JPL D-4956

GUIDANCE FOR CONFERENCE RAPPORTEURS

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November 15, 1987

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Preface

This document is a product of the Post Conference Sub-Committee of the National Conference on Strategic Management of Research and Development to be held in Crystal City, Arlington, Virginia, June 14-16, 1988. The conference is sponsored by the AIAA, AIA, IEEE, and EIA in cooperation with DoD and NASA. The Post Conference Sub-Committee members as of the date of this publication are listed below.

Although this document contains guidance for rapporteurs who will be recording information for the National Conference summary report; it also provides some discussion of summaries and it contains a suggested outline for the summary report. Other recommendations and additions to this document are welcome and should be addressed to any of the Sub-Committee members listed below:

National Conference on Strategic Management of R&D (STRATRAD)

Sponsored by:
> American Institute of Aeronautics and Astronautics
> Aerospace Industries Association
> Institute of Electrical and Electronics Engineers
> Electronic Industries Association

In Cooperation With:
> Department of Defense
> National Aeronautics and Space Administration

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Acknowledgment

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Guidance for Conference Rapporteurs

1.   INTRODUCTION

The first National Conference on The Strategic Management of Research and Development (STRATRAD) is being presented by the American Institute of Aeronautics and Astronautics (AIAA), Aerospace Industries Association (AIA), Institute of Electrical and Electronics Engineers (IEEE), and the Electronic Industries Association (EIA), June 14-16, 1988, at the Hyatt Regency Crystal City Hotel, Arlington, Virginia.

The conference will gather industry chief executive officers, government executives, and academic leaders. The focus will be on vital R&D issues in aerospace, electronics, and related technologies and will tie into President Reagan's initiative on competitiveness.

This document has been prepared to assist the sponsoring organizations in preparing a summary report of the conference. It contains advice and guidance for rapporteurs who will be taking appropriate notes tc be used in the summary report.

2.   THE MECHANICS OF NOTE TAKING

2.1   Where to Sit

Always sit as close as possible to the speaker's position. Some presenters may mumble or have idiosyncratic ways of speaking. In spite of audio enhancement systems, it helps to sit close to the speaker to capture emphasis, feeling, and attitude.

2.2   Lights

Try to sit under a strong ceiling light to give you the best illumination possible to help in note-taking. Even if the lights are dimmed for a slide or transparency presentation, you will still have the most light available under the circumstances. This advantage disappears if the lights are turned off completely. Ask the moderator of the session not to do so.

2.3   Projection

When you enter the presentation room, see if you can determine whether slides or transparencies will be shown. Try to sit where there is a clear view of the screen recognizing that the speaker or an assistant might stand where your view is blocked or intermittently blocked.

2.4   Equipment

It might sound trivial, but it's important to be sure to come equipped with several pens, pencils, etc. Use a note pad, similar to that used by secretaries, with a binding at the top so that pages can be flipped over easily and quickly and the pad can lie flat on your lap or on an armrest. Other types of notebooks are acceptable, but loose pages are discouraged. If you use a tape recorder, be sure you have enough tapes. Use 90-minute tapes as opposed to shorter lengths. If you use a camera, be sure to have film rated for use in a darkened room.

3.   GUIDANCE FOR THE RAPPORTEUR

3.1   The Agenda

The rapporteur should have an advance copy of the agenda so that he or she is aware of: (1) number and titles of concurrent sessions during each day, (2) number and names of keynote and special speakers, (3) number and names of presenters within panels. Try to obtain the names, addresses, and phone numbers of session chairpersons and coordinators well in advance of the conference.

3.2   Presentation Materials

Try to get copies of audio tapes, the oral (typed) presentation, and copies of viewgraphs. Getting the typed presentation and viewgraphs in advance, if possible, is even better. If you feel that more contact is needed later, approach the speaker at the end of the presentation; give him or her your business card and explain your role. Tell the speaker specifically what you want and why. For example, you might want the speaker to review your draft, or to only clarify a point, or receive copies of backup material. Also, indicate the time-urgency of your need.

3.3   An Open Mind

A rapporteur must approach the task with an open mind, recognizing that one comes to a meeting with specific goals in mind, and with a background of past information that may color his or her approach to the note-taking task. Keep the theme of the session in mind and try to capture concepts, generalizations, and items that receive special emphasis by the speaker. Also try to capture unique statements that can be

nicely quoted. Place yourself in the speaker's shoes and express ideas from his or her point of view. If your own biases come into play or if you have your own good points to make, so annotate your notes in the margin or in brackets.

3.4 Outlining

Most presentations are well organized and usually follow a set outline. Take notes as though you were reconstructing the same outline. Capture the main points and write a few supporting words to refresh your memory later. Under the main points, try to highlight key ideas or overriding conclusions. If the speaker uses slides or viewgraphs, be careful not to get lost in the detail. Concentrate on the speaker's remarks, even if it means not reading the visuals at all. Later, you can integrate some viewgraph detail into your material. Write your notes so that the next morning you can be in a position to tell a complete but short story. No doubt you will have to rewrite each presentation to fit the summary report outline.

3.5 Panel Speakers and Questions

Be especially alert to those presentations that you expect to be most relevant, but don't underrate the others. Remember that your aim is to capture the highlights of a presentation. In taking notes of the panel discussions, bear in mind that, comments from the panel participants are not contained in their formal papers, but may be valuable and helpful additions to the summary report. Treat the question and answer sessions similarly.

3.6 Two Rapporteurs

If possible, each rapporteur should have a backup person performing the same functions. Immediately after each session, compare notes with your backup. A better product will undoubtedly result when the material is integrated.

3.7 Use of Transcripts

If a transcript of the presentation is available, it may be tempting to edit it directly rather than develop a summary from the rapporteur's notes. Experience has shown this to be a poor approach because of the inherent repetitions and digressions in an oral presentation. A transcript is chiefly useful to verify and highlight key points, which should then be appropriately converted to fit the format and philosophy of the summary report.

4. DISCUSSION OF SUMMARIES

Summaries are usually aimed at the attendees to refresh their memories about sessions they have attended or to give them information about sessions they did not attend. When the full proceedings document is not available, the summary report is the only written record of the conference. For this reason, it should be complete in itself, and the information must be clear not only to the attendees but also to non-attendees. Often, outside organizations including libraries receive summaries. It is wise for the rapporteur to keep both audiences in mind. To be most effective, summaries should be produced within 60 to 90 days after the conference has taken place because interest declines with the passage of time.

Although summaries can be prepared in chronological order, i.e., the same order as the agenda, this document suggests a contextual order, i.e., summary groupings of information according to the subjects with which they deal. Contextual summaries are more satisfying to the reader than chronological summaries, but are more difficult to organize and write.

The summary preparer should include the complete agenda of the conference in the summary report for easy reference by the reader. A tentative agenda for the National Conference summary report is presented in Section 5.

5. DRAFT TABLE OF CONTENTS FOR THE SUMMARY REPORT OF THE NATIONAL CONFERENCE

(1) *Introduction*: Why is the conference being held?

(2) *Goals and Objectives*: What does strategic management of R&D want to accomplish?

(3) *Present Situation*: Domestic and international aspects of productivity, quality, and competitiveness.

(4) *Challenge*: What should and can be done now?

(5) *Strategies for Management of R&D*

   (a) Planning Strategies: Visions, Forecasts, and the Transition to Performance.

   (b) Personnel and Organization: The Development and Use of People, Teams, and Leaders within Appropriately Designed Organizations.

   (c) Innovation: Creativity and New Ways to Effect Strategic Management of R&D.

   (d) Technology Implementation: How to Efficiently Get from Plans to the Marketplace.

   (e) Skepticism: Can R&D Really be Planned and Managed Strategically?

(6) National Resources: What Do We Need to Focus on Considering the Problems Raised?

(7) Future: What Should be Done in the Future Based upon Lessons Learned from this Conference?

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