How to Lead a Successful Special Meeting: Types of Special Meetings
After completing this module, the prospective Special Meeting Chair & Planning Committee will be provided:

- An overview of the types of special meetings, and
- Suggestions specific to the type of special meeting
Sp Mtg Types: Agenda

- This module will cover
  - Overview
    - Types
    - Format
    - Plenary Speakers
  - Workshops
    - General Advice
    - Meeting Management
    - Working Groups
    - Special Considerations
  - Tutorials
  - Colloquium
Sp Mtg Types: Overview

- MORS has four types of special meetings
  - Workshops (see slides 8-25 in this module)
  - Mini-Symposium (see slides 26-31 in this module)
  - Tutorials (see slide 32 in this module)
  - Colloquia (see slide 33 in this module)

- The preparation for each type are similar
- The differences will be highlighted in this module and the following modules on
  - Team Responsibilities Module 4
  - Paperwork Module 5
  - Final Thoughts Module 6
Sp Mtg Types: Format Examples

• Example special meeting formats
  − Mini-symposium only: Homeland Defense, Spring 2001
  − Workshop only: Evolving the Practice of DoD Analysis, Winter 2000
  − Mini-Symposium and workshop: Capabilities Based Planning: The Road Ahead, Fall 2004 and Operations Analysis Support to Network Centric Operations, Winter 2004
  − Tutorials: New Techniques Workshop, Fall 2002 and Winter 2005
  − Colloquium: Education Colloquia, annually in the spring

• Their special meeting summaries and documents can be reviewed at:
  − Meeting Summary, a brief overview of the meeting (http://www.mors.org/Research/Special-Meeting-Summaries)
  − Meeting Documents, i.e., outbriefs, reports, etc. (http://www.mors.org/Events/Special-Meetings/Reports-Outbriefs)
• The advantage of having a mini-symposium or tutorials preceding a workshop is to bring all participants up to speed on the state-of-the-art on the topic of the workshop.
  − You may opt to allow participants to sign up for just the mini-symposium or tutorials / workshop portion of the meeting
  − MORS can allow 1-day and 3-day payment options
• A mini-symposium alone is appropriate if the purpose of the meeting is primarily to inform the community.
• A workshop alone is appropriate if
  − The topic is well known and
  − More time needs to be devoted to discussion within working groups to produce a useful product
A typical sequence of speakers at the opening of the meeting is as follows:

- The Special Meeting Chair calls the meeting to order
- The Site host may want to provide a welcome and administrative announcements
- The MORS President, or their representative, gives a welcome
- Sponsor / Proponent Welcome:
  - A MORS Sponsor, or a MORS Sponsor’s Representative, gives the Sponsor’s Welcome, or
  - The Proponent gives the Proponent Welcome
- The Keynote speaker gives the Keynote address to motivate, focus, and stimulate thought in the participants
- Additional speakers provide other presentations, if desired, taking into account the time necessary for work groups, tutorials, etc.
• A smaller number of experts intensively addresses a significant issue in order to better define a problem and present special focus for recommended solutions
• A workshop is more focused and involves doing work to illuminate and to improve the state-of-the-art regarding the selected issue
• Sometimes it follows a mini-symposium that lays the essential groundwork
• Workshop types:
  − Regular planning cycle: short term (60 days), medium term (120 days), and long term (150 days)
  − Sponsor Focused Colloquium: Similar to a workshop, but funded entirely on the MORS contract (no registration fee) with an expedited planning cycle (i.e., 2-3 months)
Sp Mtg Workshop: Two Types

- **Tactical – Analyst focused**: goal is to educate analysts and advance the state-of-the-art of an analysis technique/process
  - E.g., Wargaming Workshop - almost everyone attending will be practicing analysts, with several being junior

- **Strategic – Decision maker focused** (who could be senior analysts like the MORS sponsors): goal is to give decision maker new insights about how they could approach a problem analytically
  - E.g., Airborne ISR and QDR Workshops.
  - Attendees will tend to be more senior and will include more subject matter experts. These may be more risky for MORS as producing these "new" insights is really hard. Sometimes it follows a mini-symposium that lays the essential groundwork.

- The ways one organizes for these two types may be very different, but both depend on having the right people attend.
Sp Mtg Workshop: Sponsor / Proponent

- If there is a Sponsor / Proponent for the meeting, develop a clear understanding of their workshop objectives and expectations in meeting those objectives
  - Talk to the Sponsor / Proponent(s) and their representatives often about your plans and how things are going
  - Elicit their input and get them or their organizations actively involved
  - If there are more than one Sponsor / Proponent, their ideas may not be aligned; the Special Meeting Chair may need time to resolve their differences
- Identify and characterize issues and problems well in advance
  - Develop ideas for solutions to problems
  - Provide an audit trail for assessing both impact and implementation of solutions
Sp Mtg Workshop: Combined Schedule

- Typical Workshop schedule with tutorials & mini-symposium
  - Monday All Day: Tutorials & Planning Committee Meeting
  - Tuesday AM: Plenary Session (Mini-Symposium)
  - Tuesday PM: Mini-Symposium continues or Working Group Sessions
  - Wednesday All Day: Working Group Sessions
  - Thursday AM: Working Group Sessions (work on outbriefs)
  - Thursday PM: Working Group & Synthesis Group Outbriefs

WORKING GROUP KEY: Balance discussion & presentations

Remember that a workshop is to do work; the more presentations there are, the less work there will be.
• Get the very best WG Chairs you can!
  – Commit them to the event as early as possible, and delegate
  – Past experience as a WG chair, Co-chair or Assistant Chair is desired
  – They can engage a facilitator, if desired
  – Sometimes it will be preferred to have government & industry co-chairs instead of chairs

• It is crucial to have co-chairs / assistant chairs for each group
  – Both to balance capability and
  – As a backup in case a chair is unable to attend
• The bulk of the WG Chair effort should be in advance of the workshop
  – At the end of the meeting, the only responsibilities remaining are to document the efforts of the working group
  – The Special Meeting Chair should be able to get everything they need to complete the final report before the Working Group Chairs / Co-Chairs depart the meeting
    ▪ Friday morning after the special meeting is a good time for the Chairs to complete their write-ups
  – A draft final report can be circulated to them for a sanity check, but the WG Chairs should not need to write any more material
Advance preparation is the key for everyone
- Especially the participants

The issues to be addressed must be understood by everyone so that the meeting can focus on the product
- One technique is to include some material in the read ahead package (on the MORS website) with instructions
- This can help generate ideas prior to the event to assist in building consensus

The planning committee should develop the invitee list to get high quality participants.
Sp Mtg Workshop: Synthesis Group

• Forming a Synthesis Group
  – The Synthesis Group’s purpose is to capture trends, connections, concepts, themes and findings in a workshop that transcend the boundaries between the individual working groups and that would otherwise not be identified
  – It literally “synthesizes” the discussions/deliberations of the working groups into a set of overarching observations/findings capturing the workshop’s upshots
  – Because of the difficulties of the process, the Synthesis Group is normally comprised of seasoned MORsian’s experienced at doing synthesis at workshops
• Working groups are asked to address the topic and accomplish significant results
• In such short time periods as available for MORS special meetings, this is difficult, even with highly motivated participants
• To accomplish their tasks, good working groups develop a “Code of Conduct,” for example:
  − Criticize only ideas or behaviors, not people
  − Respect each person
  − Keep an open mind
  − Actively participate
  − Keep focused on the subject
  − Listen constructively
  − Start and end on time
There are several ideas to generate discussions.

A couple of examples are brainstorming and the affinity methods.

- **Brainstorming Method**
  - Uses the creative thinking power of the group.
  - Encourages group members to ignore the expected and to think of different, creative and innovative ways to approach the issue.

- **Affinity Method**
  - Each member of the group writes down their ideas on yellow stickies.
  - After the ideas are generated, the yellow stickies are organized into like groupings.

More detailed information on these and other idea generating techniques are available in books and on the web.
Designate a note taker for all working group sessions.

Providing members copies of meeting minutes at the start of the morning can refresh memories and clarify progress and agreement.

The notes are essential to develop summary presentations and proceeding / reports, i.e., the required WG Outbrief with annotated note pages.
Focus is the key quality for Working Group Chairs.

Many fail to focus on getting the desired/ requested information out of their groups.

Instead they try to direct the group towards their own views.

Working Group Chairs must pretend to have no opinions of their own.
• Ask for clarification. Ask members to restate ideas in different ways, to provide examples, or to define confusing terms
• Encourage equal participation among members
• Keep meeting focused on the subject. Don’t allow irrelevant discussion
• Manage time. Remind group of deadlines and time allotments; take action to re-budget time as necessary
• Be positive. Provide encouragements to the group and individuals
• End the discussion. Help the group close the discussion and decide on the issues
• Summarize. Periodically recap what’s been said and restate it to the group in summary form. Then check for agreement.
Sp Mtg Workshop: WG Considerations

- The number of working groups should take into account the number of desired participants and the number of breakout rooms available.
- In general, working groups should be unique (not have overlapping topic areas).
- Generally, 25 people are a limit on productive working group size. Larger groups sometimes split into sub-groups of 8-12 individuals to work a particular topic.
- On the last afternoon of the workshop each Working Group Chair outbriefs their working group results.
The Synthesis Group Chair is a seasoned MORSIAN
The Synthesis Group Chair normally selects the participants assigned to this group
The group members sit in various working groups to gather themes and key thoughts, which are used in the formulation of their report
This group synthesizes the common themes / linkages from the workshop
• Synthesis Groups
  – Synthesizes discussions / deliberations of the working groups into a set of overarching observations / findings capturing the workshop’s upshots
  – By looking across all the deliberations, the synthesis findings enhance the overall outcome of a workshop by identifying themes and connections across the working groups that would otherwise be missed
  – While it routinely makes a good workshop better, a Synthesis Group cannot make a bad workshop good
Notwithstanding the Synthesis Group’s activities, it is often beneficial to foster additional mechanisms for integration across the Working Groups’ efforts.

One such method is leadership cross-talks wherein WG chairs and Synthesis Group members meet at key junctures to discuss their group’s findings, issues, problems, ideas, themes, key findings, etc.; this enables the WG chairs themselves to fold these into their WG sessions.

Another such method is for the Synthesis Group to hold an attendee “Cross-talk” during the time that the WG chairs are finalizing their briefings on the last day; attendees and Synthesizers can discuss and enhance the cross-cutting observations of the workshop.
Sp Mtg Mini-Symposia: Description

- Focuses on timely *exchange* of important state-of-the-art information within a sub-field or a particular application area of military operations research
- Attendance typically would be between 50-150
- Mini-symposia generally should raise awareness of timely issues and directions without necessarily providing solutions
- They may set the stage for a follow-on workshop by addressing the structure and objectives of that meeting
Can solicit more than one meeting co-chair
Recruit as many as you can use, representing as many facets of the targeted community as possible
Use them to identify and solicit papers in specific areas or parts of the community
You may want to divide the program into sessions and distribute responsibility for organizing sessions among yourself and the Co-Chair(s)
The program schedule is almost as important as content in determining meeting quality

- Normal tendency is to schedule too many speakers in the available time
- Recognizing that the questions and discussions are as important as the presentation, allow “extra” slack time in the program
- If time is remaining after questions and answers, you can always take longer breaks or lunch (which should facilitate more discussions anyway)

Schedule extra time for the first presentations in the morning and after lunch

- Attendees are slow getting seated after lunch
- Some time will be lost from the scheduled time for presentations

Questions during presentations will often take up the allotted question and answer time

- May want to restrict questions during presentations if the audience is large
Sp Mtg Mini-Symposia: Variety

• Allow some flexibility with the schedule and consider some variety
• Don’t alter the format simply for change, but seek out different formats to more effectively address specific topics or present differing views
  – Discussant: As learned in working groups for the annual symposia, a good discussant can put a paper into perspective, highlight its positive contributions as well as limitations. Consider planning one or two sessions around your most important papers with discussants for each.
  – Panel Discussion: Some topics are best treated with a panel discussion. Invite experts representing the various positions or facets of the issue to lead a session. Start the session with comments by each expert and follow with questions and answers. Encourage panel members to question each other.
  – Demonstration: Another possibility is a visit to a nearby facility to view and experience simulations or operational activities pertinent to a topic and issue is almost always well received by the participants. The time involved and logistics requirements to make this happen must be weighed against the benefits. Consider videotape or other media to achieve some of the same results without the logistical difficulties.
For a quality program, most presentations will have to be solicited. You can consider an Announcement and Call for Presentations (ACP), but a general call for papers for such a focused event can produce papers of lower quality and are normally less central to the desired focus. However, some good presentations will probably be identified.

Expect some presentation attrition at the last minute. Have a plan to fill the time gap by:
- Having backup papers,
- Extending the discussion on a critical paper, or
- Discussing in-progress work among the attendees.
Sp Mtg Mini-Symposia: Considerations

- A call for presentations can be issued and sent to appropriate points of contact, as well as put on the MORS web-site.
- Sufficient time needs to be allowed for abstracts to be submitted and selected.
  - If authors are asked to write presentations as read-aheads, that needs to be accounted for in the timeline.
- In the case where the mini-symposium is only 1 day, no call for presentations may be required if specific individuals known to be knowledgeable in the topic are invited to present or be part of a panel.
- As with the annual symposium, each speaker must have a disclosure authorization submitted prior to their presentation, even if that presentation is unclassified.
• The purpose is to further the professional development of MORS’ members by offering a series of educational sessions on “new” scientific topics that are relevant to the profession of national security operations research.
  − These mini-symposia focus on a variety of techniques, some of which may be truly new, and / or some older, more established techniques that are being applied in “new” ways.
• MORS has a legacy of conducting education and professional development Mini-Symposia for the education of its members.
  − The complexity and scope of challenges that are confronting today’s decision-makers have served to broaden the set of analytical tools and techniques that should be considered by the practitioners of military operations research.
  − As such, it is appropriate that MORS convene this type of special meeting mini-symposium to ensure that MORS’ members have the opportunity to maintain their currency.
• The target audience for this type of special meeting mini-symposium includes both operations research (OR) analysts and OR managers.
Sp Mtg Colloquia: Description

- A small conference or seminar (typically 25-130 attendees, but size is not the determining factor in meeting type).
- Held to periodically update progress in a general national security operations research areas.
- An example is the annual MORS Education & Professional Development (EPD) Colloquium:
  - The goal of the Colloquium is to bring great minds together and to provide a variety of presentations on all aspects of Operations Research (OR) education and the professional development of analysts.
  - The Colloquium provides speakers who represent OR analytical agencies, professional societies, operational field analysts, civilian and military educators, students, OR practitioners, and sponsors of OR professional development programs.
Sp Mtg Types: Summary

• In this module, you received:
  − An overview of the types of special meetings and
  − Suggestions specific to the type of special meeting

• In the next module, you will learn about the Special Meeting Team
  − Supporting Team
  − Planning Team
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