forward in FPHA, he should emphasize the primary need for the understanding and practice of the conference method. He may also mention the advantages to individuals in connection with the modern training movement, and with respect to desirable certification for training, and with regard to the materials accruing to them from the course, from the agenda through the final issue of the Conference Leaders Guide and Manual.

The leader may, if he desires, spend some time in eliciting ideas from the group as to the probable advantages to them from such a course, but he should not devote too much time to this method. He should move on with some dispatch toward the major elements of discussion centering around the concept of the conference method.

After a few very brief remarks on the history of the conference idea and method, (see Supplementary Materials), the leader will proceed into full group participation on the main subject of his conference by eliciting ideas from group members as to what the controlled conference is not, and develop the elements of Chart I with this title.

He may ask, "Is a forum a controlled conference?" "Why not?" "How does it differ from a controlled conference?" (and so on, with similar questions on the other types of presentation.) Or he may state, "A frequent method of training is a talk given by an expert or specialist followed by open discussion and questions from the floor". He may

then ask, "Is this a conference?" "If not, why not?" "Is it a forum?" etc., etc.

With statements or questions such as these he should have no difficulty in developing Chart I rather rapidly, and in leading directly into the formulation of Chart II, Ideas as to What the Conference Method Is.

He may then summarize the items of these first two charts, and then with the group, arrive at a list of definitions, and a summary definition, in Chart III, Definition of the Conference Method.

He may then swing directly into a discussion with the group on the advantages of the conference method, and develop Chart IV, Comparison of Advantages and Disadvantages of Various Training Methods. Advantages of the Conference Method. (He may ask directly for statements of advantages and disadvantages from the group in this connection.)

The leader will then ask for ideas as to what the group believes to be of central importance in a successful conference. ("What is essential to a well conducted and successful conference?") Things like preparation, planning, outline, the informed leader, etc., will all be advanced; and probably the idea of control of discussion will be forthcoming. When it is, the leader should lead off from it and develop Chart V, The Concept of Controlled Discussion. Why Control is Important.

He may then elicit ideas for Chart VI, Preliminary Devices for Control, by asking direct questions of the group, or by pointing up the necessity for control by telling an incident (from experience, or hypothetical) of what can happen to the group and to the conference when control lapses.

The leader may then ask the group to think over and analyze out all the component elements that enter into the conference situation, and so develop Chart VII, the Elements of the Conference Situation. The leader himself should take the initiative in summarizing the reciprocal relation and relative importance of these elements for the group, after the chart has been fully developed.

He may then swing back, by way of a concluding emphasis for all the central discussions of his conference, by referring to the earlier development of things which are essential to a successful conference, and ask for contributions on the role of the leader, to develop the concluding Chart VIII,

The Role of the Conference Leader - His Central Importance.

The leader will then summarize the conference briefly by alluding to the definition of the conference, the concept of controlled discussion, and the central importance of the conference leader.

Conclusion of Conference

The leader will then allude to Conference No. 2 on The Prosecution of the Training Conference - General; and suggest that the major items of the first conference will be discussed in detail in subsequent meetings.

NOTE: It is understood that all the charts (I through VIII) indicated in the foregoing Discussion Plan will be developed from the group, and charted on the black-board by the leader; and that at the conclusion of each chart development, the proposed wall chart on the same subject will be exposed for group summary and tying-in of the items covered.

Before dismissing his group, the leader will distribute:

- Chart Summaries (consisting of mimeographed copies of the proposed charts)
- Supplementary Materials (consisting of notes on the history of the conference method and of an outline break-down of the topic of the conference for review)
- References (consisting of a brief list of books on the Conference Method)

(The agenda and Course Outline - List of Topics - will have been distributed at the beginning of the meeting)

CHART SUMMARIES

Conference No. 1

Conference Leaders Training Course

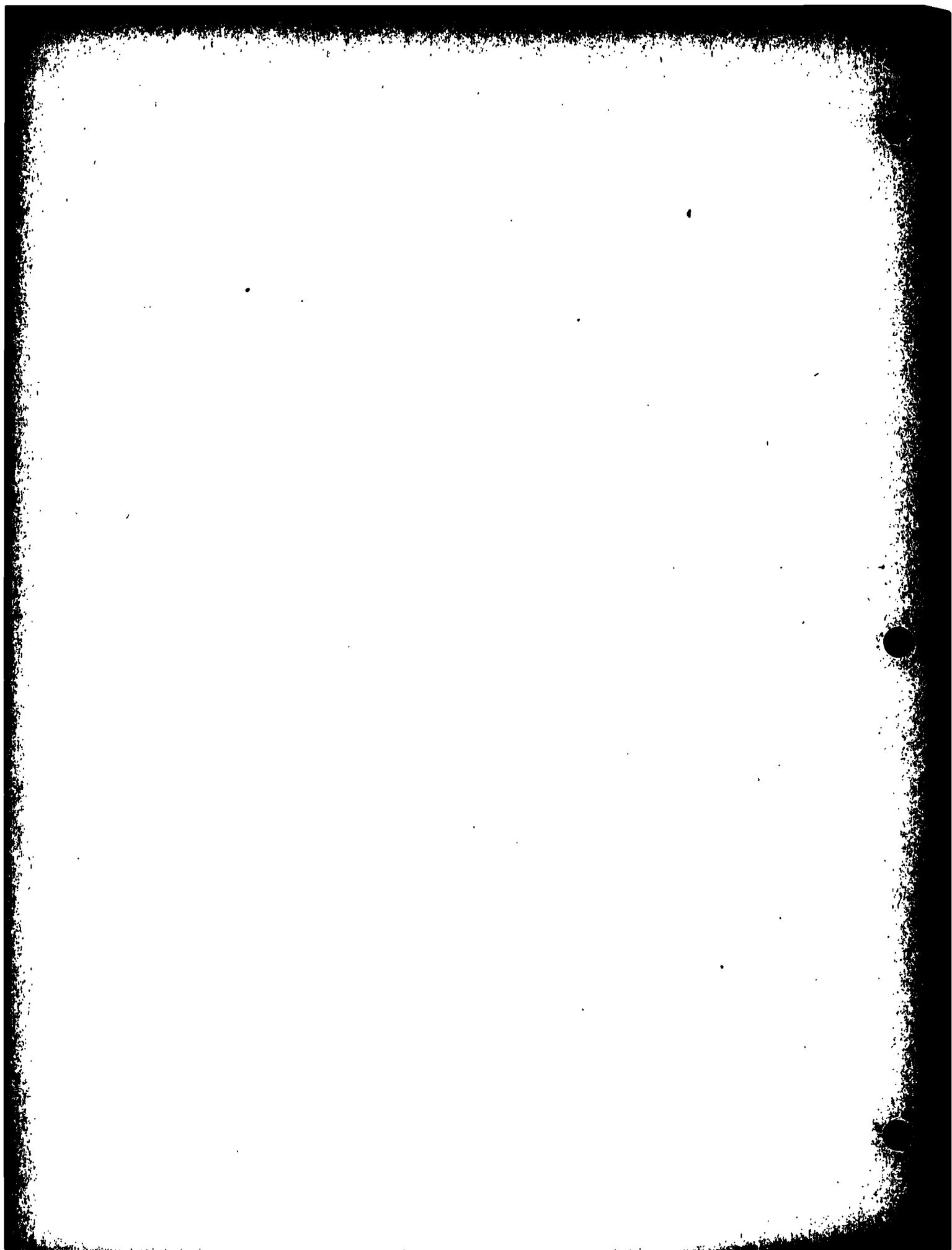


Chart I

What the Conference Method is Not

(Other methods of teaching or presenting materials)

The forum	
The instructional method	
The class-room recitation	
The panel discussion	
The lecture	Characteristics
The debate	of each of these
The individual tutoring method	
The "talk by a specialist followed by open discussion and questions from the floor"	
The applicatory system (problems)	
The showing of slides and films	
The system of memorizing and reciting	

In what respects does the conference method differ from these?

Chart II

Ideas as to What the Conference Method Is

- Predominantly a group situation and process.
- 4. an informal relationship.
 - 4. process of discussion.
 - 4. sharing and pooling of ideas and experiences.
 - 4. process subject to guidance.
 - 4. process subject to control.
 - 4. process which is directed toward a definite objective couched in terms of specific purposes.
 - 4. process which has a skilled and informed leader for control, guidance, and direction.
 - 4. process with objectives and purposes set beforehand, and appropriate techniques outlined in advance.
 - 4. process for stimulating thinking, generating discussion, obtaining understanding, importing new knowledge, and reaching practical conclusions relative to action.

Chart III

Definition of the Conference Method
(Adapted from Webster)

- conference - a meeting for consultation and discussion
method - a definite system of procedure
control - restraining or directing influence
discussion - the process of sifting or examining by presenting considerations pro and con
conference leader - one who exercises a restraining and directing influence over a conference
informed leader - one who knows or is acquainted with subject and method

Summary Definition

The term "conference" is defined as a meeting in which all members participate in the discussion of a specific topic under the guidance and control of an informed leader who has determined prior to the meeting the direction in which he wants to go.

Chart IV

Comparison of Advantages and Disadvantages of Various Training Methods

Advantages of the Conference Method

Methods of Presenting Material:

	<u>Advantages</u>	<u>Disadvantages</u>
The Forum	<ol style="list-style-type: none"> 1. Chance for discussion 2. Opportunity for clarification 3. Wider range of opinion 	<ol style="list-style-type: none"> 1. Too much domination by leader 2. Unguided discussion 3. May result in lack of interest
The Class-room	<ol style="list-style-type: none"> 1. Gives opportunity for clarification of points 	<ol style="list-style-type: none"> 1. Teacher-pupil atmosphere 2. No discussion
The Panel Discussion	<ol style="list-style-type: none"> 1. Presents different points of view from authorities 2. Participation of audience 	<ol style="list-style-type: none"> 1. Limited amount of time for audience to participate 2. Unwieldy
The Lecture	<ol style="list-style-type: none"> 1. Presents new material 2. Presents maximum material 3. Presented in an organized and directed form to meet the objective 4. Teaching method 5. Permits emphasis 6. Given by authority 7. Intellectual stimulation 	<ol style="list-style-type: none"> 1. One man's opinion 2. Lack of group participation 3. Depends too much on individual personality 4. Does not provide for individual capacities 5. Lack of opportunity for review and clarification of specific points 6. Glamour may soon fade
The Applicatory System	<ol style="list-style-type: none"> 1. Permits consideration of actual problems 2. Compels individual work 3. Ensures solution 	<ol style="list-style-type: none"> 1. Problems must be limited in number 2. Requires much outside work 3. Of limited use in varied group
Slides and Films	<ol style="list-style-type: none"> 1. Material always the same 2. Individuality of teacher does not intrude 3. Economical of time 	<ol style="list-style-type: none"> 1. Costly 2. Used by themselves permits little discussion 3. Cannot be readily adapted to special conditions

Chart IV (continued)

Methods of Presenting Material:

	<u>Advantages</u>	<u>Disadvantages</u>
Instructional Method	<ol style="list-style-type: none"> 1. Precise instructions teaching on a particular subject by a qualified expert 2. Thoroughness and authoritative aid. 	<ol style="list-style-type: none"> 1. Limited group participation 2. Restriction of attention, interest and application to circumscribed facts or ideas.
The Debate	<ol style="list-style-type: none"> 1. Complete presentation of opposing sides of a controversial question. 2. Opportunity for formal rebuttal. 	<ol style="list-style-type: none"> 1. Lack of group participation 2. Too great arbitrariness of topic choice. Possible lapse of interest.
Individual Tutoring Method	<ol style="list-style-type: none"> 1. Close attention to individual needs. 2. Opportunity for questions and probing exhaustion of the lesson of material. 	<ol style="list-style-type: none"> 1. Lack of the stimulation of sharing. 2. Circumscribed range of attention 3. Rapid fatigue.
"The Specialist followed by open discussion and questions from the floor"	<ol style="list-style-type: none"> 1. Presentation of subject by an expert. 2. Clarification of points of interest. 	<ol style="list-style-type: none"> 1. Depends too much on the personality of the speaker. 2. Tendency to too much dominance by one individual. 3. Limited group participation.
System of Memorizing and Reciting	<ol style="list-style-type: none"> 1. Considerable retention of material. 2. Check on extent of learning. 	<ol style="list-style-type: none"> 1. Lack of analysis, criticism, and thinking. 2. Lack of individualization.
Conference Method	<ol style="list-style-type: none"> 1. Permits pooling of experience to solve supervisory problems. 2. Stimulates individual's desire to think, talk and discuss problems common to the group. 3. Involves an active and contributing attitude on the part of those present. 	<ol style="list-style-type: none"> 1. Limits presentation of factual material. 2. Danger of "Loose thinking".

Chart IV (continued)

Methods of Presenting Material:

	<u>Advantages</u>	<u>Disadvantages</u>
Conference Method	<ol style="list-style-type: none">4. Provides means for better interpretation of the policies and procedures of FEHA.5. Presents a cooperative opportunity for promoting and developing the common interest of supervisors and management.6. Tends to develop uniform thought from hazy diverse ideas.7. Gives supervisors an opportunity to make suggestions and recommendations to the Administration for improving administrative procedure and policies.8. Discussion is controlled.9. Breaks down pupil-teacher attitude.10. Opportunity for review through board work.	

Chart V

The Concept of Controlled Discussion

Why Control is Important

Control - "a restraining or directing influence"
Is the group necessarily able to control its own
discussion?

What control does -

Preserves harmony

Conserves time

Keeps the discussion moving

Keeps it on the right track

Motivates the group

Provides for the inclusion of all members of
the group

Alone makes possible the achievement of the
objective of the conference and the
fulfillment of its purposes

Summarizes and "teaches"

00801

Chart VI

Some Preliminary Devices of Control

Prepared outlines
Charts
Questions
Statements
Attention-getting devices
The group

Chart VII

The Elements of the Conference Situation

- The topic - its nature and scope
- The leader - his experience, training
and skill
- The group - its size and character
- The secondary aides
 - prepared outlines
 - charts
 - supplementary materials
- The physical arrangements and situation-
effect and influence
- The devices used - nature and variety

Chart VIII

The Role of the Conference Leader

His Central Importance

The leader's role is chiefly stimulation (motivation), direction, and control

He should:

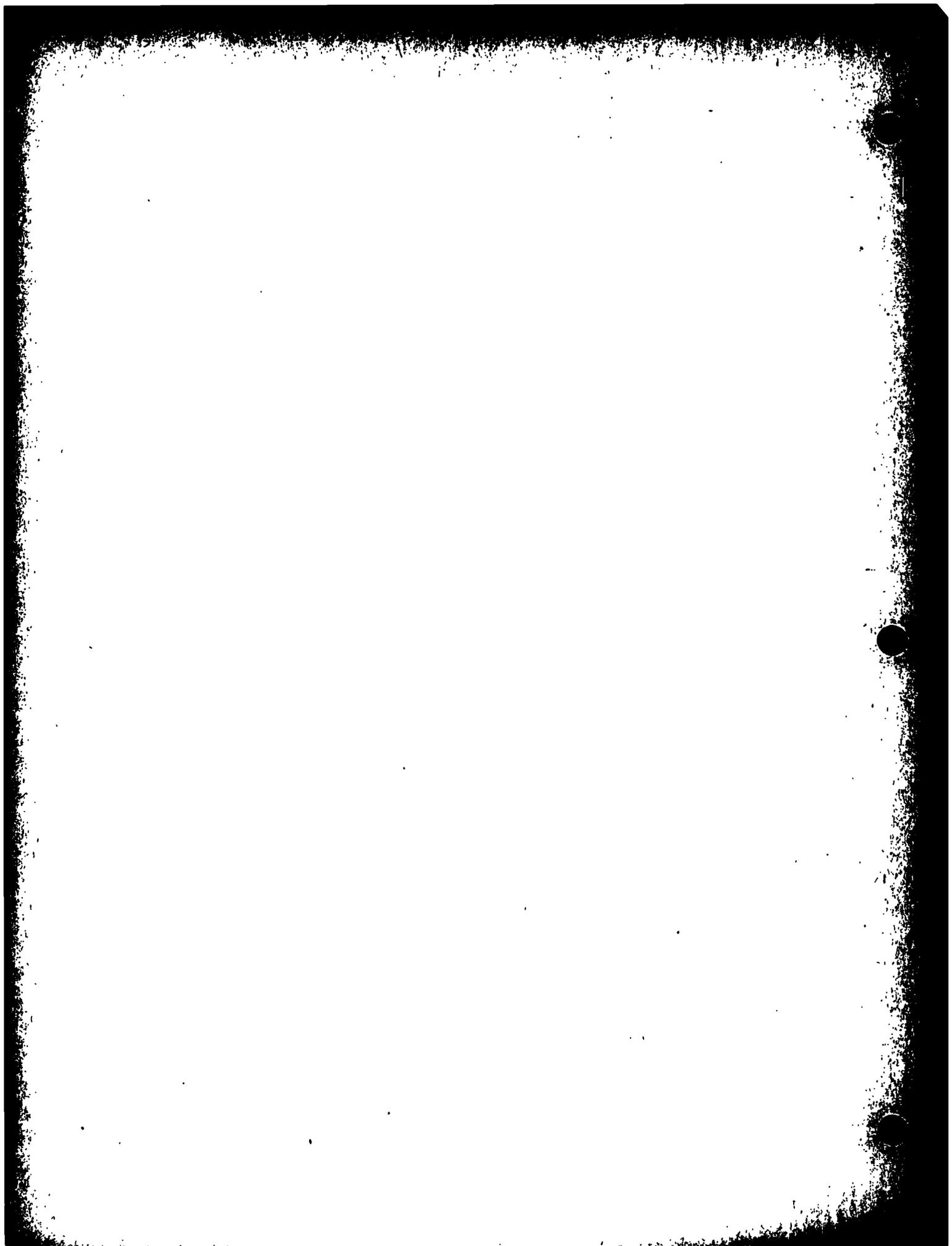
- be thoroughly prepared
- have at least a working knowledge of the subject
- understand the conference method
- learn to know his group quickly
- consciously develop his skill as a conference leader
- be convinced of the value of his efforts

How important is the leader to the success of the conference?

References

Conference No. 1

Conference Leaders Training Course



Conference No. 1The Conference Leaders Training CourseThe Concept of the Conference Method of TrainingReferences in Training and Related Fields

a. Some Standard Texts in the General Management and Personnel Fields:

1. Tead, Ordway, and Henry C. Metcalf - "Personnel Administration" - Its Principles and Practice - New York - McGraw Hill Book Co., Inc., (330 W. 42nd St.) - 1933 (third edition, revised) - 519 pp. \$4.00.

An outstanding text book on personnel administration, discussing problems and attitudes as well as facts.

2. Scott, Walter D., Robert C. Clothier, and Stanley B. Mathewson - "Personnel Management" - Principles, Practices and Point of View - New York - McGraw-Hill Book Co., Inc., - 1931 (second edition) - 583 pp. \$4.00.

A standard work on personnel management, especially good in its treatment of hiring, rating, and training.

3. Viteless, Morris D. - "Industrial Psychology" - New York - W. W. Norton Co., Inc. (70 Fifth Ave.) 1932 - 652 pp. \$5.30.

A comprehensive text covering all phases of industrial psychology. Specific problems are discussed clearly and thoroughly.

4. Lescohier, Don. D. - "History of Labor in the United States" - 1896-1932 - Vol. III - Working Conditions - Labor Legislation, by Elizabeth Brandeis - New York - Macmillan Co. - 1935- 778 pp. \$4.50 - Vol. IV - Labor Movements by Selig Perlman and Philip Taft - 1935-683 pp. \$4.00.

A comprehensive survey of the development of organized labor and labor legislation in the United States since 1896. These two volumes complete the series begun by John R. Commons and associates.

5. Laffingwell, W. H. - "Textbook of Office Management" - McGraw-Hill Co., Inc., City - 1932 \$3.00.

6. Yoder, Dale - "Personnel and Labor Relations"
New York - Prentice-Hall, Inc. - (70 Fifth Ave.)
1938 - 644 pp. \$5.35

A study of the status and functions of personnel administration in the light of recent labor trends. Particularly helpful in its discussions of techniques and presentation of sources of more detailed information and current statistics.

b. References on Training

1. Walton, Albert - "New Techniques for Supervisors and Foremen" - McGraw-Hill Co., 330 W. 42nd St. - 1940 - See chapters 1-2-3-10 and appendix 1.
2. Tead, Ordway - "Human Nature and Management" - McGraw-Hill Co., Inc., 330 W. 42nd St. - 1929 - chapters 4-10-16.
3. Diemer, Hugo - "Foremanship Training" - McGraw-Hill Co., 330 W. 42nd St. - 1929 - See chapters 1-6-7-14.
4. Foster, Orline D. - "Stimulating the Organization" Harper Bros., New York - 1923 - See chapters 2-6-7-.
5. Allen, Charles R. - "The Foreman and His Job" - J.B. Lippincott Co., Philadelphia - 1922-entire book.
6. Allen, Charles R. - "The Instructor, The Man, and The Job" - J. B. Lippincott Co., Philadelphia - 1919 - entire book.
7. Scott, Walter Dill - "Increasing Human Efficiency in Business" - Macmillan Co., New York, 1911 - See chapters 12 and 13.
8. Cushman, F. - "Foremanship and Supervision" - Wiley, New York, 1938.
9. Walser, G. - "Art of Conference" - Harpers, New York, 1933.
10. Beckman, R.O. - "How to Train Supervisors" - Harpers, New York. 1940
11. Cooper, Alfred M. - "How to Conduct Conferences" McGraw-Hill, New York, 1942.
12. Greene, James H. - "Organized Training in Business" New York - Harper Bros. (49E33d St) 1937 (revised edition) - 350 pp. \$4.00

A thoroughly revised edition of a standard

work on industrial training. Contains a valuable new chapter on training needs and methods in collective bargaining.

13. Reitell, Charles - "How to be a Good Foreman"
New York - Ronald Press Co. (15 E. 26th St.)
1937 - 186 pp. \$1.50.

Considers the foreman's problems as those of the department manager, and discusses his responsibility in relation to employee supervision, technical efficiency, and cost control.

14. Gardiner, Glen - "How to Handle Grievances"
Elliott Service - 1937 (219 E. 44th St) NY
52 pp. 25¢.

c. Some Periodicals in the General Management and Personnel Fields:

1. "Public Administration Review"
American Society for Public Administration
1313 E. 60th St., Chicago, Ill. \$5.00 per year quarterly. Contains articles by well known figures in the field of public administration discussing subjects of general and immediate interest. Of benefit to those members of the training staff who are concerned with the development of training courses for executives.
2. "National Safety News"
National Safety Council, Inc., 20 North Wacker Drive, Chicago, Illinois \$4.00 per year - monthly. Contains current developments in all phases of first aid, safety, and accident prevention. Of benefit to the First Aid Training staff in keeping posted on new techniques and current statistics.
3. "Personnel"
American Management Association, New York City \$2.00 per year - quarterly. Contains articles by acknowledged authorities concerning the field of personnel management including personnel training. Of benefit to the staff in keeping abreast of training activities, new ideas, and development of techniques in other organizations.
4. "Advanced Management"
Society for the Advancement of Management, Inc. Quarterly - 29 W. 39th St. New York City.
5. "Supervision" - Supervision Publishing Co., Inc.
95 Madison Avenue, New York City

6. "Personnel Journal" - Monthly - Public Personnel
Research Foundation - 60 E 42nd St., New York City
Ed. C. S. Slacombe

d. Some Associations

1. American Society for Public Administration
1313 East 60th St., Chicago, Illinois
2. American Management Association
330 West 42nd St. New York City
3. National Safety Council, Inc.
20 North Wacker Drive, Chicago, Illinois
4. National Industrial Conference Board
247 Park Avenue, New York City
5. Council for Personnel Administration
Government - 1626 K Street, NW, Washington, D. C.
6. National Association of Manufacturers
Industrial Building, Washington, D.C.

e. Some Outstanding Names in the Modern Training Field

Tead
Clothier
Metcalf
Cushman

Mathewson
Gardiner
Allen
Carlson

Cooper
Beckman
Walser

AGENDA

Conference No. 1

The Conference Leaders Training Course

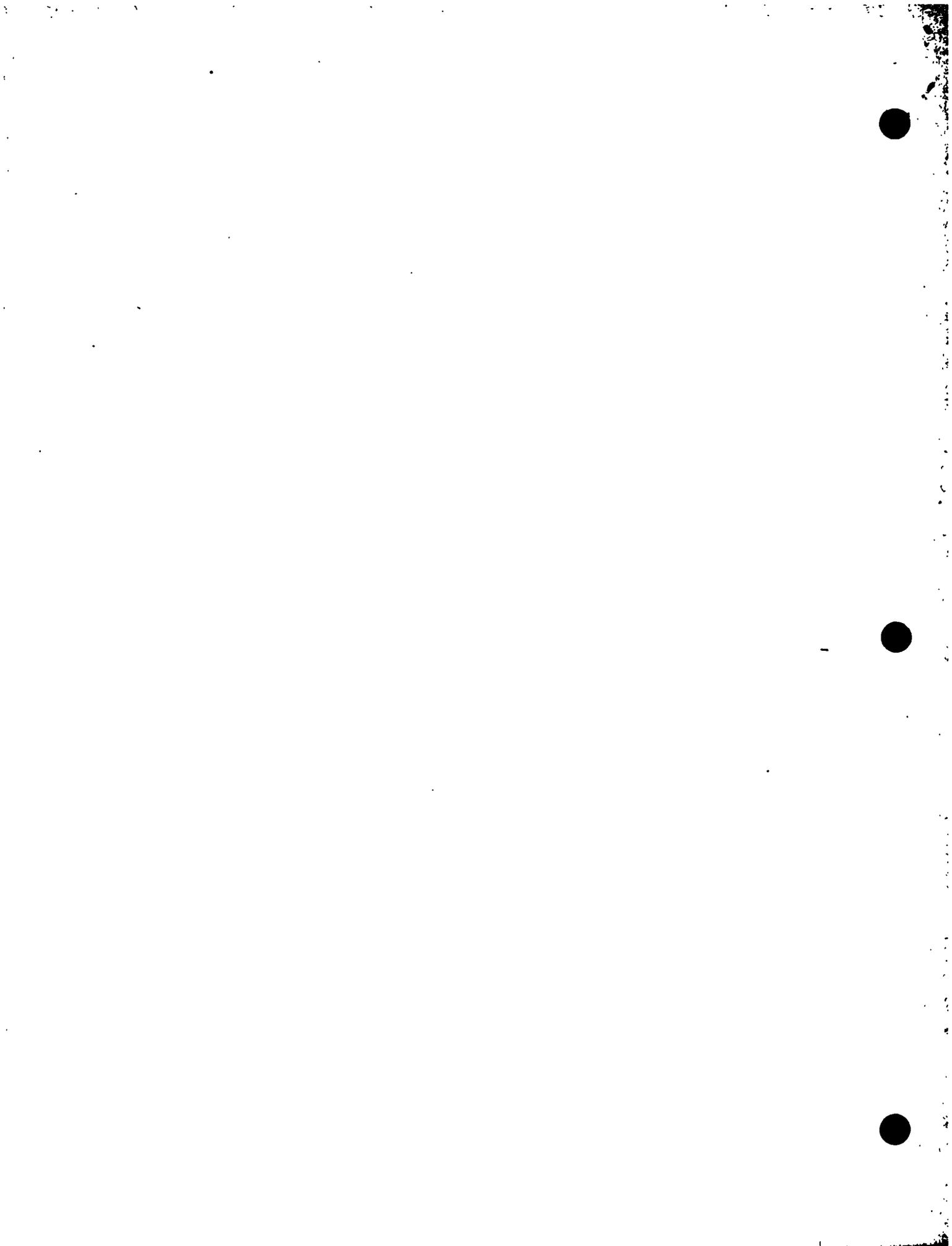
The Concept of the Conference Method of Training

Conference Objective:

To develop a preliminary understanding of the conference method of training.

Purpose of the Conference:

1. To survey the purposes and advantages of the Conference Leaders Training Course.
- 2.. To arrive at an understanding of the controlled conference by analysis and definition.
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5. To emphasize the concept of control and to stress the importance of skill on the conference leaders part.



Supplementary Materials

Conference Leaders Training Course

Outline of Topics

Conference No. 1

Introductory Topics

The Conference Leaders Training Course.

The Concept of the Conference Method of Training.

Orientation and basic assumptions and purposes of the Conference Leaders Training Course.
Advantages of the Conference Leaders Training Course.
Certification.

History of the conference idea and method.

What the conference method is not.

Ideas as to how the conference method differs from these things.

Ideas as to what the conference method is.

Definitions of: Conference
method
control
discussion
conference leader
informed leader

Advantages of the conference method.

Chart comparison of advantages and disadvantages of various methods.

The central concept of controlled discussion.

Some devices of control.

The elements of the conference situation - their reciprocal relations - the topic - the leader - the group - secondary aids (prepared outlines; charts; supplementary materials) - the physical arrangements and situation; the devices used.

Emphasis on the importance of the leader and his role - training in conference leadership being the purpose of this course.

Allusion of Conference No. 2 on the Training Conference and hints as to topics of the course.

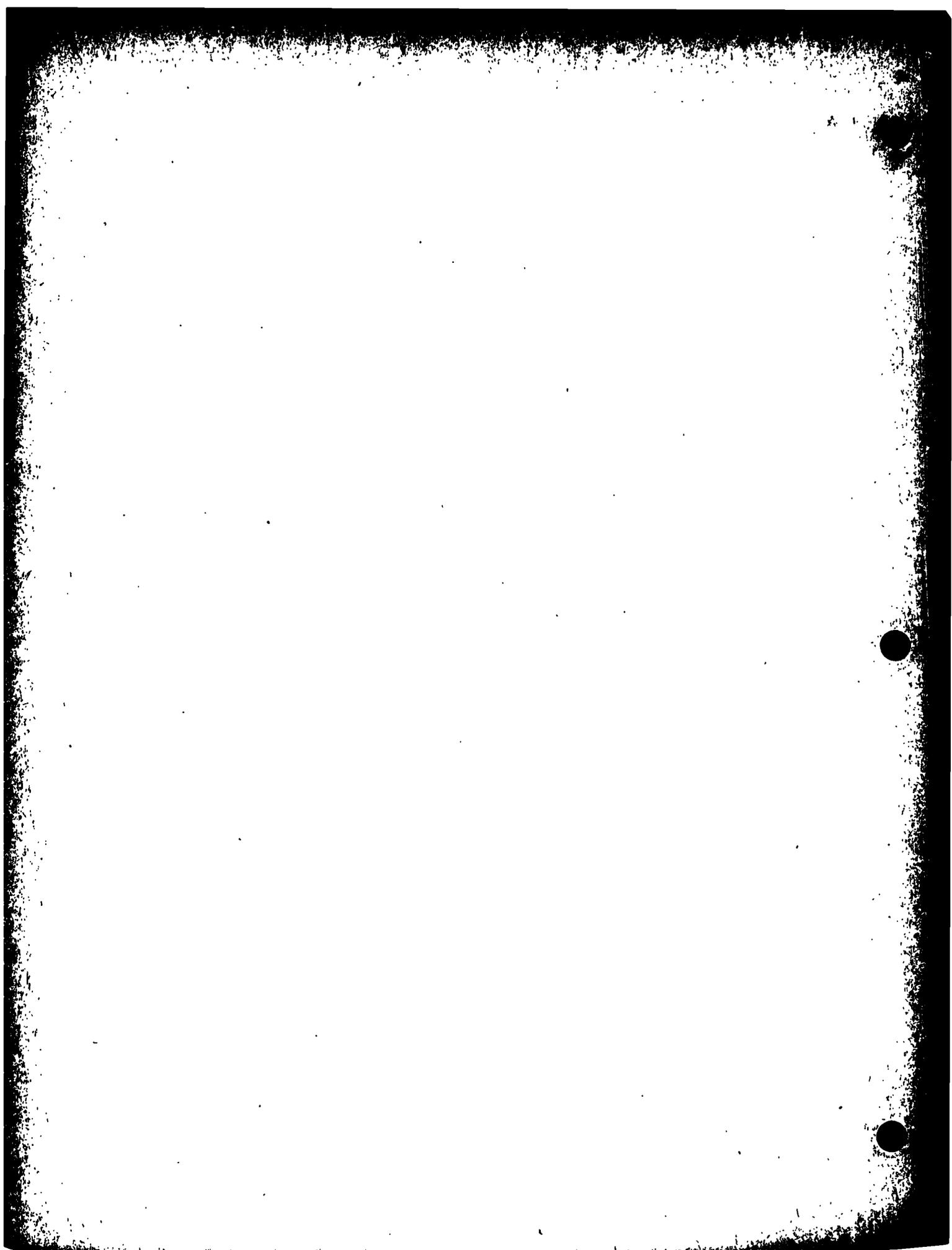
Chart Summaries)

References)

Agenda) For issue for Conference No. 1

Supplementary materials)

Course Outline - for course as a whole.



A NOTE ON THE ORIGINS OF THE CONFERENCE METHODSOCRATES 469 B. C.---399 B. C.

Analytic, skeptical, drawing out method of teaching.

His philosophy and his method of teaching in Plato's Dialogues---The Apology, The Euthyphro, The Lysis, The Protagoras

The philosophy of Socrates was based on:-

- (1) A firm conviction of the absolute reality and necessity of Virtue:--
- (2) A belief that the one true way to virtue was knowledge and:--
- (3) The resultant conviction that knowledge of things human, of ourselves, is the first essential of wisdom and goodness alike.

No man would willingly choose evil if he could see the remote consequences of his act as clearly as the immediate end to be gained. The trouble lies in an inadequate perspective, a careless and ignorant trusting to appearances, an inability to see the remote thing as clearly as the thing near by and therefore obvious. The need is for a sort of moral art of measurement, ability to see the truth without being influenced by the accident of nearness or remoteness, simplicity or complexity. Clear, unconfused sight of truth is wisdom. As a result of such a belief the teaching of Socrates was perpetual effort to get his pupils to see things as they are. Not by giving new material, not by giving them his ideas, but by stimulating them to see for themselves the falsity or inadequacy of their own knowledge, did he hope to see them grow wiser and therefore better.

The formation of conceptions, constitutes the sum of the whole teaching of Socrates.

Writing cannot adapt itself to the different state of mind of different persons. It cannot answer questions, reply to objections, rectify misunderstanding..

The Apology #01

Methods of teaching in the last analysis depend upon the acts of mind involved in the sense experience and thought.



Conference No. 2

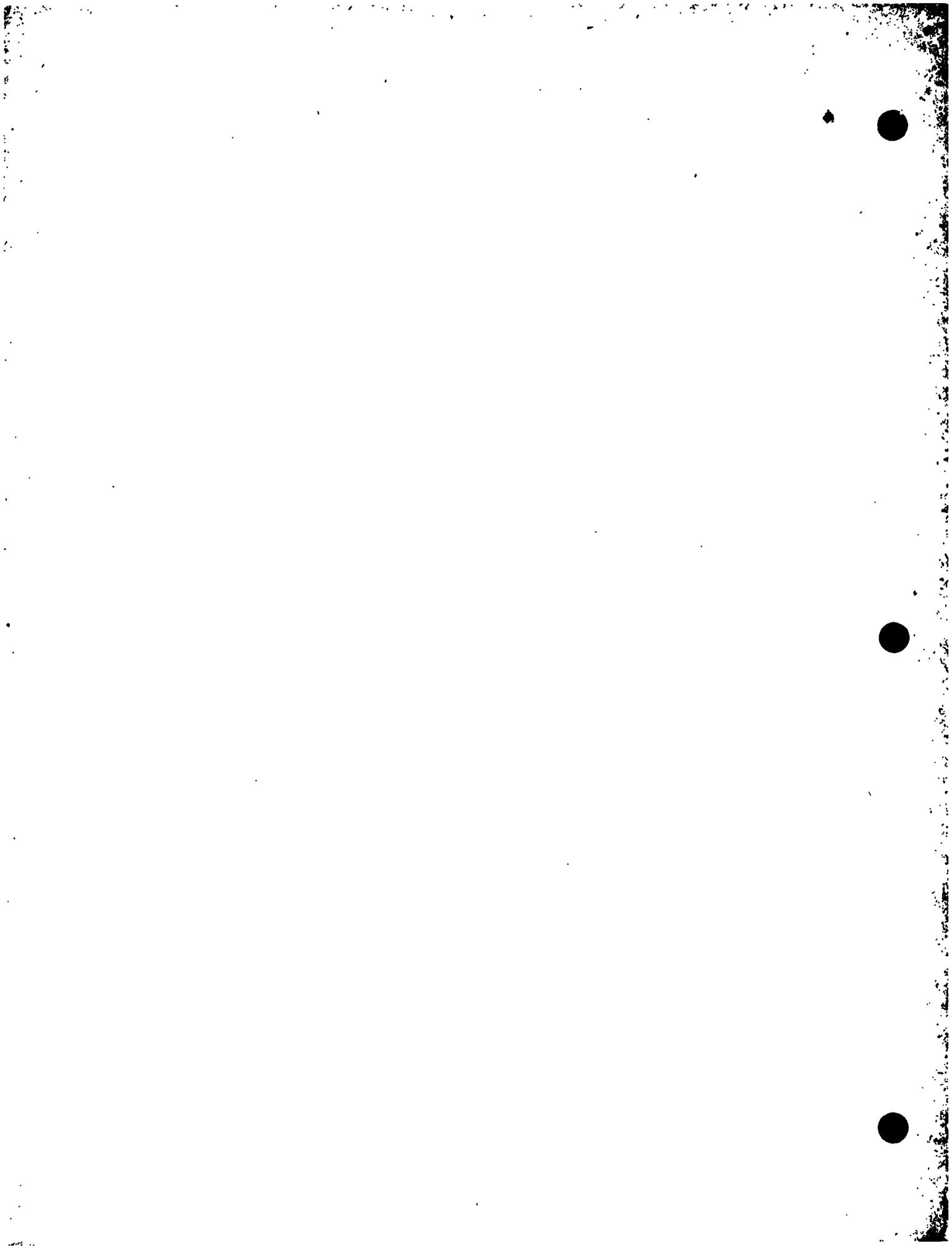
The Prosecution of the Training Conference

General

Training and Employee Relations Section

Personnel Division

Administration Branch



Conference Leaders Training Course
Washington, D. C.

Conference No. 2

The Prosecution of the Training Conference
General

Conference Objective:

To gain an understanding of how the training conference is prosecuted.

Purpose of the Conference:

1. To determine a desirable perspective on training for the leader and the group.
2. To survey four essential steps of thinking in their bearing on conference practice.
3. To determine the duties and the attitude of the leader.
4. To survey the make-up, attitude and psychology of the group.
5. To emphasize the importance of summarizing (for retention and carry-over into action on the part of the group); and to stress the importance of advance preparation on the leader's part.

Introductory Comment:

With regard to the handling of a series of conferences comprising a full course or program, the importance of retrospective allusions to foregoing conferences, and of advance allusions to forthcoming conferences, on the part of the leader, cannot be over emphasized. This device makes for clarity, emphasis, orientation of trainees, and knitting together of the relationships of all the elements of the course as a whole.

The leader will therefore do well, in beginning this conference, to allude to the major ideas of Conference No. 1 on The Concept of the Conference Method of Training, and run over a brief summary of these. He may elicit points from the group in this connection, if he wishes; but he should not in any case dwell too long on this review; and he may handle it entirely, himself, for emphasis and time-saving.

He may then refer to the objective and purposes of the present conference on The Prosecution of the Training Conference. He will pass these out to his trainees, in the form of Agenda, at the beginning of his present

meeting, and he may take a moment to read them over with the group.

To set the stage for his conference proper on the subject of Conference No. 2, he will do well to reiterate particularly the elements of the conference situation, as surveyed in Conference No. 1, (the topic - the leader - the group - the secondary aides - the physical arrangements - and devices used).

He will then be ready to proceed toward his major discussion, in accordance with the suggestions of the Discussion Plan.

Discussion Plan:

The leader may begin by leading his group to an appreciation of the importance of themselves having, as prospective training leaders, (and of generating in their trainees, in whatever training they may in turn be called upon to give), an objective, overall perspective on the training process they are participating in, both as a personnel service to them, as an opportunity for them, and as a part of an overall organization policy program, course and topic sequence, having definite objectives, directed toward the most practical results possible, in terms of increased efficiency, greater production, and improved employee morale, as reflected in the work and bearing of employees. He may then elicit advantages of training, and cite, or get from the group, examples of specific programs or courses and their advantages. He will thus, with the group, develop Chart I, Overall Objectives of Training, and Examples of Specific Programs and Advantages.

(The leader may suggest, in connection with the discussion of the advantages of training, that at a later point in the present course - in Conference No. 5 on Techniques some consideration may be given to the question of the extent to which the practical results of training are measurable.)

Then, with a brief transitional reference to the primary need of the group for the stimulation or motivation, and guidance of its thinking, (in order that contribution and discussion will be forthcoming), the leader will survey with the group the four steps of thinking for each of the purposes of the conference as planned, and to develop Chart II, Four Steps of Thinking in Conference Procedure.

He may then care to pause for a brief movement of summary and settling-in of the idea of his conference up to this point. He will then proceed directly and rather rapidly, and with vitality, to eliciting from the group, a clear sequence of ideas for Chart III,

The Duties of the Conference Leader: and, himself suggesting that the fulfillment of these duties presupposes a certain set of attitudes on the part of the leader, he may carry forward directly with the development of Chart IV, The Attitude of the Leader. ("What would you say are some necessary attitudes on the leaders part, in order that he may fulfill these duties satisfactorily?" "To what extent should he school himself to become conscious of these attitudes in himself?" etc.)

He should then ask a series of questions leading to the formulation of Chart V, The Make-up, Attitude, and Psychology of the Training Group, such as: "Should the training group be homogeneous in character, with regard to the work, offices, activities, status, and experience of its constituent members?" "Should it be heterogeneous in these respects?" "Should official superiors of various levels, and corresponding personal subordinates, be scheduled in the same groups?" "If so, to what extent?" "Are all groups of the same character?" "Do you think it would be possible to distinguish a 'group personality', as it would appear to a leader dealing regularly with diverse groups through the topics of a full course or program?" "Are groups as groups likely to be slow? intelligent and interested? loud and aggressive? resistant? mild and gentle? etc."

The leader should be in a position to strengthen this discussion by citing from his own experience the often surprising reality of the characteristics, or personalities, of separate training groups along these lines.

After Chart V has been developed satisfactorily, the leader should indicate that these characteristics of groups, as a whole, as well as those of individual types of trainees (which will be considered later) will be related to the consideration of appropriate techniques, at a later point in the course (in Conference No. 5, Discussion Techniques).

The leader may then proceed to chart off, rather rapidly, with the group, a concluding series of miscellaneous subjects relating to the general prosecution of the training conference, as in Chart VI, Miscellaneous Items. He should round out the development by emphasizing the importance of advance planning and preparation on the part of the leader, alluding in this connection to the next Conference No. 3 on The Preparation of the Conference Leaders Outline; and then draw his present conference to a conclusion by summarizing for, or to some extent with,

the group, the leading ideas of Conference No. 2, as just covered.

Conclusion of Conference:

He will then distribute his Chart Summaries and his Supplementary Materials for this meeting, and be prepared to dismiss his group.

NOTE: The prepared wall charts will have been turned up, after the development of each chart with the group in the conference, for emphasis and clarification, in the usual way.

Chart Summaries
Conference No. 2
Conference Leaders Training Course

Chart I.

Overall Objectives of Training

Examples of Specific Programs, and Advantages

All Training should be directed toward practical results, in:

- Increase in efficiency
- Greater production
- Improved employee morale

(Consider to what extent practical results are measurable. Is it essential that they should be measurable?)

Some Examples of Types of Training

Advantages

Executive Training

The gaining of a first-hand, practical education in the principles, policies, requirements, and practices of large scale public administration and management, in all its phases.

Fulfillment of overall objectives.

(Compare paid university courses in this field, and expensive text books in the field, with the advantages of practical training in administration bearing on the daily job.)

Supervisor Training

The gaining of practical first-hand instruction in how to handle people - the human relationships basic to good management.

Greater knowledge of the organization and of the bearing of one's particular office on the total job.

Greater knowledge of specific practices, devices, short-cuts, and requirements.

Training in the elements of true leadership.

Achievement of the overall objectives.

Job Training of Various Kinds

Increase in technical knowledge

Improvement in specific skills

Higher qualifications for development

Achievement of overall objectives

Chart II

Four Steps of Thinking
(for each objective to be gained)

1. The presentation of the problem
clarity - with brevity yet completeness - leader
understanding - on part of group
2. The assembling of facts (or ideas)
bearing on it
control of completeness and relevancy - leader
contribution of facts, ideas, and experiences -
group
3. The evaluation and judging of facts and ideas
discussion - group
control and guidance - leader
4. The decisions (or "Agreements") as to action
the group
summarized by the leader

Chart III

The Duties of the Conference Leader

1. Start discussions.
2. Keep discussions going.
3. Have all members contribute.
4. Keep out of arguments.
5. Keep the discussion on the right tract.
6. Avoid making decisions for the group.
7. Sense when the objective is attained.
8. Attempt to convert dissenting members.
9. Summarize and terminate discussions.

Chart IV

The attitude of the Conference Leader

1. Show an interest in the group.
2. Be enthusiastic about outcome.
3. Exercise patience with conferees.
4. Assist others to clarify their ideas when necessary.
5. Be tactful.
6. Display a sense of humor.
7. Be sympathetic.
8. Be willing to appreciate the views of others.
9. Maintain Poise.

Chart V

The Make-up, Attitude, and Psychology of the Training Group

<u>Group</u>	<u>Disadvantage</u>	<u>Advantage</u>
The homogeneous group	Lack of diverse experience and wider viewpoints.	Equal interest and understanding and sharing of common problems.
The heterogeneous group	Possible lack of mutual interests. Possible lack of understanding in discussion.	Problems presented and treated from diverse points of view and with diverse application. Wider range of experience probable.
Subordinate and superior combination (questionable)	May work in a negative direction, engendering fears and resistences.	May engender understanding and mutual helpfulness. Improve rapport and morale.

Other types of groups

<u>Type</u>	<u>General Approach</u>
The bright, active, and responsive group.	Direct positive approach in motivation and interest getting.
The resistant, antagonist group.	The indirect, 'negative' approach toward motivation and interest
The slow, apathetic group.	The steady, patient, persistent, drawing out approach; appeal to particular most responsive individuals.

Chart VI

Miscellaneous Items

(On the General Prosecution of the Training Conference)

Elements the leader may count on, use, and appeal to:

- The general gregariousness of human beings - their innate liking for getting together in groups.
- The general garrulousness of human beings - most people like to talk.
- The general (norman and natural) egotism of human beings - most people like to talk about themselves, or at least about their own interests.

These are in themselves fundamental and powerful motivations, regardless of the form or direction they may take; and the adroit leader will depend upon them for the natural basis of his conference procedure.

Summarizing:

Summarizing makes for:

- clarity
- emphasis
- orientation
- transition
- retention of the part of trainees

It should be practiced regularly.

Summarize developments on:

- Individual topics or subjects
- Specific conference purposes
- Conference Objective

The success of the conference depends on:

- The thoroughness of the conference plan
- The skill of the leader in his technique

The leader must be informed - hence planning and preparation is essential.

Supplementary Materials

Conference Leaders Training Course

Outline of Topics

Conference No. 2

May, 1943

The Prosecution of the Training Conference - General

Allusion to Conference No. 1 - on the Concept of the Conference Method of Training.

Summary of major ideas of Conference No. 1.
Review of the elements of the Conference situation and their reciprocal relations - the topic - the leader - the group - the secondary aids - the physical arrangements - the devices used.

Necessity for objectivity to the whole training process on the part of the leader and the group - their mutual realization of the training process they are participating in, and their overall relations to it.

Things for the leader to bear in mind and for the group to realize and remember - the overall objectives of the course as a whole - its probable advantages to them. Examples of courses and advantages.

The objective of the present conference.

The specific purposes of the present conference.

The primary need to stimulate and guide thinking, which will lead to contribution and discussion.

The four steps of thinking for each of the objectives to be gained.

1. The presentation of the problem.
2. The assembling of facts bearing on it.
3. The evaluation and judging of facts.
4. The decisions as to action.

The duties of the leader.

The attitude of the leader.

The make-up, attitude, and psychology of the group.

Elements for the leader to count on and use.

The importance of summarizing.

Ideas as to what the success of the training conference most depends on.

The importance of planning and preparation - the informed leader.

Summary of the present conference.

Allusion to Conference No. 3 - The Preparation of the
Conference Leaders Outline.

Chart Summaries)
Agenda) for issue to conferees on
Supplementary) Conference No. 2
materials

Agenda

Conference Objective:

To gain an understanding of how the training conference is prosecuted.

Purpose of the Conference:

1. To determine a desirable perspective on training for the leader and the group.
2. To survey four essential steps of thinking in their bearing on conference practice.
3. To determine the duties and the attitude of the leader.
4. To survey the make-up, attitude, and psychology of the group.
5. To emphasize the importance of summarizing (for retention and carry-over into action on the part of the group); and to stress the importance of advance preparation on the leader's part.

Conference No. 3

The Preparation of the Conference Leaders Outline

Training and Employee Relations Section

Personnel Division

Administration Branch



Conference No. 3

The Preparation of the Conference Leaders Outline

Conference Objective:

To gain an understanding of the technique of the preparation and use of the Conference Leaders Outline.

Purpose of the Conference:

1. To stress the importance of advance planning, and to indicate the need for thoroughness, in substance and detail.
2. To survey the role of the conference leader.
3. To determine the means of gathering, organizing, and writing up material.
4. To determine methods of indicating devices for the leader to use, and to plan charting.
5. To survey the mechanics, form and contents, and rhetoric of the Conference Leaders Outline.
6. To survey the qualifications required for the preparation of good outlines, and to review the forms of supplementary materials prepared and issued.

Introductory Comment:

The leader will as usual issue his agenda for this meeting and take a moment to run over them with the group.

Reference may then be made to the conclusion of the foregoing Conference No. 2 on The Prosecution of the Training Conference at which the importance of advance planning on the part of the leader was stressed. The leader may in this connection briefly run over with his group, the four steps of thinking in the conference situation, and ascertain how these are related to planning the conference and to pre-arrange devices for control and guidance on the leaders part. This treatment will form a direct transitional introduction to his present conference and enable him to move smoothly with the group into his conference proper.

Discussion Plan:

The leader may begin, rather directly and rapidly, and with as much vitality as possible, with an open group discussion as to some of the general components of the conference plan. He may care to pose an approach to this discussion by asking

such leading questions as "What would be likely to happen here today if I had not planned this meeting for you at all?" "Or if we had only a vague idea as to what we wanted to discuss today about preparing an outline?" "What basic function must a leader always perform for his group?" (control and direct), "What then are some of the things he will need in his conference outline in order to provide for control and direction?" Thus the leader will be able to develop Chart I - General Components of the Conference Outline. He will do well to review the definition of the "Conference" in this connection, eliciting the definition from the group; and he will want to stress repeatedly the ideas of control and direction, and the need for detail and thoroughness, ("Why?" To anticipate exigencies and to provide for a complete, adequate, and well-rounded treatment and conference.)

He may then proceed to eliciting ideas from the group as to the relationship of the conference leader to the subject matter of the conference itself and of the course as a whole. "Must the leader have a thorough, complete, and professional knowledge of the subject?" "Need he be an expert?" "Can he be entirely ignorant of it, and still lead a successful conference on it?" "What is desirable, in this connection?" "To what extent then, ought the leader to know the subject material of the conference or course?" "Are all types of materials and subjects necessarily amendable to treatment or handling by the controlled conference method?" "If not, name some that may not be, and show why not," "Why is the conference method used and recommended for the training of people who are doing jobs in the public administration field?" "What is usually the relation of the qualified leader's knowledge of material to his conference handling in this field?" "How does this compare with the conference method in job training in factories?" "With the instructor in anatomy in a medical college?" "Can you name some types of material in the public administration field, and indicate in general the extent to which they may be amendable to conference handling?" "The relation of the leader to knowledge there?" "The constitution and experience of the group in this connection?" "Are the bearings and the peculiar advantages of the conference method in certain situations again apparent?" (Review reference to Chart IV, Conference No. 1)

In this way the leader may lead the group to the development of Chart II - The Conference Leader and the Subject.

He may then swing directly into a discussion of sources of material for the preparation of the outline, and means of gathering it. He should in this connection emphasize as fully as possible the primary responsibility of the leader for guaranteeing the soundness or authoritativeness of his material, for its detail and adequacy, for its accuracy and up-to-dateness. He should stress the importance for the leader of minimizing and avoiding as much as possible, the "bookish" library, theoretical, academic, or the slightest inflationary approach to the material of his conference. He should emphasize the desirability of using practical, day-by-day, working materials and problems, almost exclusively, as the subject matter for his conference training.

(The leader will do well at this point to take a moment, himself, to discuss the relation of method to substance, emphasizing the absolute basic importance of method, yet at the same time pointing out that the leader is obligated, on the score of mental honesty, to provide, first and foremost, substance, content, "meat" and practical materials for his trainees. Method, while most important, must be kept in perspective, and related properly and proportionately to substance. Its treatment must not be overdone, or its bearing inflated to the point where substance is seriously threatened, as an escape from substance, as is frequently done.)

From questions in this discussion, ("What should characterize the material formulated by the leader in his conference outline?" "What are his sources?" etc., etc.) the leader will develop Chart III - The Material of the Conference.

He will then discuss with the group the miscellany of points which must be considered in making the outline, and chart off Chart IV, Requirements for the Preparation of the Conference Leaders Outline.

He should then discuss charting separately, and stress its importance as a fundamental conference method or device for control, direction, attention, contribution, and retention, on the group's part. He may ask, "Why is charting important?" "What are some of the types of charts?" etc., in formulating Chart V - Charting the Conference.

He may then prepare a formal summary chart, showing the formal mechanics and parts of the outline, with an indication of the nature of the contents of the parts, Chart VI - The Mechanics, Form, and Contents of the

Conference Leaders Outline. The leader may, if he wishes, give this directly to the group, himself, as a contribution, outlining it on the board for his trainees and noting that it is an approved type of handling which has long demonstrated its value in practice. The leader may at this point pass out, and demonstrate a typical, previously prepared and fully developed Conference Leaders Outline, as a sample. He should allude also to Chart I of this Conference - The General Components of the Conference Outline, and point out their integration in Chart VI.

He should then hold a brief discussion on the rhetoric of the outline, emphasizing the importance of good order, balance, and completeness, and with the group, formulate Chart VII - The Rhetoric of the Conference Outline.

He may then enlist the group's aid in charting off the capacities needed for the preparation of the outline, and develop Chart VIII - Qualifications for the Preparation of Outlines. ("Can anyone necessarily prepare a good outline?" "What abilities, qualities, and mental characteristics are necessary and desirable for this work?" etc.)

He will then be ready to stress the very great importance of supporting the Conference itself, for the sake of clear understanding and stimulation of trainees, and for essential retention of fact and impression on their part, by the use of the strongest possible, yet proportionate, series of supplementary materials, for visual use and distributions, for each conference, and develop these with the group in Chart IX - Supplementary Materials to the Conference Leaders Outline.

(The leader will as usual have exposed and run over the prepared wall charts on this series at the conclusion of each group chart development in the conference.)

Conclusion of the Conference:

The leader may now draw his conference to a conclusion by summarizing its highlights briefly from his outline, and by stressing the importance and responsibility of the leader for preparing his own outline for each conference.

He will then issue his Supplementary Materials and Chart Summaries, allude to the next ensuing Conference No. 4 on The Introduction to Techniques - Principles of Learning in the Conference Situation, and so dismiss his group.

Chart Summaries
Conference No. 3
Conference Leaders Training Course

Chart I

General Components of the Conference Outline

Conference title or subject
Introduction
Statement of aims or purposes
Order of steps or parts
Details
Examples
Problems
Major subjects
Subordinate subjects
Indication of methods or devices to be used
Questions
Charts
References
Illustrations
Demonstrations
Summaries
Allusions and associations
Suggestions, advice, facts
Directions
Concluding points
Supplementary materials, for
reference and issuance

Chart II

The Conference Leader and the Subject

Must the leader have a thorough, professional knowledge of the subject:	Not necessarily
Must he be an authority, or expert in it himself?	Not necessarily
Can he be entirely ignorant of it, and still lead a good conference?	Conceivable, possible, (Depends upon his subject the composition of the group, and the experience and skill of the leader, as a conference leader.)
Is complete ignorance of the subject desirable?	No
Does the expert or authority always make a good conference leader in the subject?	No
What is desirable?	Some knowledge of the subject on the part of the leader, and skill in conference leading.
How much should he know?	Better than a nodding acquaintance. A <u>good, practical, working knowledge</u> . (Not necessarily expert or complete.
What, in regard to the subject, ought he to have, in addition to a working knowledge of it?	An <u>understanding</u> of its relations and importance, an appreciation of its typical problems, and its significance in the overall administration.
Sources?	He should know the sources of knowledge in the subject.
Details?	He need not <u>know</u> very many of them; but he should be able to assimilate them quickly and <u>secure</u> ; appraise, and integrate them, in relation to the subject.
16360	The concept of the <u>informed conference leader</u> .

Chart III

Material of the Conference

The material of the conference (subject matter) should be:

Authoritative	Adequate
Accepted	Up-to-date
Approved	Clear-out
Sound in practice	Practical
Accurate	Systematic
Detailed	Complete (for the purposes of the conference)

Sources - official, approved, authoritative

Manuals	General Orders
Handbooks	Authoritative texts and studies
Circulars	References

Consultation with experts

Materials to be gathered together:

Reports	Charts
Plans	Graphs
Memoranda	Descriptions (etc. <u>from</u> practicing offices and sources)
Outlines	

Thorough study of materials and references sources

Organization of materials:

Selection	Blocking off
Delimiting	Arranging

Casting into Conference Outline form

Writing up - of Conference Leaders Outline

Method - must be understood and used, as most important; but must be kept in proportion and perspective.

Substance (content) - most important.
(Substance must never be sacrificed to method)

Responsibility - the Conference Leader is responsible
for his material in all these respects.

Chart IV

Requirements for the Preparation of the Conference Leaders
Outline

Material

Blocking off
Delimiting
Arranging
Writing up
Emphasis and subordination

Outline

Determination of main objective
(What do you expect to accomplish?)
Purposes
Other parts

Treatment of Topic

Suitable title for conference
Sequence of topic (in course)
Alignment of items for discussion
Devices for initiating and controlling discussion
(Questions - Statements - Examples)
Extent of development
Detail
Summaries of items and of conference as a whole

Supplementary Materials

Form
Amount (proportionate)
Use (review - reference - retention)

Chart V

Charting the Conference

Use of:

Chart frames
Paper
Crayone (plain & colored)
Flackboard & chalk (plain & colored)
Writing
Lettering

Requirements

Neatness
Legibility
Good arrangement on board or chart paper
Adequacy and proportion (extent)
Brevity and clarity of expression
Speed in charting
Preservation or erasing
Charting and attention
Charting and controlling discussion

Some types of charts

Key-word and concept charts
Item charts
Outline charts
Organization charts
Functional charts
Flow charts
Summary charts

Chart development (leader and group)

Prepared Wall Charts - use and value
(form and make-up)

Chart VI

The Mechanics, Form, and Contents of the Conference Outline

The complete pattern:

Title page - showing -

Agency designation
Course designation
Location
Number of the Conference
Title of the Conference
Office where prepared
Date

First page - showing -

Agency designation
Course designation
Location
Number of the Conference
Title of the Conference
and the following major parts

Conference Objective -

A statement of what is expected.
to be accomplished.

Purpose of the Conference -

A numbered listing, in the order
of their treatment in the conference,
of the specific purposes or ends to
be achieved through the prosecution
of the conference. (This parallels,
but is not usually stated exactly
like, or is necessarily exactly
synonymous, with the chart series
of the conference.)

Introductory Comment -

Suggestions for the leader as to
how to open, lead into or intro-
duce, his present conference
meeting, or transition it from
foregoing meetings. Use of agenda
and other materials.

Discussion Plan -

A complete and detailed treatment
of the steps and methods to be

Chart VI (continued)

used, in order, with unity and emphasis, for developing the substance of the conferences. Suggested devices for initiating, controlling, and directing and terminating discussion. Statement and questions for the development of charts. Things to emphasize. Allusions and associations. Incidental references. Statements. Facts. Cases. Examples. Transitions. Order of development. Type and extent of treatment. Detail. Outline of chart sequence. Use of wall charts. Use and issuance of materials. Summary suggestions.

Conclusion of the Conference -

Suggestions as to how best to draw the conference to a conclusion. The issuance of chart summaries and supplementary materials.

Suggested Mechanics not included in the Conference Leaders Outline:Attendance -

Taken at each meeting (by passing out a sheet of paper for signature)

Card file record of trainees -

Attendance - (Space for remarks) recorded

Reports on training -

(as required by conference leaders supervisor)

Use of Conference Leader's Self-Analysis and Self-Development Charts periodically.Issuance of Certificates for training

Chart VII

The Rhetoric of the Conference Leaders Outline

The Conference Leaders Outline should have:

Unity - It should deal consistently and appropriately with one subject - the topic of the conference.

Coherence - It should be arranged in logical order, as to its parts or sub-topics.

Emphasis - Important parts should be given more weight than secondary items.

Balance - It should be arranged in a well distributed and well proportioned pattern of treatment and detail.

Development - A progressive and accumulative development toward the achievement of the objective of the conference.

Chart VIII

Qualifications for the Preparation of Outlines

High intelligence
Ability to write clearly and directly
Ability to assimilate material (subject
matter) rapidly
Ability to integrate details rapidly
Ability to analyze
Ability to distinguish essentials from
non-essentials
Ability to concentrate
Ability to read rapidly
Ability to organize and arrange materials
for conference handling
Energy
Interest and enthusiasm
Good judgement and self confidence
Independence of mind and action

Chart IX

Supplementary Materials to the Conference Leaders Outline

Agenda - for orientation

Chart Summaries - for review and retention

References - for study and reading

Outlines - for review and retention

Statements - for facts and instruction

Expository accounts - for detail and review

AGENDA

Conference No. 3

The Preparation of the Conference Leaders Outline

Conference Objective:

To gain an understanding of the technique of the preparation and use of the Conference Leaders Outline.

Purpose of the Conference:

1. To stress the importance of advance planning, and to indicate the need for thoroughness, in substance and detail.
2. To survey the role of the conference leader.
3. To determine the means of gathering, organizing, and writing up material.
4. To determine methods of indicating devices for the leader to use, and to plan charting.
5. To survey the mechanics, form and contents, and rhetoric of the Conference Leaders Outline.
6. To survey the qualifications required for the preparation of good outlines, and to review the forms of supplementary materials prepared and issued.

Supplementary Materials

The importance of advance planning for the individual worker; for the supervisor; particularly for the Conference Leader; for the general.

The necessity for thoroughness, to prepare for all possible exigencies - related to the primary requirement of control of the conference.

The Conference Leader in relation to the subject matter of the conference.

The gathering of material; consultation with experts; reference to sources.

Blocking off and delimiting the material.

Determination of the main objectives of the conference (What do you expect to accomplish).

Sequence of the individual topic and possible relation to a total course, to preceding and succeeding conferences, and inclusion of allusions to these.

The determination of subordinate objectives or purposes. Allignment of items for discussion. Determination of devices for initiating discussion on each item.

Detail. Method and extent of development of each item. Chart development on blackboard or charting paper. Charting of key words and concepts. Advance preparation of complete reference charts.

Devices to be used in charting. Variation in types of charts. Extent of charting. Use of wall charts. Summary of items. Summary of conference as a whole. Range of associations.

The mechanics of the Conference Outline.

The form and contents of its parts.

The rhetoric of the Conference Outline.

The responsibility of the conference leader for preparing his own outlines.

Qualifications for the preparation of outlines

The use and form of agenda

The issuance of chart summaries and supplementary materials

Examples of complete conference outlines	}	for issuance in Conference No. 3
Chart Summaries		
Supplementary Materials		

NHA
FPHA
Conference Leaders Training Course
Washington, D. C.

Bulletin No. 47

Conference No. 4
Introduction to Techniques
Principles of Learning in the Conference Situation

Training and Employee Relations Section
Personnel Division
Administration Branch

Conference No. 4

Introduction to Techniques

Principles of Learning in the Conference Situation

Conference Objective:

To gain an understanding of the processes of learning in the conference situation, and to learn the proper methods to use in prosecuting training conferences.

Purpose of the Conference:

1. To survey the learning process and related methods in the conference situation.
2. To study motivation and related psychological factors.
3. To study and define interest, and devices for generating it.
4. To survey the proper use and exploitation of the group, and to stress the importance of using the group.
5. To study and define attention, and devices for securing it.
6. To assay the role of the leader and his awareness in these connections.

Introductory Comment:

After the agenda have been distributed and surveyed, the leader may wish to suggest, or lead the group to suggest, that the foregoing Conferences No. 1 through 3, were largely informative and in a sense preparatory to this Conference, No. 4, and to the ensuing conferences, through No. 6, and into the practice conferences, through No. 9 -- all of which will deal more directly with the conditions and requirements of the active conference situation itself. In other words, the training group is now moving from a process of understanding to a grasp of action and method.

This will serve to reorient the thinking and the perspective of the group with respect to their present meeting and in relation to the entire sequence of topics for the course as a whole.

(The leader may, indeed, in this connection, profitably take a moment to look back over the total list of topics for the course with the group, as distributed at the first meeting.)

Introductory Comment (continued)

It will be recalled that the importance of such periodic orientation and re-association, considered as a training device was stressed in Conference No. 2 on the Preparation of the Training Conference.

The leader will then be ready to proceed with his conference proper.

Discussion Plan:

The leader may proceed directly into a full, close discussion on the learning process, particularly as it relates to the conference situation, by eliciting ideas from the group on the subject. ("What is the learning process?" "What do we mean by it?" "How do we 'learn', and what does knowledge consist of?", etc.) The leader should take care, in all this, however, not to allow himself or his group to go too far, or to get bogged down in a quasi philosophical or psychological controversy on these questions. He should 'allow' considerable freedom and wealth of expression, but he should judiciously keep the treatment well in control and lead it finally to a simple statement of a few valid basic concepts or ideas as to the realities of the learning process and as to the methods to be used in connection with it in the conference situation, and emerge with a development along the lines of Chart I - The Learning Process and Related Methods in the Training Conference.

He may then proceed in a similar fashion to a group consideration of how the leader can best motivate the members of his group, to secure their contributions and enliven their participation in the conference, and survey the related psychological factors. He may demonstrate motivation directly in his own present approach to the present discussion on this subject, and, after he has secured considerable response, he may pause and go back and analyze how he did it on the ground, here, just now. Perhaps he will have himself just done this by an appeal to individuals, directly, personally, even by name, with reference to the leader's knowledge of their experience, work or job connections. (It should be emphasized here that the leader will have taken care to become acquainted with the individuals composing his group, as early as possible, in tenure of their jobs, experience, and associations.) Or he may have cited a successful case of motivation from his own experience. Or he may have asked a series of leading questions. ("What can the leader appeal to in motivating participation?" "What are the psychological factors in motivation?" The group experience as a whole; the individuals; their individual experience; their talkitiveness; their pride; other

Discussion Plan (continued)

psychological factors - their normal self-consciousness and egotism; their reason; their connections, "How can he make these appeals"? By asking specific or leading questions; making statements - sometimes, with care, even wrong ones, deliberately - "Is that right?" - by citing examples or cases, by throwing points or questions back to the group, getting the group to work upon itself, etc.)

By means of this direct and involuted approach, the leader should be able to control and secure an adequate development of Chart II - Motivation and Related Psychological Factors.

Similarly, once these patterns have been accomplished, the leader will be able to proceed with a discussion on the primary subject of interest, and have the group develop Chart III, Interest, and Chart IV, Some Interest, Situations, Causes, and Operating Tactics. ("How is interest secured?" "Why not important?" "How would you define it?" "How can we generate it?" etc. etc. "Suppose the group is not interested? What then?" etc.)

The leader will now be ready to direct the group to an adequate realization of the importance of the conference group itself to the training leader, to an understanding of the desirability of the leaders gaining skill in manipulating the group, in playing upon and with it, and in using and legitimately exploiting its presence and possibilities, in enhancing the conference process. ("What things in the group can the leader use in enhancing, directing, and controlling discussion?" Appeal to professional interests, to friendly rivalries, to similar or to diverse experience backgrounds, to legitimate controversial tendencies, to special information, etc. "How can he play upon the group, and use it to carry discussion forward?" By throwing questions or statements back to the group, in general, to have it "worry" them; to refer questions back to particular individuals, to lead from one individual to another, or through a selective circle of individuals, etc.)

By this means, Chart V, The Group and Its Use, can be formulated.

The leader may then have his conference survey the subject of Attention, in a pattern similar to that executed for the foregoing subject of Interest, and develop Chart VI on this subject.

He may then have a brief and not necessarily fully charted survey as to how attention can be converted into interest. (Statements, questions, writing on blackboard, exposing charts, passing out materials, making leading remarks, etc.); and he may then sum up his conference by stressing the

Discussion Plan (continued)

importance of the leader becoming himself aware and fully conscious of these devices, and factors, and possibilities, and assiduously practicing them, to develop and control his skill in group leadership.

Conclusion of the Conference:

The leader may then issue his chart summaries and supplementary materials and allude to the next Conference No. 5 on Discussion Techniques, as a continuation of the present material, and so conclude his meeting.

CHART SUMMARIES

Conference No. 4

Conference Leaders Training Course

Chart I

The Learning Process and Related Methods in the Conference Situation

What is "learning"?

The association of ideas

The assimilation of facts

The integration of experience

Learning is accomplished by all of these

The conference leader and the conference group are concerned with these things.

Does the conference situation enhance these things?

Transition from "what we know" to "what we don't know".

Process should be:

orderly

logical

clear

Five conference methods:

Explanation - (telling)

Demonstration - (showing)

Illustration - (picturing)

Experience - (doing)

Discussion - (reasoning)

CHART II

Motivation and Related Psychological Factors

A definition:

The stimulation of active interest in (some study or subject) through appeal to associated interests or by special devices.

Factors which can be appealed to:

The group experience as a whole
Special experience of individuals
Particular types of individuals
Talkativeness
Normal pride
Normal self-consciousness
Normal egotism (self-esteem)
Desire to dominate
Suggestibility
Humor
Reason
Convictions
Group feelings, values and approvals

Must the leader learn to know his group?

CHART III

Interest

Attention attracted and emotions engaged - interest

Order of interest development -

 1 2 3
Attention Curiosity Interest
(Motivation is based on these)

Value of interest -

Learning without interest dull and slow, if not
practically nil.

Interest is the "motive power" to keep "mental machinery"
in "motion".

CHART IV

Some Interest Situations, Causes, Tactics and Devices

<u>Situation</u>	<u>Cause</u>	<u>Tactic</u>
Members of the group do not respond to the leaders questions with enthusiasm.	Subject has no appeal. Group experience too little for discussion. Group fail to appreciate its value.	Change the subject 1. Present information in a new way to make more clear. 2. Use illustrations.
Discussion peters out within the group.	Subject is talked out.	1. Summarize the points and introduce a new subject.

Devices

Tactfully withhold information to arouse curiosity.
Recount interesting stories interestingly.
Appeal to all psychological factors of motivation.

CHART V

The Group and Its Use

The group as an entity is most important. It should be used constantly and constructively exploited for its own good, by the leader.

Appeal to:

Professional interest and authority
Position and authority
Friendly rivalries
Similar experience backgrounds
Diverse experience backgrounds
Legitimate controversial tendencies
Special Information

Be conscious of the group as a group
Never forget the group
Use the group
Help it to help itself
Keep its interest uppermost

CHART VI

Attention and Attention Getting Devices

Attention must be converted into interest.

A definition:

Direction or application of the mind to any object of sense or thought.

Devices - to be used judiciously for the control of the attention of the group.

1. If standing before the group - Sit Down
2. If sitting before the group - Stand Up
3. Write a statement incorrectly on blackboard
4. Clean off blackboard (without permission)
5. Arrange reference papers on desk
6. Raise the voice
7. Ask for correct time

AGENDA

Conference No. 4

Introduction to Techniques

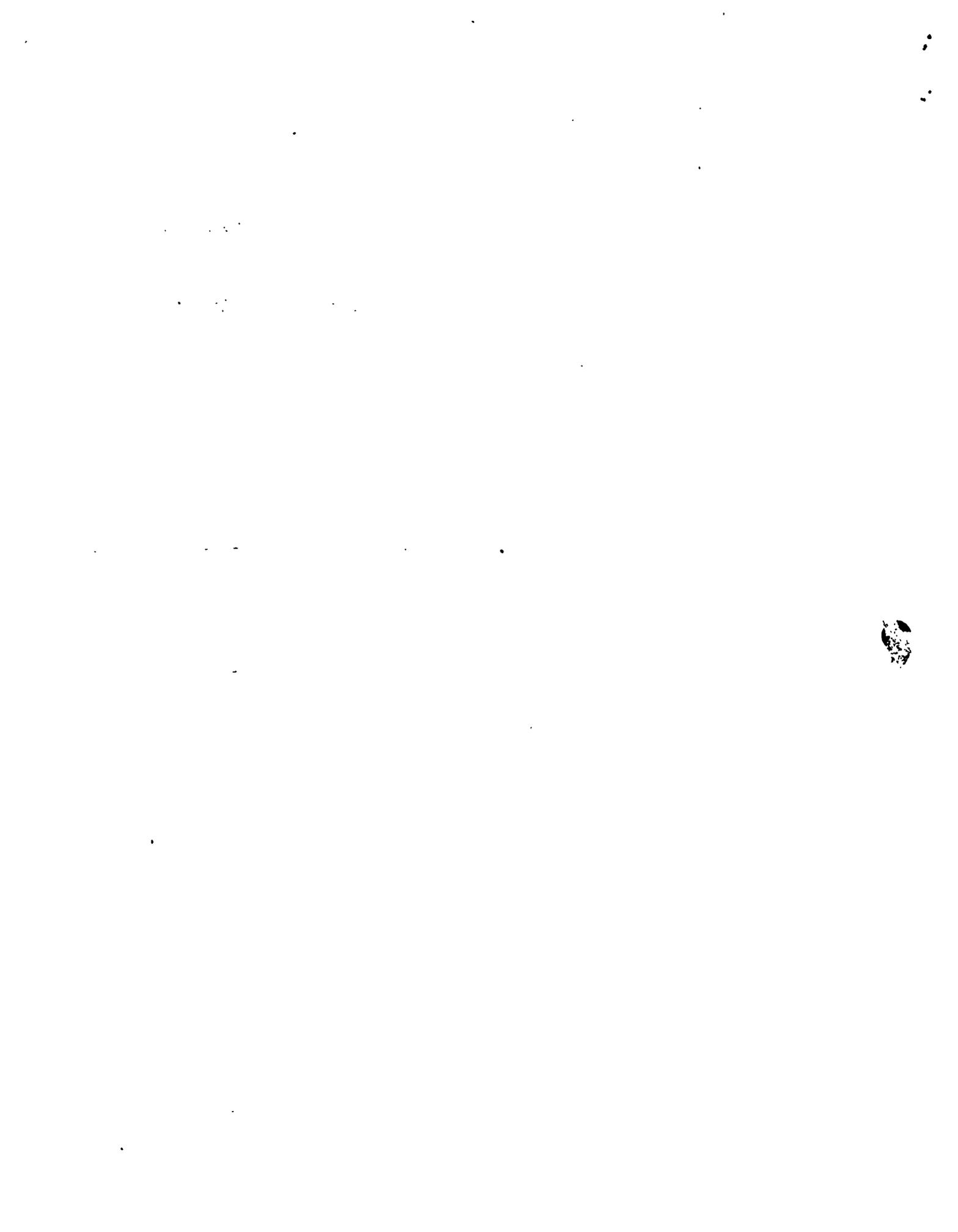
Principles of Learning in the Conference Situation

Conference Objective:

To gain an understanding of the processes of learning in the conference situation, and to learn the proper methods to use in prosecuting training conferences.

Purpose of the Conference:

1. To survey the learning process and related methods in the conference situation.
2. To study motivation and related psychological factors.
3. To study and define interest, and devices for generating it.
4. To survey the proper use and exploitation of the group, and to stress the importance of using the group.
5. To study and define attention, and devices for securing it.
6. To assay the role of the leader and his awareness in these connections.



Supplementary Materials

Conference No. 4 - Introduction to Techniques.

Principles of Learning in the Conference Situation

The learning process.

Possible methods in conducting conferences.

(1-Explanation - telling; 2- Demonstration - showing;
3-Illustration - picturing; 4- Experience - doing;
5-Discussion - reasoning)

The problem of motivation.

The psychological elements - their value, use and adaptation.

The fundamental importance of interest.

What it involves.

The order in which it is secured - attention - curiosity - interest.

Its value.

A definition.

Some devices for generating interest.

Interest situations, causes, and operating tactics

The group; its proper use and exploitation.

Attention.

Devices for securing attention.

Its conversion into interest.

The awareness of the leader.

Chart summaries
Supplementary materials
Agenda) for issuance on Conference No. 4

1. The first part of the document is a list of names.

2. The second part is a list of dates.

3. The third part is a list of names and dates.

4. The fourth part is a list of names and dates.

5. The fifth part is a list of names and dates.

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Conference Leaders Training Course
Washington, D. C.

Bulletin No. 47

Conference No. 5

Discussion Techniques

Training and Employee Relations Section
Personnel Division
Administration Branch

Conference No. 5

Discussion Techniques

Conference Objective:

To gain an understanding of the best techniques to be used in controlling and directing training conferences.

Purpose of the Conference:

1. To review the duties and attitudes of the conference leader.
2. To study the nature and types of training groups
3. To learn how to recognize and properly handle the various types of conferees.
4. To survey specific discussion devices.

Introductory Comment:

It may be well for the leader to begin this meeting by emphasizing again the fact that the group is now considering specific devices intended to be used in action by the prospective leaders in their training conferences; and he may wish to take a little time to draw out from the group the major subjects touched upon in the preceding Conference No. 4, Introduction to Techniques. He should then review rather specifically the duties of the leader and the attitudes of the leader as surveyed previously in Conference No. 2, Charts Nos. 3 and 4. He may wish to expose the wall charts on these subjects previously used, and point out in this connection that the next Conference, No. 6, will be devoted to a full and detailed consideration of the role of the conference leader.

Then, after having surveyed with the group the agenda for the present meeting, he may proceed with his discussion proper for the present meeting.

Discussion Plan:

By asking such direct questions as "What are some of the types of personalities, characters or individuals the leader is likely to meet in a mixed group of approximately 20 to 25 people?", or "In what ways are individuals most likely to express their characteristics in a conference situation?", the leader may proceed directly into a full discussion on the types of conferees, and their recognition

Discussion Plan (Continued)

and handling, and so develop Chart No. 1 on this subject. This important topic can be gone into as thoroughly as need be and should not be neglected in the interest of proceeding too rapidly to other subjects in the conference. (The leader will find in the long run that his knowledge and recognition of individual personalities and his deftness with respect to handling them will form one of his most powerful attributes as a good conference leader.)

Some consideration should be given to a discussion of possible resistance in training groups and the means whereby the conference leader can express his resourcefulness by initiating contribution and discussion, appealing to curiosity, and translating it into interest, with a brief word as to what to do if a conference stalls; and so develop Chart 2 on the subject.

Then the completest possible summary analysis and contribution on how to start discussion, how to keep it going, how to direct it toward the objective and purposes of the conference and how satisfactorily to terminate it, should be undertaken, to develop a complete chart on this subject (Chart No. 3). In this connection, the leader may present a series of conference situations (such as those suggested in the chart) and ask the group to tell what tactics they would employ to resolve the situation satisfactorily. This process should afford the conference leader an opportunity to permit the group to do a great deal of pro and con discussion, both among its own members and as between it and himself.

The leader will then be ready to develop a summary chart on Discussion Devices, Chart No. 4. He should then take a moment by way of reviewing the comprehension of the group as a whole to date, to ascertain the extent to which the group has gained an understanding of conference methods, situations and devices in the Conference Leaders course. He should ask such questions as, "Are you beginning to recognize that a training conference is a special situation with a definite method of its own differing from the other methods of teaching and imparting information which we charted earlier in the course?", "Do you see the central problem of control and discussion and the situations which may be met and the devices to be used?", "Do you now realize the central importance of the leader's role and the desirability of skill and practice on his part?"

Conclusion of the Conference:

The leader may then point out that the next meeting will be devoted entirely to the discussion of the conference leaders qualifications and role; and after having passed out his chart summaries and supplementary materials, he will stand ready to dismiss his group.

CHART SUMMARIES

Conference No. 5

Conference Leaders Training Course

Chart I

Types of Conferees

The average conference group will contain as many different personalities as there are individuals. The following examples are intended to aid the leader in recognizing the various types and to apply the most effective operating tactic.

<u>TYPES</u>	<u>HOW TO RECOGNIZE</u>	<u>OPERATING TACTICS</u>
Aggressive	Forces opinions on others	Call on a likely member to check mate.
Disinterested	Restless - appears bored	Try to find his interests and play up to them.
Timid	Pay close attention to discussion	Encourage expression of opinion.
Slow to arrive at conclusions	Offers contribution after conclusions have been reached	Be extra patient and make his contribution worth while.
Mentally Alert	Invariably has right answer to any question	Call for his contribution when group thinking needs clarifying.
Narrow Minded	Sticks to his own point of view. Usually governed by emotion rather than reason.	Appeal to sense of pride to accept new view points.
Good Listener	There to listen - Not to talk	Diplomatically emphasize the value of everybody participating in discussion.
Worrying Type	Insists upon injecting his personal problems into discussion	Ask group to work out his particular problem.
Self-satisfied (Does not see why others should benefit by his experience)	Exhibits Self Appraisal by egotistical statements	Play up to his egotism and persuade him the group is anxious to hear of his experiences.

Chart II

Means for Initiating Discussion

Essentials

Set up the problem interestingly
Express it vividly
State a case when possible, to
 illustrate its importance
Stimulate interest by any legitimate means

General Ways for Keeping Discussion Moving

1. Cases by the leader. Before a leader goes to a meeting he should be well prepared with concrete examples pertaining to all points he has scheduled for discussion. When discussion lags he can stimulate it by presenting some of these.
2. Stories by the leader - with a humorous turn. The leader can soften a resistant group and get them into a cooperative mood by telling a humorous story, preferably related to the problem as presented.
3. Cases by members of the group. Whenever possible members of the conference should be called upon to cite examples of the point under discussion.
4. Leading questions by the leader. Thinking is never stimulated by merely telling men something even about a matter in which they "think" they are interested. Discussion can be best stimulated through the use of questions which require thought before they can be answered.
5. Direct statements by the leader. It is frequently valuable for the leader to make a direct statement, often contrary to accepted opinion of the group, to provoke discussion.

Chart IIIDiscussion Techniques

Below are a number of situations which may occur in any conference group.

STARTING DISCUSSION

<u>Possible Group Situations</u>	<u>How to Recognize</u>	<u>Operating Tactics</u>
Everybody waits for the other member to start.	Conferees lack confidence in their ability to start ball rolling.	Give the Group a small bit of the topic to give direction to their thinking.
The group think they do not know anything about the subject when they really do and hesitate to start in.	Replies to leader are brief and to the point. Answers are mostly yes or no.	Call for experience which will illustrate the point.

KEEPING DISCUSSION GOING

s a result of somebody having "made a break" discussion has been killed.	A few partly suppressed smiles may be in evidence.	<ol style="list-style-type: none"> 1. Ignore it or cover it up with a funny story. 2. Misinterpret the thing which caused the break.
Group is suspicious and hesitate to express opinions for fear of being shown up by group or leader.	Several members whispering to each other. An undercover remark may indicate the situation.	<ol style="list-style-type: none"> 1. Encourage them directing. 2. Make a special point of giving them credit for what they say and 3. Develop their statements.
Hesitation for fear of reflecting on some other group member.	Remarks dropped might indicate the trouble. Talkative members become quiet.	Make a statement as to the impersonal character of all

Chart III (continued)

CONTROLLING DISCUSSION

Points are coming too fast

1. Slow down discussion
2. Have a member take down contributions

Local discussions are taking place in which the group as a whole do not share

1. Pay a compliment to the interesting nature of the discussions.

Leader is unable to break away from one discussion to set down contributions from other members.

1. Ask members to hold their contribution for a moment.
2. Jot down a few words to recall the comment.

TERMINATING DISCUSSION

1. Stop discussion as soon as the objectives have been reached.
2. Summarize all discussions (This will often furnish a means of terminating discussions.)
3. Make sure that all points under discussion have received full consideration in making the summary.
4. Summarizations should in general be - short - sharp - and - snappy.

Chart IVDiscussion Devices

Interesting statement of the problem
 Indirect questions
 Direct questions
 Appeal to individuals
 Appeal to the group as a whole
 Cite Cases
 Tell stories
 Have group cite cases
 Make statements which may be challenged
 Ask leading questions
 Feed to the group a small bit of the topic to give
 direction
 Call for experience from the group
 Cover over any breaks and move forward rapidly
 Develop statements made
 Indicate recognition and credit for contributions
 whenever possible
 Take over from the group directly and firmly but
 courteously and move forward to new phase or
 direction of discussion whenever necessary
 Break up local discussions by request for sharing point
 with the whole group
 Throw questions and statements from the group back to
 the group
 Support statements of hesitant or backward members
 Encourage individual contribution by interest and
 recognition
 Use attention-giving devices
 Exhibit vitality and alertness without dominance
 Practice all proper attitudes of the conference leader
 Gain the group's confidence in every way possible
 Show your respect for and confidence in the group by
 deference to it without loss of control
 Gain its respect by firm control and an impression
 of self-confidence

Agenda

Conference Objective:

To gain an understanding of the best techniques to be used in controlling and directing training conferences.

Purpose of the Conference:

1. To review the duties and attitudes of the conference leader.
2. To study the nature and types of training groups.
3. To learn how to recognize and properly handle the various types of conferees.
4. To survey specific discussion devices.

Supplementary Materials

Conference Leaders Training Course

Outline of Topics

Conference No. 5

Discussion Techniques

Review of duties of the leader.
Review of attitudes of the leader.
The nature and types of groups.
The types of conferees recognition and handling.
Resistances and initiative and interest.
The resourcefulness of the conference leader.
Starting and stalling.
Discussion - starting it; keeping it going;
controlling it; terminating it.
Situations and Tactics.
Review of discussion devices.
Statements. Questions, Facts. Examples or
stories. Charting. Exploitation of the group.
Handling of individuals.
Summary of discussions.
Chart Summaries)
Supplementary materials) for issuance on Conference No. 5
Agenda)

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Bulletin No. 47

Conference Leaders Training Course
Washington, D. C.

Conference No. 6

The Conference Leader

Training and Employee Relations Section
Personnel Division
Administrative Branch

Conference No. 6

The Conference Leader

Conference Objective:

To gain an understanding of "the conference leader".

Purpose of the Conference:

1. To survey the responsibilities of the conference leader, and define conference leadership.
2. To study the qualifications of the conference leader.
3. To survey the things he must do, and those he must avoid doing.
4. To study the conference leader's ethical code, and situations involving it.
5. To survey standards for the selection of conference leaders, and plans for their self-criticism and self-development.

Introductory Comment:

The leader may open this meeting by suggesting to the group that the foregoing informatory and preparatory conferences Nos. 1 through 3, and the preceding conferences placing emphasis upon the active conference situation, Nos. 4 and 5, may now, in a sense, all be summarized together in the topic of the present conference No. 6 on The Conference Leader. He should emphasize again, or elicit from the group, a statement pointing up the fact that the group itself, and the bearing of the leader upon it, comprise the two major elements in the conference picture (seconded in importance only by the desirability of advance preparation on the conference leader's part). Hence, the responsibilities, qualifications, activities and obligations of the conference leader with respect to the group, will all mirror and synthesize the concept of the conference method of training.

The leader should stress that the "conference leader" may be studied as a typical, or representative, entity, or **concept**.

Discussion Plan:

The leader may begin directly by asking the group to make contributions of their ideas on the responsibilities of the

Discussion Plan (continued)

conference leader. As complete a charting as possible should be made under this heading. ("To whom is conference leader responsible?" "What is the nature of his responsibility?" etc.). In this way, Chart 1 can be directly and fully developed on this subject.

The leader should then endeavor to develop a statement covering the "concept of conference leadership" (the leader, is, with respect to the group, a relatively passive, yet at the same time a stimulating, directing and controlling influence;) the group should formulate a definition, and so chart briefly Chart No. 2 on the Concept of Conference Leadership.

The leader should then plunge with the group into a full consideration of the qualifications needed by a good conference leader and he should stress the importance of what is called 'personality' in this connection.

The leader may, himself, say a few words or get from the group a few ideas as to the conference leader's role and influence as a Personnel Officer, but he need not chart anything in particular on this phase.

Then by asking "What must the leader do to insure a successful conference?", Chart 3 on Things the Leader Must Do, may be elicited readily.

The leader may then ask the opposite question, "What are the things the leader must be sure to avoid doing?" and so develop Chart 4 on the Things the Leader Must not Do.

The leader may then summarize the cardinal attributes necessarily (paralleling the points previously made respecting the conference leader's attitude), for the group, without necessarily charting these on the board.

Then, by asking such questions as "Has the leader any special obligations with respect to the group?", "Is he, in a sense, morally responsible for it?", and "What do you think might constitute the elements of a conference leader's ethical code?", the leader may draw the group into the development of Chart 5, the Conference Leader's Ethical Code.

He may then proceed directly into a survey of typical situations involving use of the ethical code and so develop Chart 6 on this subject. (He may mention one of these situations himself, and get others from the group, if he wishes.)

Discussion Plan (continued)

The leader should then turn to a consideration of the qualifications necessary for a conference leader. He may ask "What attributes of personality, character and intelligence should a conference leader have?" He should have no difficulty in developing this topic readily with the group in Chart 7 on this subject.

He may then ask the group for contributions as to their ideas on standards for the selection of conference leaders in organizations, and so build up Chart 8 on this subject.

The leader should then stress the importance of self-criticism and self-appraisal on the conference leader's part, with respect to his success in handling conferences, and the importance of concern for his self-development in his role or job of conference leading.

The leader may then present to the group examples of self-criticism and self-development leadership charts, run over them with the group, and stress the importance of actually using them (Chart 9).

Conclusion of the Conference:

The leader may then draw his conference to a conclusion by pointing up what the ideal situation is, and by emphasizing the three basic things which must, without fail, be done by the leader in order to work out a pattern as closely approximating the ideal as possible. (Chart 10, Summary: Essential Things: The Ideal)

Before dismissing his group, the leader should stress the next conference will be a practice conference devoted entirely to the preparation of a conference leader's outline by each member of the group in the conference room. The leader should pass out, and run over briefly, a list of suggested topics for possible choice by the conferees, as subjects on which to prepare an outline, and possibly give a practice conference in subsequent meetings.

Then, having distributed his chart summaries and supplementary materials, the leader will stand ready to dismiss his group.

CHART SUMMARIES

Conference No. 6

Conference Leaders Training Course

Chart I

Responsibilities of the Conference Leader

- Assembling material for training topic from authoritative sources.
- Studying and arranging material for treatment in conference outline form.
- Writing up conference outlines on the topics of training programs.
- Scheduling, or assisting in the scheduling, of training groups.
- Prosecution of training programs, courses and topics of conferences in accordance with the conference method of training.
- Maintenance of records of training groups.
- Keeping materials of conference topics (as formulated in conference outlines) up-to-date and accurate.
- Self-development and self-appraisal as a conference leader.
- Preparation of reports on training activities and conferences.
- Maintenance of skill as a conference leader by practice or by attendance at conference leader's training courses and in-service training meetings.
- Follow-up of training activities after completion of program and by visitation to other training meetings whenever possible.
- Maintenance of continuing friendly rapport with trainees, in-so-far as possible.
- Keeping himself informed as a leader.

The conference leader is responsible to

- a. His training group or conference.
- b. His own supervisor.
- c. The organization of which he is a part.
- d. His colleagues and co-workers in the training field.

Chart II

The Concept of Conference Leadership

With respect to the group, the leader's role is:

Passive (relatively), yet
Stimulating
Directing
Controlling

The leadership is a constructive and helpful influence, not a commanding dominance.

Definition:

Conference leadership is the stimulation of discussion on a definite subject and the direction and control of the discussion toward the achievement of a specific objective or purpose.

Chart III

Things the Leader Must Do.
(in the Conference Situation)

- Prepare each conference thoroughly.
- Engender discussion and contribution.
- Control discussion direct toward the objective.
- See that all individuals participate, in-so-far as possible.
- Keep the group's interest uppermost.
- Exemplify confidence.
- Be considerate of, yet firm with, individuals.
- Use all legitimate devices to foster the group's interest.
- Be alert and good humored.
- Do effective charting.
- Summarize.
- Transition.
- Use wall charts and other supplementary aids, as deemed most desirable.
- Provide for adequate substance-content in all conferences.
- Make advance and retrospective allusions to other subjects and materials.
- Orient trainees with regard to a proper perspective on training.
- Elicit, record and forward valuable suggestions.
- Treat all members of the group alike.
- Terminate discussions appropriately.
- Recognize and acknowledge contributions.
- Exemplify loyalty to the organization and its officers.

Chart IV

Things the Leader Must Not Do

Express his own opinions except very rarely and for special purposes

Avoid using such expressions as

"You ought to do";

"Don't you think";

"I think";

"I want you to";

"In my opinion".

Argue

Use sarcasm or ridicule.

Be too abrupt or discourteous.

Talk too much himself.

Talk too loud.

Quibble.

Write long sentences (in charting).

Treat too much of abstractions.

Interrupt others.

Indulge in obtrusive mannerisms of gesture or movement.

Lose his temper.

Become involved or excited.

Be too heavy and serious.

Allow the meeting to run too much over time.

Pass out material without some reference or explanatory word concerning it.

Come late.

Mention or talk about personalities.

Refer to himself.

Use the expression "I".

Give out confidential information.

Introduce or permit discussion on controversial topics.

Introduce or permit discussion on dangerous subjects outside the conference topic.

Give orders to the group.

Chart V

The Leaders Ethical Code

Ethics are generally accepted as being the basic principles of right action or the science of human duty; moral science. The leaders ethical code may be defined as a set of general principles which the leader falls back upon in deciding how to deal with situation affecting the right of others and his own responsibilities.

RULES OF ACTION

1. Under no circumstances violate confidence.
 - A. In own organization
 - B. With other organizations.
2. Be open minded about other peoples jobs and their opinions.
3. Dissociate any ability that you may have as an expert from your job as conference leader.
4. When credit should be given to someone else, see that he gets it.

Chart VI

Typical Situations Involving Use of the Ethical Code

SITUATIONS	OPERATING TACTICS
Group members request privileged information.	Emphasize the confidential nature of the information on a golden rule basis.
The leader is asked to give his opinion as to courses given by outside institutions.	Avoid committing himself. Refer them to authorities on the subject.
Undersirable conditions are uncovered in connection with the conference work. Should the leader bring it to the attention of the management or side track it?	The leader has a responsibility to the management and to the group. Analyze the situation and take action. Action should be governed by his judgment of right action.

In the long run, any conference leader who stands squarely on the ethical code will be better off than one who does not.

Chart VII

Conference Leaders Qualifications

- A. The leaders should have:
1. A knowledge of the subject to be discussed.
 2. An understanding of teaching technique.
 3. A considerable degree of intelligence.
 4. Ability to think in concrete terms rather than in abstractions.
 5. Considerable breadth and depth to his thinking processes.
 6. Leadership ability.
- B. The leader should be:
1. Able to make good impressions on first contacts.
 2. Able to take part in an argument if necessary without giving offense.
 3. Able to exercise patience to a marked degree.
 4. Consistent in all relationships.
 5. Able to improve the attitudes and thinking processes of others.
 6. A high grade individual.

SUMMARY: The personality of the leader is without question the most important single factor which contributes to the success of the conference. By closely observing his own technique and the reactions that it creates in others, he will be able to sense what steps should be taken for improvement. The qualities that go to make up a desirable and effective personality for the job of conference leading can be developed only by the leader himself.

Chart VIII

General Standards for the Selection of Conference Leaders

In all cases of selection of employees for training as Conference Leaders, emphasis should be placed upon the experience and qualities of personality outlined below. The central importance of the Conference Leaders position in successful training requires that particular attention be paid to these things.

A. Standards in Relation to the Organization

1. Length of service in the organization

It is assumed that the longer a man has served successfully in the organization, the better his own adaptations to its conditions, problems and exigencies will be, the greater his knowledge of its work, and the sounder his ability to interpret the organization and instruct others in its requirements. Other things being equal, the prospective Conference Leader should have been employed in the organization at least one year.

2. Experience in the organization

A prospective Conference Leader should have a wide background in fairly responsible positions within the organization. He should have a wealth and variety of experience in the agency.

3. A progressive record in the organization

A man who is to lead conference should have first demonstrated his own efficiency in terms of his own progress in work and responsibilities in the organization.

4. A successful practice executive

A Conference Leader in the organization must have a definite practical outlook on the problems considered in training. He must be able to deal in concrete things and must not be too much concerned with abstractions.

B. Conference Experience

Considerable practice in handling conferences with office staffs or field staffs on procedural and operational matters will form an important part of the equipment of a Conference Leader.

Chart VIII (continued)

C. Personal Qualities

1. Alertness, Vitality and Adaptability

Reasonable energy and drive and the ability to think quickly and to adapt his personal reactions and expression to various conditions is desirable in the Conference Leader.

2. Ability to get along with people.

A Conference Leader should be likable, should be able to win the confidence of the people he deals with, and should be able to influence them constructively.

3. Natural ability as a trainer

A prospective Conference Leader should have demonstrated his capacity to train fellow employees by his success in developing the people who have worked under him through training in their specific jobs and in their general office situations.

D. Education

The prospective Conference Leader should preferably be a graduate of a recognized college.

E. General Experience

1. Teaching experience

Teaching experience is desirable though not essential. Where indicated, at least two years of it would be preferable.

2. Business experience.

Successful experience in private business or private industry, particularly with reference to qualities of leadership shown in the experience, will be a valuable background for a Conference Leader.

3. Agency experience

Successful experience in a supervisory capacity in management work in other Federal agencies will be a good qualifying criterion for the prospective Conference Leader.

Chart IX

Self-Rating Chart for Conference Leaders

Date _____

		RATING			
		Poor	Fair	Good	Excl.
1.	How well was the discussion distributed? Did most of the group members participate?				
2.	Did I avoid confusion in thinking by stating the problem clearly and by-re-stating, crystallizing, and organizing the points in the discussion? Did I seem to know where I was going?				
3.	To what extent did I hold the discussion to the main topic by preventing side-tracking and by getting it back after side-tracking?				
4.	How well did I let the group do its own thinking without dominating the situation, talking too much, or constantly forcing my own ideas?				
5.	How well did I accelerate the discussion by returning questions to the group, asking overhead and direct questions, citing cases or otherwise sustaining interest in a resourceful manner?				
6.	How successfully did I deal with individuals when faced with difficult situations - efforts to monopolize the floor, offensive argument, or the introduction of dangerous topics?				
7.	How well were off-side or private conversations controlled and everyone's attention centered on the points made to the group as a whole?				
8.	Was the blackboard work clear, neat, and fast? Did it clarify the thinking? Did I list all the essential facts?				
9.	Did I maintain a friendly, easy-going, and helpful manner which commanded the confidence and respect of the group?				
10.	Did the discussion cover as much ground as possible in the time available, in a thorough-going manner so that the group really absorbed it?				

Chart X

Summary: Essential Things: The Ideal

The objective is that state of mind, attention and/or knowledge which the leader wants the group to develop through the exchange of ideas.

STEPS TAKEN BY THE LEADERS IN SETTING UP THE OBJECTIVE

1. Determine what ideas he wants the group to have at the end of the discussion.
2. Think out the particular questions he will ask and the specific statements that he will make in reaching the objective.
3. Determine the logical sequence of the material contained in the outline the leader intends to use.

The ideal situation is where the discussion is controlled by the leader in such a manner that the group is not aware of being lead and where the reaching of the objective seems to be the natural results of the discussion.

AGENDA

Conference No. 6

The Conference Leader

Conference Objective:

To gain an understanding of "the conference leader".

Purpose of the Conference:

1. To survey the responsibilities of the conference leader, and define conference leadership.
2. To study the qualifications of the conference leader.
3. To survey the things he must do, and those he must avoid doing.
4. To study the conference leader's ethical code, and situations involving it.
5. To survey standards for the selection of conference leaders, and plans for their self-criticism and self-development.

Suggested List of Topics

For the preparation of a conference
leaders outline and for demonstration
conferences

1. Responsibilities of the supervisor (general).
2. Development of understudies.
3. Care of materials and equipment.
4. Maintaining discipline.
5. The supervisor as an instructor.
6. Regulations affecting FPMA employment.
7. Safety and accident prevention.
8. Compensation.
9. Employer-employee relations.
10. Giving orders.
11. Records and reports.
12. Planning.
13. Office management.
14. The dissatisfied employee.
15. Putting the right worker on the right job.
16. Public relations.
17. History, aims and purposes of the FPMA.
18. Office manners.
19. The supervisor and the new employee.
20. Job analysis.
21. Office procedures.
22. Leadership.
23. Policy relating to office functions.
24. Organizational relationships.
25. Functional relationships.
26. Training.
27. Special responsibilities of supervisors (with regard to timekeeping, leave, travel, and related subjects).
28. Responsibility for property.
29. The broader aspects of the supervisor's job.
30. Rating employees.

Supplementary Materials

Conference No. 6 - The Conference Leader

The responsibilities of the conference leader.
To whom responsible. Nature of responsibilities.
The concept of conference leadership.
A definition.
The conference leaders qualifications.
The importance of what is called personality.
His influence and role as a personnel officer.
Summary of the things he must do.
Summary of the things he must avoid doing.
Summary of cardinal attributes.
The conference leaders ethical code.
Principles of action.
Situations involving the application of the ethical code.
Standards for the selection of conference leaders in an organization.
The leaders self-development.
The leaders self-appraisal.
Some points for criticism.
Self-development leadership charts.
Some points on the leader in action.
The ideal situation.

Chart Summaries)
Agenda)
Supplementary materials) for issuance on
Suggested list of conference topics) Conference No. 6

Announcement of practice meeting--Conference No. 7

Conference No. 7

Practice Conference on the Preparation
of the Conference Leaders Outline

Equipment Needed:

Large legal pad
Two writing pencils with erasers
List of suggested conference topics
Model of the conference leaders outline on "The Preparation
of the Conference Leaders Outline" (provided in Conference
No. 2 of the Conference Leaders Training Course.)

Exercise:

Choose a topic on the suggested list.
Write a complete conference leaders outline on it.
Follow the pattern of the model.
Include all the components of a typical conference leaders
outline.
Prepare chart summaries.

Aid:

Ask questions of the conference leader at any time, for
assistance in determining the content and the pattern
of the exercise.

Time:

1½ hours.

Conference No. 8

Practice Conference Leading

Group members are urged to participate in the demonstration conference as constructively and helpfully as possible in order to enhance the confidence of the demonstrator, and to assist in an adequate discussion which will provide opportunity to the demonstrator to use as many devices as possible and move forward vitally with the conference toward his objectives.

At the same time, for their own interest in the demonstrations, they should bear in mind the following points by way of constructive criticism of the conduct of the leaders.

Opportunity will be provided for discussion of the demonstration along the lines of these ten questions.

Points for Criticism:

1. Did the Leader clearly define the thoughts he wishes to convey to the Group?
2. Were the questions well distributed:
3. Did the leader offer any opinions of his own?
4. Was the objective within the understanding of the group?
5. Was the leader at ease?
6. Did he do anything to annoy the group?
7. How was the interest - high or low?
8. Were the ideas developed or did the leader inform?
9. Did he succeed in getting the group to discuss amongst themselves?
10. Did the leader attain his objective?

Conference No. 9

Practice Conference Leading

A Note on Periodic Self-Appraisal for the Conference Leader

It will be recalled that in connection with Conference No. 6, the concluding conference of the regular series in the Conference Leaders Training Course, on the subject of a Conference Leader, a self-rating chart for conference leaders was provided (Chart No. 9, Chart Summaries, Conference No. 6).

Demonstrators at practice conferences should endeavor to rate themselves with respect to the success of their conference and their skill as leaders subsequent to their demonstration conference in accordance with the points of this chart.

Conferees observing a demonstration conference may use the same chart to gage the success of their colleagues in the demonstration; and they should use the chart for rating themselves whenever they have occasion to give their first few conferences, and from time to time thereafter over the course of their conference training work.

A periodic self-appraisal over the course of continuing conference work will be found advisable, along the lines of this chart or of others similar to it. Such self-examination will prevent the leader from becoming over-confident and too routinized in his conference practice and will save him from continuing in errors or developing habits which he may not be fully aware of, and which may be disclosed for correction by such a periodic check.

CONFERENCE NO. 10

Practice on Problem Situations

By pre-arrangement with the group, the leader may take one hour of the time of the last meeting for the setting up of four typical "conference situations", to demonstrate for the group their handling and resolution in terms of appropriate devices. With the cooperation of individual group members and the group as a whole, he may set up situations such as the four suggested below or any others he may choose to demonstrate:

(Note: In connection with each of the following situations, the group members should consider these questions:
What does the leader do?
Does he try more than one device?
What are the devices?
Which one is best?
With what success does the leader resolve the situation?)

1. A group member will play the role of a very talkative individual who insists upon monopolizing the discussions and contributions.
2. Another group member will play the role of an individual who apparently has a personal grievance or problem back in his own office and insists upon referring all points made in the conference back to his own problem, or talking about them from an obviously personal bias or pre-occupation.
3. Another group member will play the role of a shy and retiring individual, yet one who is apparently interested.
4. The group as a whole will act in unison as though the discussion had tapered off or run itself out and as though they were getting disinterested, restless and desultory.

The leader may take all these situations on himself and resolve them one after the other, allowing about fifteen minutes for each one; or he may take one or another of them and ask for one or more volunteers from the group to handle, by way of demonstration, those he does not himself undertake during the hour.

The remaining half hour of the normal time allowed for the tenth meeting may be occupied with the written quiz, which is also indicated for Conference No. 10.

SUGGESTIONS TO FACILITATE THE SUCCESSFUL DEMONSTRATION
AND RESOLUTION OF CONFERENCE PROBLEM SITUATIONS AS
OUTLINED FOR CONFERENCE NO. 10

Problem Situation No. 1 -- The Discussion Monopolizer.

Subject of hypothetical conference -- Planning.

Status of the conference on Planning -- charting is going forward on the following sub-topic: "What are some of the things which enter into planning?" (Such things as What? How? Who? Where? When?)

The next charting -- subject to move forward to -- "What are some of the results of poor planning?"

Suggested devices for swerving the situation away from the discussion monopolizer:

- a. The leader may ask a direct question of some other group member.
- b. The leader may direct a leading question to the group as a whole.
- c. The leader may take time to tell a story himself or to cite a complete case.
- d. The leader may have the group move on to the next chart subject on other phases of the conference.
- e. The leader may himself ignore the monopolizer and pass directly to the next topic taking the lead himself and then swing the group into it away from the monopolizer.

Problem Situation No. 2 -- The Personal Grievance Case.

(One who harps on or refers all discussion to an obviously personal problem).

Subject for this hypothetical conference -- Office Management.

Status of the conference -- discussion on "What are some of the things which characterize good management?" (Variation of the work for all employees. All have equal opportunity for changes in the work. Even load in work. Personal interest on the part of the supervisor in the progress of individual work).

Other topic of the conference to move on to - "In what ways can the supervisor show a personal interest in the employees working with him?"

Suggested devices for swerving the conference away from the grievance case:

- a. Ask the individual straight out to tell his grievance story and discuss it with the group and exhaust it as rapidly as possible once and for all and then leave it.
- b. Turn the case as he puts it, over to the others in the group and let them discuss and exhaust it as rapidly as possible.

- c. Take the initiative in moving on rapidly and carrying the group with you into the next topic; leaving the grievance individual alone for the remainder of that particular meeting.

Problem Situation No. 3 -- The Shy and Inhibited Group Member.
Subject for the hypothetical conference -- Employer-Employee Relations.

Status of the conference -- Charting and discussion on adjustment of individual problems of employees in relation to employer-employee relations. "What is the nature of the interest which the supervisor should take in the personal problems of the employees?" "What should he be prepared to do about them?" "How far should he go in connection with them?" "How can he ease tensions and offset their effects on the employee's work?" (Such things as occasional heart to heart talks; by referring individuals to authoritative sources, other agencies and other avenues of assistance; by showing in his attitude that he realizes the significance of the things which bother the employees -- being interested and sympathetic. On the other hand, avoid becoming involved himself. Be sure to point up the necessity for full work performance and cooperation with the office; gain this by showing some constructive interest and human brotherhood in connection with the problem, whatever it may be. Be firm, yet kindly. Do not lean too far toward catering to any weaknesses employees may show with respect to their own problems.)

Suggested devices for leading out the shy employee in connection with this subject:

- a. Ask him direct questions slowly and gently, with a sympathetic and interested bearing -- in order to draw him out.
- b. Have his immediate neighbor on either side ask him questions on subjects connected with the topic. (Did the supervisor show interest in you after you were on the job awhile?" "Were you left alone too long without any guidance or contact with your supervisor?" "Did he ever ask you to come in for a personal interview about your work or things in general?")
- c. Move on with the group, then ask a few direct questions again--play on the shy person for a little while.
- d. Stop the situation then as far as he is concerned, and move away from him in the group, letting him alone for the remainder of that period.
- e. Repeat this process at subsequent meetings on other topics until he shows signs of opening up and standing on his own feet.

Problem Situation No. 4 -- Group Interest is Low.

Subject of hypothetical conference -- Avoiding Idle Time.
(By good planning of work, by sufficient direct supervision, by avoidance of overstaffing, by equalization of load among employees, by proper timing of production schedules, by seeing to it that materials and supplies are on hand as needed.)

Status of the conference -- general charting and discussion on above points -- but the interest of the group has lagged.

Suggested devices:

- a. Tell a funny story to get the group in a good mood (like the one about the warning sign for hunters up in the Catskills in New York State discovered by the National Administrator of WPA on a field visit which the local warden proudly pointed out -- to the effect that, warning, be careful, don't shoot until it moves, it may be a WPA worker -- or any other similar type of story pointing out idle time).
- b. If the funny story doesn't work, tell a striking or dramatic or exciting story, such as a railroad crossing accident due to idleness on the part of a crossing watchman.
- c. The leader may move about a bit and go into the group and approach one of the members directly and come close up to him and stand directly over or along side of him and ask a direct question or two of the individual in that relationship. The group member will, as a matter of courtesy, be obliged to respond to the question. The leader may then do the same thing to two or three scattered members of the group until things are moving again and the group has become active. (This must be handled carefully and naturally and realistically, without letting the group members see that it is a deliberate device.)
- d. Change the subject altogether, if need be.
- e. Move on rapidly with the group to a new subject by asking a series of rapid fire direct questions, and getting up and moving about and raising the voice slightly, to throw more vitality and interest into the situation.

Conference No. 10

Written Quiz - The Conference Leaders Training Course

1. Name all the elements in the conference situation. Underline the three most important ones.
2. Write a comprehensive definition of the term "conference", from the point of view of conference training.
3. List in order the parts of a conference leaders outline and name any devices which the conference leader may employ. In which part of the outline would these devices be indicated?
4. Name five types of charts and prepare brief charts exemplifying any two of the five.
5. Name three things the conference leader must do, three he should avoid doing, and four of his major responsibilities.
6. Check the correct answers to the following points:

The leader may rub off the blackboard whenever he wishes. Yes_____No_____

The leader may tell an untruth or make a statement he knows to be false or mistaken. Yes_____No_____

The leader may say "Don't you think...?" Yes_____No_____

The leader should always change the wording of a contribution when he charts it on the board. Yes_____No_____

The leader should begin his conference by asking a direct question of some individual by name. Yes_____No_____

7. In the following problem situations check the devices best to follow:

Situation

Devices

- a. One group member monopolizes contribution.

The leader should tell a story.

The leader should cite a case.

The leader should ask a leading question of the group.

The leader should ask a direct question of an individual.

- b. Discussions have lagged and the group seems uninterested.

If sitting down, the leader should get up.
The leader should ask a direct question of an individual.
The leader should tell a case.
The leader should ask a group member to tell a case.
The leader should summarize points already made.

- c. Intra-group discussion very lively and argumentative and points are coming too fast.

The leader should summarize.
The leader should turn his back to the group and work on the board or become absorbed in his notes.
The leader should interrupt intra-group discussions or contributions being made.
The leader should have a group member address a point or cite a case to the group as a whole.

8. Name five qualities of the conference leader and five attributes needed for preparing good conference leader outlines.
9. What you understand by "a desirable perspective on training"? Why important? How helpful to the group? How achieved?
10. Describe the conference leader's ethical code. Name three situations which may involve it, and tell what conference leaders should do in each situation.