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What Makes for Successful Conferences?
Lessons Learned from an Evaluation of Six Conferences Sponsored by the World Bank Institute

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WBI Evaluation Studies
Number ES99-34

World Bank Institute
The World Bank
Washington, D.C.

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Executive Summary

Purpose of This Report

The purpose of this study was to identify major lessons learned and implications for the planning and conduct of future World Bank Institute (WBI) conferences. These are based upon a review of the experiences and evaluations of six recent conferences sponsored by WBI:

- The 1997 Mediterranean Development Forum — Marrakech, May 1997 (MDF1)

- The Global Knowledge '97 Conference — Toronto, June 1997 ('GK97)

- The Asian Development Forum — Manila, March 1998 (ADF)

- South Asia Beyond 2000 — Colombo, March 1998 (SA2000)

- The Global Connectivity for Africa Conference — Addis Ababa, June 1998 (GCA)

- The 1998 Mediterranean Development Forum — Marrakech, September 1998 (MDF2)

Each of the conferences considered in this review has been separately evaluated, with a detailed evaluation report on each conference published by the WBI. Each of these evaluation reports discusses findings and implications specific to a particular conference, as well as the evaluation methodologies that were used.

*Hence, the primary purpose of this current report is to identify major themes and implications arising from across all six conferences. Its emphasis is on the identification of lessons learned which can help in the planning and implementation of **future** conferences, rather than a detailed presentation of specific findings regarding past events.*

Evaluation Approach

This review used a cluster evaluation approach in order to identify major themes and implications arising from across all six conferences. It is based upon a review of comprehensive evaluation reports prepared for each of the above conferences; interviews with the task managers, an operational contact for each conference and with the evaluators; and a review of other available documentation. This review used a cluster evaluation approach in order to identify major themes and implications arising from across all six conferences. The concept of cluster evaluation was first developed by the W. K. Kellogg Foundation, for the purpose of looking "across a group of projects to identify common threads and themes that, having cross-confirmation, take on greater significance." Kellogg indicated that the purpose of cluster evaluation is to be constructive, using aggregate information to identify common themes and to learn not just "what happened" but "why those things happened." Its major

purpose is "to improve, not to prove," to identify lessons learned and implications for future initiatives.[1]

This review was based primarily upon information found in existing documentation, along with perceptions about conference intent and impact obtained through interviews. It is bound by the same limitations as in the primary source data. For example, each of the six evaluation reports identified limitations such as unrepresentative and/or low sample sizes, a limited range of questions addressed and sources of data (e.g. the evaluations relied mainly upon ratings of conference participants at the time of the conference, without follow-up afterwards).

Interviews for this review were, by design, open ended in nature. This permitted the identification of considerable information that could not be anticipated in advance, and exploration of lines of questioning that came up during the discussion. But because the same exact questions were not asked of everyone, it is not always possible to quantify responses. Available documentation about some of the conferences was more complete and illuminating than what was available for the others.

Nevertheless, despite the above limitations, a generally clear and consistent picture emerged about those factors that seem to be most closely associated with conference impact. This information is sufficient to identify major lessons learned from the six conferences considered in this review, and to suggest considerations for future conferences.

Conference Objectives and Overall Outcomes

The conferences that were reviewed in this study had ambitious objectives. All were set up to provide for exchange, debate and dialogue among high-level participants from a range of sectors about the challenges facing a region and to build at least some degree of consensus about potential solutions. All conferences hoped to result in new and enhanced partnerships and working relationships, to create awareness about the need for action on pressing issues, and to influence the policy direction of countries and their agencies, regional institutions and others. *A key objective of all conferences was to serve as a springboard to concrete action of some form afterwards.*

A major, although unwritten, objective of all conferences was also to influence future policy directions and working relationships within the World Bank (the "Bank") itself, and to help bring the Bank more in touch with the region. Conferences provided an opportunity for the Bank to obtain feedback from others about its own efforts and to receive ideas about what else it should be doing. Task managers indicated that the Bank can learn and benefit as much itself as can others from the conferences, and that conferences are a major way to assist the Bank in aligning its own activities with the priorities of the region. For example, one person stated: "These events transformed the Bank more than the Bank transformed others."

All conferences succeeded in attracting high-level participants from a range of sectors. To a greater or lesser extent, they have succeeded in creating greater awareness and understanding, and the development of new or enhanced partnerships and working relationships. Contacts for all six conferences emphasized many of the intangible benefits of high profile conferences. For example, they indicated that the mere fact that such gatherings take place, involving a diverse group of high-level people who have never had an opportunity to come together before, can represent a significant outcome in its own right.

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[1] Chapter 1 of the full report provides citations for these quotes.

Participants had mixed views about the conferences and their components. However, all conferences received high ratings for relevance and generally positive ratings for overall effectiveness. MDF2 and ADF received the highest ratings. It is unclear, however, if the conferences have influenced policy directions or resulted in other outcomes following the conferences. Two exceptions are the MDF conferences. The evaluation reports for these conferences, as well as interviews with Bank staff and other documentation, indicate that these conferences led to a number of subsequent activities that have contributed to the policy debate, as well as some tangible outcomes, in the Middle East and North Africa (MENA) region.

Conference Approach and Organization

The most persistent complaint of participants at *all* the conferences was the lack of sufficient opportunity for more participation and interaction. At *all* conferences, sessions with the most opportunity for participation received higher ratings than those using lecture formats. *Lack of opportunity for participant interaction, and excessive use of one-way presentations, represents the most important, and the most consistent, finding, from the evaluations of **all** the conferences.* As *the evaluation of MDF2* (p. 36) *stated: "The World Bank — and especially its external training arm, the World Bank Institute — needs to hear this message."*

While there is increasing awareness of the need to provide for more participation at future conferences, this does not appear likely to happen unless the primacy of participant interaction is clearly articulated as an objective and concrete procedures are developed. In particular, there is a need to consider alternative conference designs that provide for participation and interaction as a key design feature rather than an add-on. There is a major need for guidelines, directions, and possibly training to moderators to enable them to better control their sessions. The MDF3 conference planning committee is developing guidelines along these lines. It would be worth monitoring how well they work when this conference takes place.

Similarly, it should be recognized that conference participants, for the most part, are experts in their own right who attend for a collegial exchange of views rather than to be trained. *In this respect, conferences are qualitatively different from many other events sponsored by the WBI.* Use of a training model in conference sessions, rather than an approach emphasizing learning and sharing, frustrated participants and inhibited conference impact. *It also represents a major missed opportunity to draw upon the knowledge and expertise of the high level participants, and was a key factor limiting greater conference impact.*

Another key finding from the evaluations of all six conferences is that, perhaps paradoxically, trying to squeeze in too much into a conference can result in less impact than through a more focused approach. Conferences are more likely to be effective when the agenda is not completely packed with formal sessions filling up all the time, and when there is "free" time for participants to interact with one another. *Having too many people present can impede the principal conference task of engaging high-level participants in consideration of issues and identification of future policy directions and strategies.*

Strategic Considerations

Conferences are expensive undertakings for events that last just a few days. The value and impact of conferences can be magnified greatly beyond simply what happens during their

two or three-day period when they are viewed not as one-off events but as one component of a larger strategy, such as moving the Bank's strategy for a particular region in a particular direction. *All aspects of conference planning, management and evaluation need to focus on intended outcomes following the **end** of the conference.*

For example, the MDF conferences were never intended as stand-alone events, but instead were embedded as part of the Bank's strategy in the MENA region. Plans for follow-up were included from the beginning. This strategic approach probably is responsible for the amount and quality of the various follow-up activities following MDF1 and MDF2. In contrast, while follow-up action was an objective for the other conferences as well, what actually occurred appears to be much more limited.

A number of those interviewed emphasized that the Bank wishes to use its resources to help develop the expertise of others, to shift from a "retail" to a "wholesale" approach. Conferences have the potential to be a major support for this direction. One of the major lessons learned from these conferences is the importance of process. In particular, the best way to develop the capacity of others is to delegate authority to them, while providing support, guidelines and tools. In this way, learning happens through doing — rather than through telling others what they should be doing. All conferences have involved partners in conference planning. MDF3 is going beyond this, where the Bank has given the lead in planning and coordination of the conference to others.

There does not appear to be a consistent approach to identifying conference findings and implications, nor to disseminating this information to others. This has limited the potential to capitalize on what has been learned at the conferences. It appears to be a key factor limiting follow-up action. There has been minimal use of previous conference evaluations when planning new conferences. As a result, many of the same difficulties and limitations keep on being repeated from conference to conference. Thus there appears to be the potential for a more systematic approach to act upon what has been learned at conferences.

The overall MDF process can be viewed as a best practice example. For example, the MDF conferences have always been embedded in the Bank's strategy for the MENA region. They were never intended to represent stand-alone events. Planning for MDF2 took into account what was learned from the experiences and evaluation of MDF1. Similarly, planning for the forthcoming MDF3 is taking into account what has been learned from the previous conferences. There is much that can be learned from the MDF process for future conferences.

Conclusion

Conferences sponsored by the Bank are high profile events, with the potential to stimulate significant follow-up action — by governments, regional and other institutions, and by the Bank itself. In this respect, they are quite different from training events.

These conferences have resulted in new and enhanced partnerships and working relationships, and they have helped to create awareness about the need for action on pressing issues. Their impact on stimulating future action and policy change, however, has been uneven. This review has found that in order for the potential for impact to be enhanced, *all aspects of conference planning, management and evaluation need to focus on intended outcomes following the **end** of the conference.* Conferences need to be viewed, not as one-off events, but as one component of a larger strategy. Generally those conferences which took a strategic approach and built in specific plans for follow-up as part of the initial planning process appeared to be the most successful.

The most consistent limitation of all six conferences was an over-emphasis on a lecture format, with too much packed into individual sessions and in conferences overall. This "quantity vs. quality" approach has limited the effectiveness of *all* the conferences. It represents a major missed opportunity to capitalize on the high level of expertise among the invited conference participants.

This review has identified the potential of evaluation — the potential to learn from the experiences of past events in order to improve the effectiveness of future conferences. Thus far there has only been sporadic attention, rather than a consistent approach in drawing upon the lessons from past conferences when undertaking new events. The Bank has developed considerable expertise in the area of large, international conferences. There are opportunities to capitalize more on what has been learned and implications for future action — within the Bank itself and in assisting others in planning future events.

What makes for Successful Conferences?
Lessons Learned From an Evaluation of Six Conferences
Sponsored by the World Bank Institute

Chapter 1
Introduction

Purpose of this Report

The purpose of this study was to identify major lessons learned and implications for the planning and conduct of future World Bank Institute (WBI[1]) conferences. These are based upon a review of the experiences and evaluations of six recent conferences sponsored by WBI:

- The 1997 Mediterranean Development Forum — Marrakech, May 1997 (MDF1)

- The Global Knowledge '97 Conference —Toronto, June 1997 (GK'97)

- The Asian Development Forum — Manila, March 1998 (ADF)

- South Asia Beyond 2000 — Colombo, March 1998 (SA2000)

- The Global Connectivity for Africa Conference — Addis Ababa, June 1998 (GCA)

- The 1998 Mediterranean Development Forum — Marrakech, September 1998 (MDF2)

As this report discusses, conferences are high profile events with the potential to result in significant outcomes, important to the World Bank (the "Bank") itself as well as to others, which may be difficult to achieve through other means. For example, effective conferences have the potential to create new working relationships, to jump-start new initiatives, and to enhance how the Bank is viewed by others. Conversely, conferences which are irrelevant, poorly organized, or which do not result in impact of some form, can represent a waste of resources — or worse.

The Bank is certain to sponsor more conferences in the future. Indeed, there are follow-ups planned to some of the conferences considered in this review. In order to make future conferences as effective as possible, it would be useful to identify what can be learned from experiences with past conferences. Each of the conferences considered in this review has been separately evaluated, with a detailed evaluation report on each conference published by WBI. Each of these evaluation reports discusses findings and implications specific to a particular conference, as well as the evaluation methodologies that were used.

Hence, the primary purpose of this current report is to identify major themes and implications arising from across all six conferences. Its emphasis is on the identification of lessons

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[1]Until very recently (March, 1999), and when all of these six conferences were held, the WBI was known as the Economic Development Institute (EDI). For convenience, this report refers to WBI, even when the original documentation mentioned EDI.

*learned which can help in the planning and implementation of **future** conferences, rather than a detailed presentation of specific findings regarding past events.*

Evaluation Approach

This review has taken a cluster evaluation approach. The concept of cluster evaluation was first developed by the W. K. Kellogg Foundation, in order to identify lessons learned across a range of projects that share some similarities, as well a number of differences.

As Sanders had indicated:

> "Cluster evaluation is not a substitute for project-level evaluation, nor do cluster evaluators 'evaluate' projects. . . . Project-level evaluation is focused on project development and outcomes related to the project stakeholders. Cluster evaluation focuses on progress made toward achieving the broad goals of a programming initiative. In short, cluster evaluation looks across a group of projects to identify common threads and themes that, having cross-confirmation, take on greater significance. Cluster evaluators provide feed-back on commonalties in program design, as well as innovative methodologies used by projects during the life of the initiative."[2]

Kellogg has indicated that the purpose of cluster evaluation is to be constructive, using aggregate information to identify common themes and to learn not just "what happened" but "why those things happened." Its major purpose is "to improve, not to prove," to identify lessons learned and implications for future initiatives.[3] Kellogg does not use cluster evaluations to rate or to compare projects. It only asks for aggregate information, in order to encourage projects to be open in identifying weaknesses as well as accomplishments of their project that can be useful in planning other undertakings.

In keeping with the principles of a cluster evaluation, information for this review came from the following sources:

- Review of the comprehensive evaluation reports that were prepared for each of the six conferences.

- A group meeting, as well as individual interviews, discussions, and E-mail exchanges, with the evaluators, including WBI staff and an external evaluator.[4]

- Individual interviews with the task managers and with a senior staff person from the Bank's operational area (hereafter referred to as "operational contacts" or "operational staff") for each of the conferences.[4] The interviews with the task managers averaged an hour or slightly more. Those with the senior operational staff were about 30 minutes each.

- Review of other documentation provided by the persons interviewed. This varied considerably from conference to conference and included materials such as: pre-conference brochures; conference programs; participant lists; press clippings; publica-

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[2]James Sanders. 1998. "Cluster Evaluation." *The Evaluation Exchange: Emerging Strategies in Evaluating Child and Family Services.* Vol. 4(2), pp. 7-8. Also see: James Sanders. "Cluster Evaluation" in Eleanor Chelimsky & William R. Shadish (Eds.). *Evaluation for the 21st Century.* Thousand Oaks, CA: Sage Publications (1997).
[3]Blaine R. Worthen and Constance C. Schmitz. 1997. "Conceptual Challenges Confronting Cluster Evaluation." *Evaluation*, Vol. 3(3), pp. 300-319.
[4]See Annex 1 for a list of the persons interviewed.

tions following the conferences; internal documentation such as a conference evaluation report prepared by a task manager, a Back to Office Report, minutes of meetings; postings to Web sites; and other written information.

Annex 2 provides the design matrix that served as a starting point and an initial basis for asking questions and considering findings. All interviews were open-ended in nature. Generic interview guides were prepared to help guide these interviews. These were adapted considerably, however, in order to ask specific questions of greatest relevance for each person who was interviewed. Furthermore, a responsive approach was followed. In the process of carrying out this review, other questions and issues warranting consideration emerged and were explored as appropriate. The same basic approach was taken for the interviews with the task managers and with the operational staff. Questions and other issues arising were explored in greater depth, however, with the task managers, given the availability of more time as well as their greater familiarity with the conference process.

Methodological considerations and limitations

This review was based primarily upon information found in existing documentation, along with perceptions about conference intent and impact obtained through interviews. Where possible, it looked for consistencies and cross validation across different sources of data (e.g. comparing observations of different people who were interviewed, and with written documentation where available). The scope of this review did not permit obtaining primary data, e.g. speaking to partners, follow-up with participants, or independent verification of impact as reported in interviews.

Consequently, this review is bound by the same limitations as in the primary source data. For example, each of the six evaluation reports discusses limitations such as unrepresentative and/or low sample sizes, a limited range of questions addressed, and sources of data. The evaluations relied mainly upon ratings of conference participants at the time of the conference, without follow-up afterwards. Available documentation for some of the conferences was more complete and illuminating than what was available for the others.

The qualitative nature of the data resulting from the interviews with the task managers and operational contacts affects how the information arising from these interviews can be treated. The purpose of qualitative information generally is not to provide countable responses, but to generate ideas, description and information. What the persons interviewed could say was not predetermined or limited to specific questions or response categories. This permitted the identification of considerable information that could not be anticipated in advance, and to explore lines of questioning that came up during the discussion. Furthermore, a key observation by one person may be of broader importance and shared by others, even if others did not also comment on that topic. Qualitative data gathering also permits taking into account factors such as the intensity of views and emotions. Another strength is the ability to explore possible reasons for what took place.

By design, the same exact questions were not asked of everyone. Some people made observations which others might have agreed with, if they had been specifically asked. Thus the fact that just one or two people may have made a given observation does *not* mean that other disagree, or that it would not apply to others or to the other conferences. Thus in most cases it is not possible to attempt to quantify these data. Accordingly, counts are provided only where it is possible and appropriate to do so.

Nevertheless, despite the above limitations, a generally clear and consistent picture emerged about those factors that seem to be most closely associated with conference im-

pact. This information is sufficient to identify major lessons learned from the six conferences considered in this review, and to suggest considerations for future conferences.

Chapter 2
Conference Objectives and Overall Outcomes

Key Conferences Objectives

What were these six conferences expected to accomplish? Specific objectives, of course, varied from conference to conference. Nevertheless, based upon statements in documentation, as well as what the task managers and operational contacts said about the purposes of the conferences, there was a high degree of overall consistency about key objectives.

Concrete Action

Perhaps the most important objective for all the conferences was that they were expected to act as a springboard to concrete action of some form *following the conference*. For example: "Participants expressed the need for concrete follow-up activities."[5] (MDF1). "By focusing on *concrete strategies and options* for increasing African connectivity, this conference will help to define specific steps forward in realizing the goals . . ."[6] The contacts for MDF1 and MDF2 emphasized that these conferences were never intended to be one-time events. Contacts for two other conferences suggested that the success or failure of *any* conference sponsored by the Bank could be judged by the extent of follow-up activity. As Chapter 4 discusses, a factor critical to follow-up is that the conference be tied into a broader process and not be viewed as a one-off event.

> *All conferences were expected to result in some form of follow-up action.*

Following are other key objectives common to all the conferences:

- To provide opportunities for exchange, debate and dialogue among high level people from a range of sectors, in order to build at least some degree of consensus about the barriers and potential solutions to the challenges facing the region.[7]

- To develop and to enhance partnerships and networks.

- To increase the capacity of regional organizations and institutions.

- To play a catalytic role in creating greater awareness and understanding about issues the Bank feels are important.

> *The GCA conference brochure said that the conference was "designed to maximize dialogue and interaction," with "ample time" for informal consultations. Documentation for other conferences, as well as interviews with task managers, similarly indicated that **all** the conferences were intended to provide an opportunity for dialogue, discussion, and the creation of at least some consensus.*

- To help connect individuals and institutions with their counterparts in other settings, in order to provide a sense of the big picture and opportunities for further contact.

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[5] Sophie Claudet (Ed.). (1997). *Education for the Future: Proceedings of a Regional Education Policy and Research Seminar.* Mediterranean Development Forum, p. i.
[6] *Issues and Options.* (1998). Global Connectivity for Africa conference brochure, no pagination.
[7] GK'97 did not have a regional focus. Nevertheless, it shared this same overall objective.

Most conferences also sought to influence the policy-making process of countries and institutions in the region, and to provide for more of a regional perspective. ADF, coming in the midst of the Asian financial crisis, sought to identify possible steps to alleviate the current crisis. In contrast, an objective of SA2000 was "to agree on the nature of the future policy agenda."[8] MDF was somewhere in the middle, with both a short and long-term time horizon. GK'97 was different from the other conferences in having a topical rather than a regional perspective. GCA was a mixture: its focus was Africa, but specifically with respect to telecommunications.

The above information about conference objectives was drawn from the interviews and from the available documentation about each conference. In a group meeting, the evaluators indicated that conference objectives rarely were specified clearly in advance of the conference. Thus it is not clear to what extent conference objectives guided the conference planning, or were articulated only after the fact.

The Bank Itself is a Major Beneficiary of the Conferences

Conferences sponsored by WBI ostensibly were convened to get others to increase their knowledge and awareness and to take action. All written statements of conference purposes or objectives, including all the evaluation reports, reflect this focus.

An interesting and important finding from all the interviews, however, is that a major motivation for sponsoring these conferences, as well as some of their key outcomes, concern *impact within the Bank itself*.

When asked why the conference was held and what its major benefits were, the task managers for the four regional conferences in particular emphasized the following:

"Operations didn't know who we [WBI] were then. . . . [The Forum] brought us closer to the Region."

- To assist the Bank itself in becoming more aware of key issues and in getting closer to the Regions.

- Greater coordination internally within different parts of the Bank, in particular between WBI and Operations.

- Assisting the Bank in moving from a country to a region approach and in getting in closer touch with key policy makers in the Region.

- Making the Bank more aware of the challenges and needs of the Region, and in providing more attention to the Region in the future.

Representatives for all the conferences also identified other benefits to the Bank. Some that were frequently mentioned include:

At the MDF2 conference, women participants met with Mrs. Wolfensohn and identified many concerns they had about Bank activities and approaches. This led to the creation of a network of women who are now involved in commissioning evaluations of some of the Bank's loans.

- Providing a high-profile forum for the Bank to place its issues on the table and to move forward its own agenda.

- Providing an opportunity for the Bank to publicize and to showcase its own expertise and resources.

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[8] Evaluation report for the SA2000 conference, 1999, p.3.

- Providing an opportunity for the Bank to obtain feedback from others about its own efforts and to receive ideas about what else it should be doing.

Indeed, the manner in which task managers spoke[9] suggested that they may have considered benefits to the Bank as important as the stated conference objectives. Several people emphasized, for example, that the Bank can learn and benefit as much itself as can others from the conferences, and that conferences are a major way to assist the Bank in aligning its own activities with the priorities of the region. Given the importance placed to this objective, it would seem

> *"These events [MDF1 and MDF2] transformed the Bank more than the Bank transformed others."*

appropriate in future conferences for the Bank to be explicit about what it hopes to gain. Comments by a few of the people interviewed suggested that this might help demonstrate the Bank's interest in being an open and responsive organization.

Overall Conference Outcomes and Participant Reactions

Outcomes Following the Conference

As indicated above, the major purpose of each of the conferences was to result in action of some form *following* its conclusion. Following are examples of tangible spinoffs which, according to the task managers and operational contacts, have occurred as a result of each of these conferences:

MDF1 and MDF2
- Creation of a number of new partnerships, networks and working relationships through the region
- Numerous activities organized by these new networks
- Conferences integrated into the Bank's overall operations in the MENA region
- Meeting of women who now are involved in commissioning evaluations of the Bank's loans
- Moroccan reform program highlighted by the government at the conference
- Thinktanks and other partners in the region now taking the lead in regional planning and other activities, such as in the organization of the forthcoming MDF3
- Publications, including Voices from Marrakech (MDF1) and Participation and Development (MDF2), presenting conferences highlights

SA2000
- Creation of the South Asia Central Bank Governors Forum
- Creation of the South Asian Network of Economic Institutes

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[9] Based, for example, on the order in which these objectives were mentioned in response to an open-ended question, the intensity and emotion displayed, and the nature of the discussion.

GK'97	• Formation of the Global Development Partnership
	• Creation of the GKD97 Internet discussion list, which started before the conference and is still ongoing
GCA	• Contribution to the momentum of the African Connectivity Project
ADF	• The contacts for this conference could not identify specific tangible outcomes, nor were any mentioned in the documentation that was reviewed.

All the contacts emphasized, in one way or another, that the conference venue also provided opportunities for many intangible outcomes and benefits. They indicated that while these outcomes can be difficult to document and to quantify, they nevertheless are important. For example, contacts for all six conferences indicated that because of their high profile, conferences can create considerable awareness (or a "big bang") which would be difficult or impossible to achieve through other means. They indicated that the mere fact that such gatherings take place, involving a diverse group of high-level people who have never had an opportunity to come together before, can represent a significant outcome in its own right.

Similarly, contacts indicated that the impact of a conference, when it works, can go well beyond that of its individual components. Examples of other intangible outcomes cited include: serendipitous contacts and exchanges among participants; a reinforced sense that there is local expertise, for example through the presence of plenary speakers from the region; enhanced profile for the Bank through being involved in such an undertaking; press coverage; a renewed sense of confidence and energy.

The MDF1 and MDF2 conferences provided an opportunity for discussion of topics which are usually considered taboo, or undiscussable, by governments together with representatives of the intellectual community in the MENA (Middle East and North Africa) Region. The GCA conference provided an opportunity for representatives of many government regulatory bodies to come in contact with private sector providers of innovative telecommunication technologies for the first time.

To what extent were the conference objectives listed above actually realized, as well as the tangible and intangible outcomes claimed by the task managers and operational staff? Given that conference evaluations did not follow-up after the end of the conference, nor consider reactions of partners except to a limited extent, there is limited hard data about actual conference outcomes. There is documentation, in most cases, confirming the tangible outcomes listed above. When asked, the contacts claimed that these outcomes could not have occurred without the conference. It was not possible in this present study to confirm these claims, such as through interviews with the people and organizations involved.

Except for MDF, there is limited evidence about what newly created partnerships or networks have done subsequently. There is little evidence one way or another confirming the extent to which objectives such as: development of a consensus among experts, changes in policy among countries/regional organizations, and changes in what the Bank itself does or how it is viewed have been realized or not. Follow-up evaluation, exploring these and related questions, would be required. Nevertheless, based upon what is known, it appears that impact has been uneven, with the potential for even greater impact. The following chapters discuss factors that appear to enhance conference impact.

Participant Reactions

As the following table indicates, all the conferences were rated high for relevance, and received generally positive ratings for overall effectiveness. These figures, however, should be treated with caution. Comparisons across conferences are difficult. The actual questions asked, the context in which the questionnaire was administered, the characteristics of participants, and the response rates varied considerably from conference to conference. Satisfaction ratings in general, and in particular those obtained at the conclusion of an event, tend to be subject to exaggeration and to be unrepresentative of those who were not present. Overall end-of-session ratings rarely are neutral or worse.[10]

Ratings of Conference Relevance and Overall Effectiveness,

Based on a 5-point scale

	Relevance to one's job/professional work[a]	Overall effectiveness of the conference[a]
MDF1	3.8	3.8[b]
GK'97	3.8	3.2
ADF	4.0	3.9
SA2000	3.9	3.7
GCA	4.0	3.7
MDF2	n/a[c]	3.9

[a]Average ratings, based upon a five-point scale, with 1 low and 5 high. Ratings for MDF1, GK'97 and ADF were converted from a six-point scale, following the recommended procedure discussed on page 14 in the MDF2 evaluation report.
[b]The question asked for this conference was to what extent the forum had been a worthwhile use of one's time.
[c]A rating of 4.1 was obtained for this conference to the question concerning to what extent the forum had been a worthwhile use of one's time.

These overall ratings also mask significant differences regarding various aspects of the conferences. As would be expected, ratings from session to session (or workshop to workshop) varied considerably. With some exceptions, ratings about specific workshops, questions about what participants gained from the conference, and the likelihood of participants applying what they have gained afterwards, tended to be lower than ratings regarding overall conference effectiveness. A number of ratings are just above the midpoint, suggesting only weak support, with both positive and negative views. *The two factors that seem to be associated most closely with ratings of specific sessions/workshops concern the quality of the presentations and opportunity for participation.*

Average ratings need to be treated with caution. At all conferences, there was considerable variability in the various ratings obtained. That is to say, while some individuals would rate

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[10]A separate WBI Evaluation paper, *Lessons Learned about the Evaluation of Conferences,* discusses methodological considerations such as response rates.

the overall conference and specific attributes very highly, a significant minority of participants provided negative ratings on all or some aspects of the conferences. *This variability is a significant finding in and of itself.*

It is unclear *why* there were such mixed perspectives among participants at the same conference. Some sessions were viewed more positively than others were, and a significant minority of participants provided negative ratings on all or some aspects of the conference. Understanding *why* some people were less positive than others can be very helpful information in the planning and design of future events, as well as in aiding in participant selection. This would appear to be an area for attention in future conference evaluations.

*There were mixed perspectives among participants at all the conferences. Understanding the **reasons** for this variability could assist in the planning and design of future conferences.*

MDF2 and ADF seem to have obtained the highest ratings of the six conferences considered in this review. ADF, coming at the time of the Asian financial crisis, was viewed as very topical and was rated highest of all conferences for relevance. At MDF2, participants also felt that the conference addressed issues of importance at the conference, with opportunities for meaningful discussions.

Both conferences, according to the evaluation reports, appear to have been well organized and to have run smoothly. And while participants still said it was not enough, these two conferences provided relatively more opportunity for participation and interaction than at the other conferences. Both quantitative ratings and comments in interviews suggest that this is an important factor — if not the key factor as to how sessions were viewed. The importance of providing for active participation among conference delegates is discussed in the first section of the following chapter.

At all the conferences, participants were most positive about those sessions which did not follow a traditional lecture format and which provided opportunities for discussion and dialogue. It appears that a key factor to the generally most positive ratings for MDF2 and ADF is the relatively greater, even if still insufficient, amount of opportunities for participation and interaction at these conferences.

Chapter 3
Conference Approach and Organization

The Importance of Interaction and Participation

The overwhelming view among participants at *all* the conferences was that there were too many talking heads and one-way presentations. The most persistent complaint of participants at *all* the conferences was the lack of opportunity for more participation and interaction. At *all* conferences, sessions with the most opportunity for participation received higher ratings than those using lecture formats. As the MDF2 evaluation report (p. 36), for example, observed: "Workshop agendas were crammed with an excessive number of speakers, panelists and chairpersons — a case of 'speaker congestion'. This is not a new phenomenon." *This was a consistent feature of all six conferences.*

Even when the agenda provided an opportunity for participation, speakers in workshops and in plenaries regularly ran over. Sessions frequently ran beyond their allocated time, cutting into other events and limiting opportunities for interaction and networking during the "free" time between sessions. Participants at all the conferences felt that moderators could not or would not control their sessions. They resented the excessive use of a student-teacher pedagogical style, instead of a more participatory approach recognizing their own knowledge and expertise.

Lack of opportunity for participant interaction, and excessive use of one-way presentations, represents the most important, and the most consistent, finding, from the evaluations of all the conferences. As the evaluation of MDF2 (p. 36) *stated: "The World Bank — and especially its external training arm, the World Bank Institute — needs to hear this message."*

Smaller gatherings may make it easier to provide opportunities for participants to be more fully engaged. But the evaluations indicated that while there was insufficient opportunity for participation at large conferences such as GK'97 with over 1,700 participants, the same problem was also evident even at small conferences such as GCA (with just over 300 participants) and at SA2000 (about 100 participants).

The following quote from the ADF evaluation report (p. 57) is consistent with findings from all the other conferences as well:
"Presentation style often seemed too academic and classroom-oriented, and to squeeze out discussion time. Ratings were highest for workshops in which participants had ample time to discuss ideas, and to engage in practical and/or interactive endeavors that brought them together as a group. Ratings were lowest for workshops in which the lecture mode dominated, with participants sitting in rows and finding little opportunity to engage interactively with each other or the ideas presented."

Excessive application of a top-down, talking heads approach is inconsistent with the purpose, objectives and other intended aspects of the conferences, limiting the potential for greater impact. It limited what participants got out of the conferences, and thus did not make for the best possible conference experience from a customer service perspective. It limited opportunities for exchange, debate and dialogue among participants — one of the major goals of all the conferences. *Indeed, one might say that the unique opportunity presented by a conference venue is the opportunity for interaction with others. Whatever the intent, opportunity for participant interaction in practice was given a much lower priority than one-way provision of information.*

Lack of opportunity for greater participation also limited the ability to draw upon the expertise and perspective of the participants in understanding the reasons for the various difficulties facing their region and in identifying potential solutions. Given the high level of the largely hand-picked participants, this represents a major missed opportunity, and limited the conferences in achieving their objectives of arising at a consensus on needed action steps and policy approaches.

Lack of more opportunities for dialogue and discussion represents a major missed opportunity to capitalize on the high-level expertise and perspective of many of the participants.

Over-reliance on formal presentations and lack of sufficient opportunities for participation could be partly a result of the inappropriate application of a training model to conferences. Indeed, this represents application of an outdated model of training, generally inconsistent with adult education principles.[11]

The potential for change

How likely is it that future conferences will respond to the need for more opportunity for participation and interaction, as identified in this report, as well as in all six previous conference evaluation reports? On the positive side, the task managers and operational contacts all agreed in principle that this is important. It is disturbing, however, that four of the ten task managers and operational contacts who addressed this issue said that they thought that their conference *did* provide for considerable interaction. They seemed surprised when told that the evidence from the evaluation was that the participants felt otherwise.

A number of other barriers and practical difficulties also were identified through the interviews.

Getting the balance right

While participation is important, the interviews and evaluations indicated that there was also interest in having prominent people speak in plenaries and in smaller sessions. A number of contacts said that determining the correct balance between formal presentations and informal interaction is not easy. Nevertheless, it is possible to structure presentations, in both plenary and workshops, so that they can facilitate constructive and rich discussion and participation. For this to happen, however, exchange and discussion need to be built in as an integral part of the process, viewed and treated as at least as important as the formal presentations.

Demands for plenary spots

Some of the task managers pointed out that the politics of co-sponsored international gatherings can be complex, necessitating tradeoffs. For example, they indicated that some partners and other organizations made their participation contingent on giving their leader an opportunity to address a plenary session. But under what circumstances is this tradeoff worth it when it can jeopardize the overall success of a conference? Can there be other ways of providing exposure for high-level personages?

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[11]While it goes beyond the specific terms of reference of this report, some of those interviewed indicated that in many other WBI learning events, there also is insufficient understanding or application of adult education principles, and that while many presenters may have high-level content expertise, they frequently are lacking in presentation skills. The end result is a "content driven" approach in contrast to a "learner driven" approach.

Difficulties in controlling sessions

Some of the task managers observed that it can be very difficult for moderators to control their sessions and to keep speakers and sessions on time. Speakers have gone on, even where there have been meetings in advance and when moderators have attempted to indicate that their time was up.

This situation appears to be a result of lack of discipline, as well as lack of presentation skills. Moderators appear to be selected for their content expertise, rather than for their skill in moderation. There appears to be the need for some practical guidelines in this area. Guidelines along these lines are being developed as part of the MDF3 planning process. In addition, it would appear appropriate in the future to select moderators based upon their facilitation skills and/or to provide training in this regard. Another option would be to have someone else, possibly even a student aide, to act as an impartial timekeeper, using buzzers or other means to clearly indicate when a speaker's time is up.

> *Moderators frequently do not appear to know how to control their sessions. There appears a need to select moderators for their moderation as well as content skills, to provide specific guidelines, and perhaps the assistance of a neutral timekeeper.*

Attitudinal barriers

The task managers generally suggested that while they personally support increased participation, other more traditional minded people, within the Bank and elsewhere, would resist this. For example, two people said that some others feel that they know what is needed and feel that lectures are essential to pass this information on to others. Another task manager said that many of those on conference planning committees view any unscheduled time as a waste, and even resent time given to coffee breaks. Similarly, another comment was that one cannot impose a pedagogical style on presenters, that presenters should be able to use the approach with which they are most comfortable.

This attitude suggests a lack of concern for the pedagogical style that would be most appropriate for the participants, and limited awareness of adult education principles. It indicates a lack of appreciation that effective presenters need to have skills in presentation as well as in content. In order to provide for a good experience for conference participants and to facilitate achievement of conference objectives, presenters need to be selected for their presentation skills as much as for their content expertise. In addition, there may be an opportunity for WBI to take advantage of what it has learned about what makes for effective presentations, and to pass this information on to others — within the Bank as well as elsewhere. For example, WBI might consider offering information, for example in the form of courses, written materials, audio-visual or Web-based instruction, about how to make effective presentations.

> *There is a major need — and opportunity, for the WBI to provide guidance in written form, courses, and/or through other means, about how to give effective presentations. Presenters need to be selected for their presentation skills as much as for their content expertise.*

Delegation of authority for conferences can lead to loss of control

With the Bank moving to delegate much of the authority for conference planning to others, two people have questioned if the Bank can then still impose a presentation style. But while planning for MDF3 is working within a devolved model, the Bank representatives and others involved in planning the conference have explicitly focused on lessons learned from past MDF evaluations. The planning committee, for example, is preparing specific guidelines for

how sessions should be organized and moderated. It would be worth monitoring the effectiveness of these guidelines. How to plan effective conferences appears to be an area where the Bank can pass on to others the knowledge it has acquired from the evaluations it has conducted of a number of its conferences.

For the above reasons, significant change does not appear likely unless the importance of participant interaction is clearly articulated as an objective and concrete procedures are developed. *Participation needs to be viewed as a primary objective, rather than as an add-on when time permits following the formal presentations.* In particular, there appears to be a need to develop and to test participatory models of conference sessions as al-

> *There appears to be a need to develop and to test participatory models of presentations and of conferences, as alternatives to the traditional classroom format.*

ternatives to the traditional lecture, classroom format with speakers in the front of the room and the participants lined up in rows. There is considerable literature about what makes for effective presentations and for effective adult education that WBI could draw upon to improve the effectiveness of its own events and to pass on to others.

"Less is More"

A key finding from the evaluations of all six conferences is that, perhaps paradoxically, trying to squeeze in too much into a conference can result in less impact than through a more focused approach. As suggested in the preceding sections, conferences are more likely to be effective when the agenda is not completely packed with formal sessions filling up all the time, and when there is "free" time for participants to interact with one another.

> *As one of the senior operational staff put it, there is a danger of conference planning getting out of hand, with too many topics, too many events, and too many participants. He said that one must be careful to set priorities, to limit topics to the pressing issues, and to restrict attendance to the right people.*

Similarly, a major theme in the evaluations of *all* these conferences was that they were trying to cover too many topics and themes superficially, with too many speakers per session. For example, the GCA Evaluation Report (p. 26) stated that: "Many respondents said that there was not enough in-depth discussion of the issues." The SA2000 Evaluation Report (p.21) said that: "Since quite a number of eminent participants were present, greater opportunity should have been provided for in-depth group discussion . . . to take advantage of the expertise present."

The task managers and operational contacts suggested that there seems to be an optimal size for a conference. No one could put a specific number on how many participants is the ideal size. They said that it needs to be large enough to provide for a diversity of views and sectors, to have the right mix of experts, and to create the appearance of a large event. But there was agreement that in general: "the smaller the better." *Having too many people present can impede the principal conference task of engaging high-level participants in consideration of issues and identification of future policy directions and strategies.*[12]

> *There was general agreement that GK'97, with over 1700 participants, was too big, resulting in logistical difficulties and otherwise making impossible the type of involvement which could have happened at a smaller gathering.*

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[12] See Chapter 4 for further discussion of this issue.

Logistics are Important

Evidence from the conference evaluations, in particular qualitative comments to open-ended questions and in interviews, emphasized the importance of logistics. Good logistics can set the stage for a good conference; they can help create an atmosphere which can place participants in the right frame of mind and which can maximize opportunities for inter-action. Conversely, poor logistics inhibited conference potential, giving the wrong signals to participants. In addition, how conferences were organized, and how the inevitable difficulties were dealt with, reflected positively — or negatively — on the Bank itself.

As previously discussed, there was a negative impact when conferences did not stick to their schedule and when participation was inhibited. Evidence from conference evaluations suggested that other logistical matters, including travel, accommodations, room assignments, adequacy of technology, refreshments, and a host of other variables can help make or break a conference. Not surprisingly, logistical arrangements tended to go more smoothly at the smaller conferences — perhaps another reason why conferences should be kept as small as possible. It is probably no coincidence that at ADF and MDF2, the conferences with the highest satisfaction ratings from participants, things ran smoothly.

It should be recognized that large-scale conferences such as these six need considerable effort and time to plan. Planning of many other conferences on the scale and size of the Bank conferences sometimes starts years in advance. Many of the severe logistical problems associated with GK'97, for example, might have been avoided with more lead time.

Another logistical issue (as well as, perhaps, a programming consideration) concerns the information given to participants in advance of the conference. A common complaint of participants is that they did not have all the information they needed in advance. For example, GK'97 program summaries, including registration information, were mailed so late that a substantial number of participants arrived without it, with many unaware until arrival which hotel they were booked in. Participants at the workshops at SA2000 only received reading materials the night before. The evaluation of this conference noted that distributing binders in advance is not feasible, due to time and cost considerations, but suggested that: "It should be possible before a seminar such as this to send executive summaries of all the papers, via e-mail or fax." (p. 27)

> *Participants at GK'97 and GCA commented on the irony that at these conferences which were devoted to technology, there were a variety of technological difficulties and restrictions and the participant lists did not provide E-mail addresses.*

Chapter 4
Strategic Considerations

Importance of a Strategic Approach to Conference Planning

The evaluators indicated, through a group discussion as well as in evaluation reports, that while task managers, retrospectively, could describe the purpose of the conference, it is unclear to what extent this had been thought through beforehand or had guided the conference planning. The evaluators said that formal statements of conference goals and objectives tended to be general in nature, and that they were too vague to provide sufficient direction to conference planning or to serve as a basis for conference evaluation.

As the evaluators indicated, when the purpose or intended outcomes of a conference is fuzzy, this can lead to fuzzy planning — and in turn to less impact and follow-up than would occur otherwise. There is some evidence of this with these six conferences. For example, Chapter 2 indicated that all conferences were supposed to result in action afterwards. Action, however, is much less likely to follow without clear and precise objectives. Furthermore, several of those interviewed emphasized the need to build in specific plans for follow-up in advance, as part of the conference process, indicating that otherwise it is less likely to happen. More openness about how the Bank itself was expected to be influenced by the conferences could also have led to increased communication about conference findings and implications.

There appears to be a limited strategic focus in the planning of most of these conferences. Such an approach involves starting by identifying overall strategic priorities, and then determining how a conference could contribute to these and what else needs to happen. The value and impact of conferences can be magnified greatly beyond simply what happens during their two or three-day period when they are viewed not as one-off events but as one component of a larger strategy, such as moving the Bank's strategy for a region in a particular direction. For example, the MDF conferences were never intended as stand-alone events, but embedded as part of the Bank's strategy in the MENA region. Plans for follow-up were included from the beginning. This strategic approach probably is responsible for the amount and quality of the various follow-up activities following MDF1 and MDF2.

> *The MDF conferences were never intended as stand-alone events. They were planned as one component of the Bank's strategy in the MENA region. This strategic approach probably is one of the major factors responsible for the high level of activity that has followed the two MDF conferences.*

In contrast, while follow-up action was an objective for the other conferences as well, what actually occurred appears to be much more limited. Other conferences did not appear to have articulated plans for follow-up in advance. If dealt with as an afterthought, action appears to be much less likely. While MDF is frequently cited as a potential model for other regions, there does not always appear to be a realization that the MDF conferences have been approached as one instrument of a broader strategy, rather than as ends in themselves.

> *Conferences should be planned and viewed as one component of a broader strategic approach that includes specific plans for follow-up action.*

As the MDF2 evaluation report (p. 5) points out, conferences "can be seen as one link in a desired 'results chain' which it is hoped will lead to the [Bank's] ultimate goal of poverty alleviation. . . [Nevertheless] it is simply infeasible to expect that a single 3-4 day conference would have any measurable impact on poverty."

It is, however, possible to delineate the intended ways in which a conference can interact with other factors to lead to intermediate and longer-term outcomes. A program logic model (or LogFrame) is a tool that graphically identifies expected potential short, medium and long range outcomes as well as the links between these and the project activities. It can be a very useful tool to aid in conference planning and evaluation. In particular, when developed at an early stage, it can help identify if the objectives, and planned activities and conference components are consistent, if expected outcomes have been identified, and if they are likely to occur.

An important consideration related to the ultimate impact of a conference (or of any other activity) is an accurate initial assessment of needs. Based upon interviews with the evaluators and task managers, it appears that the determination of needs and priorities for the conferences have been mainly informal in nature. Both conference content issues, as well as the conference or presentation design, appear to have been determined largely by a small group of people within the Bank, frequently in conjunction with their counterparts in partnership organizations.

To be sure, a formal needs assessment may be difficult to carry out, given the nature of the target audience, tight time constraints as well as for other reasons. Nevertheless, there appears to be some opportunity, at the very least, to check out the proposed conference design with a range of potential participants and target audiences. The current approach can make it appear that a group of Bank "experts" has pre-determined what others need to learn and to do. Getting buy-in from others in advance, through participation or at least endorsement of the proposed content and process for the conference, can help increase commitment and the potential for future action.

As Chapter 2 indicated, the six conferences considered in this report generally received high ratings for relevance, suggesting the appropriateness of the overall conference *raison d'être.* Nevertheless, they received a more mixed response regarding some of the particular conference components. Furthermore, Chapter 3 indicated that in all cases, the conference *format and process*, with excessive emphasis on a top-down rather than participatory approach, was neither most suitable for the participants nor for the overall conference objectives.

While it is important to specify conference objectives in advance in order to guide planning, it is also important to remain responsive and flexible. For example, initial objectives for MDF1 were vague. But this conference, in a sense, served as a needs assessment which led to greater specificity for MDF2, as well as for other Bank activities in the region. ADF was initially planned before the onset of Asian financial crisis. When the crisis emerged, the conference purpose and agenda were refocused in order to explore the causes of the crisis and to identify appropriate responses.

> *The need for the GCA conference appears to have been identified by the Bank, in response to representations of private sector providers of telecommunications. It is not clear, however, to what extent this was a priority area to African governments, or to what extent government regulatory agencies were consulted in the design of the conference. Lack of follow-up after the conference may be an indicator that this was not a pressing need at the time.*

Such a flexible and adaptable process is consistent with current management thinking[13] that has documented the importance of a responsive and emergent approach to strategy.

Conferences are Not the Same as Training Events

Training of the participants is noticeable by its absence in the discussion of conference objectives and benefits in Chapter 2. When asked about the purposes of the conferences, training was not mentioned spontaneously by *any* of the task managers or the operational contacts. When probed specifically to what extent training was an objective of the conference, a couple of individuals said "a little". The rest made it clear, often very adamantly, that this was *not* the purpose of the conference.

In this respect, conferences are qualitatively different from many of other events sponsored by the WBI. This has significant implications for all aspects involved in conferences, including: conference planning, selection of participants, conference design, follow-up, and evaluation.

Conferences, by their nature, can take on a life of their own which goes beyond their individual components. A paradox is that a mass of participants may be needed to help create an *event*, to help give a conference profile, to make it newsworthy and to attract attention. These features may be necessary in order for conferences to create the "big bang" effect that they generally are intended to do. Actual participants, as individuals, while critical to the success of a conference, are only the secondary focus.

The major purpose of the six conferences was to result in action of some form at the *institutional* level, such as new partnerships or working relationships, changes in policy, and other action steps. These conferences were primarily intended to influence institutions such as: governments and government agencies, regional and international organizations of various forms, other partner organizations, and the Bank itself. Many of the participants were representatives of these institutions, often with the potential to influence or even to create policy. But the primary focus of these conferences was at the *institutional* rather than at the *individual* level.

It is apparent, from numerous statements of the task managers, operational contacts and the evaluators, as well as from a scan of conference participant lists, that most regular conference attendees are in senior positions, with a great deal of knowledge and information. Indeed, conference participants generally were specifically identified and invited to attend based upon their expertise. The distinction frequently made in conference and evaluation reports, between "presenters/facilitators" on the one hand and "participants" on the other, seems artificial, given the high level of expertise of those who were invited to attend and the stated intention of the conferences to tap the expertise of all participants.

> *Conference participants, for the most part, are high level experts in their own right. They come to conferences to exchange ideas with colleagues rather than to be trained.*

Indeed, it may be more appropriate to view the primary role of participants as a source of expertise who collectively could identify strategies and ideas for action, rather than the other way around. This would be consistent with conference objectives such as providing for an exchange of views and the development of a consensus about potential solutions to large-scale prob-

> *It may be more appropriate to view participants as a source of knowledge and expertise to be tapped through conference exchanges, rather than as individuals who need to be provided with information.*

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[13] E.g. Henry Mintzberg. (1994). *The Rise and Fall of Strategic Plan*

lems and which types of high-level action are needed. (For example, a primary objective of ADF was to identify strategies to address the Asian financial crisis.) To make the most of the expertise of conference participants, however, would require some change to the way conferences have been designed in the past. As the following section discusses, the conferences, for the most part, consisted of formal presentations with insufficient time for dialogue involving participants.

To be sure, participants do come to conferences to learn. But there is an important distinction between learning and training. As one of the senior operational staff stated, it is important that conferences create an environment where people can be open and share knowledge among themselves — rather than the Bank passing on knowledge in a one-way flow. Other contacts indicated that delegates come to conferences for a collegial exchange of information and ideas, for an opportunity to learn from the experiences of others, to pass on their own knowledge, and to debate the implications of their collective experience for the challenges the conferences were set up to address.

As discussed above, conference planners recognize that the primary objectives of the conferences were for reasons other than training. Nevertheless, perhaps through an insufficient strategic focus and possible lack of awareness of alternative models, these conferences, to a greater or lesser extent, were still organized around a training model, for example with sessions largely consisting of one-way lectures or presentations crammed one after another. As the evaluations indicate, participants felt that this approach was inappropriate. Use of a training perspective is one of the most important factors limiting greater impact of these conferences. It represents a missed opportunity to take more advantage of the high level of expertise and perspective of conference participants.

> *Conference designs should provide for more opportunities to take advantage of the high-level expertise and perspective represented by conference participants, for example through greater use of an interactive model.*

Conference Cost Effectiveness

The terms of reference for this study included consideration of the cost effectiveness of the six conferences. Unfortunately, it was not possible to address this question directly, as detailed information about expenditures was not available. While the WBI cost database apparently maintains data about conference costs, this was not accessible for the purposes of this study. The evaluators indicated that costs may be recorded by different conferences in different ways, making comparability difficult. While all task managers were asked for information about the conference costs, all that was readily available was verbal statements of approximate expenditures by each major partner, and in one case by major expense category. In one case, the above summary information was available in written form.

> *The costs of all conferences were shared with other partners, who paid a significant portion of the expenses, sometimes even more than the WBI contribution.*

Some interesting findings and challenges about expenditures on conferences did emerge, however. For example, there is no simple indicator of the "cost" of a conference. All of the conferences were carried out in partnership with other institutions who contributed significantly to the cost, sometimes apparently even more than the Bank itself. In some cases, other arms of the Bank, as well as WBI, contributed significantly. Furthermore, there was no mention of the full costs of conferences in the interviews nor in the available documentation. For example, there can be considerable in-kind costs (e.g. staff time) of the WBI

as well as other sponsors, as well as expenses which may be included in other budget lines (e.g. travel, preparation of publications). Such costs can be considerable, and likely vary from conference to conference, making comparability of conference expenditures difficult or impossible without more information. Participants attending conferences and their employers or sponsoring organizations also bear significant out-of-pocket costs, e.g. for conference registration, travel and accommodation, as well as the value of staff time.

The other challenge in considering the cost effectiveness of conferences is defining conference outcomes. The major impacts of conferences, by definition, tend to be qualitative and long-term in nature, and difficult to specify.

Cost per participant (or per participant day) represents a measure of input or process rather than of outcome and generally is not a meaningful measure of conference value. As Chapter 3 discussed, conferences are likely to have the greater impact when they are highly focused on a small group of key participants, with adequate time for in-depth discussion in order to be able to reach consensus about the needed next steps. A conference with such a strategic focus could have a higher cost per participant than that of a conference with large numbers and minimal impact — even though the absolute cost could be less and its value considerably greater.

> *Cost per participant is not a meaningful indicator of the value or cost effectiveness of a conference and should not be used for this purpose.*

Conferences also differ in whom they count as a "participant". There does not appear to be any consistency in this regard. For example, SA2000 distinguished between "participants" and "observers". ADF distinguished between "presenters/facilitators" and "participants". In other conferences, journalists sometimes were considered as participants, and sometimes not.

Thus if cost per participant were used as an indicator of performance, there is a danger that it would lead to larger numbers of participants than are appropriate — and to increased overall conference costs, as well as to selective counting of "participants". As one person pointed out, if conferences are judged on the basis of how many bodies are in attendance, one "can just give away tickets."

Defining and examining conference costs, and arriving at more appropriate indicators to use in assessing the appropriateness and cost effectiveness of expenditures, seems to be an area warranting further attention. Comparable information about costs for various components of a conference could be of assistance in budgeting for future conferences.

Conferences Can Support the Bank's Movement towards Capacity Building

A number of those interviewed emphasized that the Bank is moving from a country to a regional approach and wishes to involve regional Thinktanks and other organizations in this process. Rather than acting as the source of expertise on all issues, the Bank wishes to use its resources to help develop the expertise of others, to shift from a "retail" to a "wholesale" approach. This new direction implies a "letting go", with delegation of responsibility and control to others.

Conferences have the potential to be a major support for this direction. Conversely, they can give the opposite message, depending upon how they are handled. One of the major lessons learned from these conferences is the importance of process. In particular, the best way to develop the capacity of others is to delegate authority to them, while providing support, guidelines and tools. In this way, learning happens through doing — rather than through telling others what they should be doing.

One key step in the development of an exit strategy is the active involvement of partners in the planning and coordination of conferences, where partners have authority for decision making about some or all aspects of the conference. All conferences have involved partners in conference planning. MDF3 has gone beyond this, where the Bank has given the lead to planning and coordination of the conference to others.

A major objective of all the conferences was to facilitate greater partnerships. Working together on the conference planning and implementation, with the sharing of responsibility and decision making, can be an important step in this process.

When this topic was discussed, those interviewed indicated that the Bank's role will need to change from a primary emphasis on doing to one of support and facilitation. They suggested that, as is happening in the planning for MDF3, there will be a need for more guidelines and tools regarding all aspects of conference organization for others to use. Other suggestions include the Bank sharing information about what it has learned from previous conferences, on an equal basis with partners. This could include internal reports as well as early versions of public documents, such as Back to Office documents, evaluation reports of previous conferences, and other materials that can facilitate effective conference planning.

The task managers and operational people who discussed the Bank's emphasis on capacity building indicated that it is not necessarily easy. For example, they indicated that assisting others involves considerable coordination and work. While there may be long-term benefits, in the short-term this could involve more time and effort than doing it alone. Also, the development of guidelines and practical tools for conference planning and the identification of lessons learned require considerable effort, without perhaps as much glory as would come from assuming the leadership role.

This discussion regarding the potential role of conferences in supporting capacity building reinforces the importance of approaching conferences from a strategic perspective, and not treating them as one-off events.

Disseminating and Acting Upon What Has Been Learned at Conferences

What happens with what has been learned during a conference? For two or three day events involving a limited number of people, conferences are major and expensive undertakings. Their value can be greatly enhanced if the findings and implications emerging from the conference are passed on to others.

There does not appear to be a consistent approach to this. As indicated earlier, publications presenting highlights of the two MDF conferences were prepared, but these appear to be exceptional.

There appears to be a need for dissemination of conference findings, even within the Bank itself. For example, all but one of the operational staff interviewed appeared not to be aware of the spinoffs of the conference they were actively involved in planning, let alone what was learned from other conferences. The task managers did not appear to be familiar with what had taken place, and in particular what worked well and what not, at previous conferences.

Communications could take a variety of forms, including: summaries or edited proceedings, newsletters, fact sheets, press releases, videos, academic papers, as well as communications in other media. Communications could go to conference participants, encouraging them to act upon the findings from the conference, as well as to others. For this to happen, however, there is a need for a dual strategy:

> *Conferences frequently are expected to address important questions, with implications for others in addition to the conference sponsors and participants. ADF, for example, set out to explore the causes of the financial crisis as well as strategies to reduce its impact and duration. Similarly, SA2000 set out to identify policy approaches to enhance rapid economic growth and social advancement in South Asia. It is unclear if answers to these and related questions have been identified and communicated to others.*

1.   Identification of what has been learned and implications for action arising from the conference, both from formal presentations and through an analysis of the contributions of the participants and any emerging consensus; and

2.   Development and implementation of an appropriate dissemination strategy.

In addition to the need to identify and to pass on what has been learned and implications about the concrete issues a conference was set up to address, there also is a need to identify implications for the planning and management of future conferences. For example, as suggested in Chapter 3, there appears to be a need for conference planning tools, such as guidelines and checklists with respect to various aspects of the conference process. This is becoming especially important as the Bank moves to divest authority to partners for planning and implementation of conferences. Given the Bank's extensive experience in organizing conferences, there is considerable "hard" and "soft" information that could be invaluable to others.

This could be done in conjunction with conference evaluations.[14] However, this study found that just one of the operational contacts was aware of the conference evaluation, and task managers did not consider the implications and recommendations of previous conference evaluations when planning their own conference.[15] A separate paper suggests ways in which the relevance of future conference evaluations can be enhanced and strategies for increasing the likelihood of actual use of evaluation findings and implications.[16]

> *Task and operational staff involved in planning GCA indicated that they did not review the evaluation report of GK'97, even though the GCA conference was intended in part as a follow-up to that conference. Perhaps as a result, the evaluation for GCA indicated that this latter conference repeated a number of the problems which had been identified at GK'97.*

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[14]This report represents one example of doing just this.

[15] The exception is MDF, where the evaluation of MDF1 was considered in planning MDF2, and where the evaluation report of MDF2 is being considered in planning the forthcoming MDF3.

[16] See note 10.

MDF as a Best Practice Example

The MDF approach in the MENA region, as it has evolved from the first MDF1 conference to the forthcoming MDF3 one, reflects a strategic approach with an increasing emphasis on capacity building. As the MDF2 evaluation report (p. 35) stated:

"Conference activities and initiatives should be viewed as part of an ongoing process of regional involvement and dialogue — one which includes the regional partners and the Bank as key players. In other words, the conference should not be viewed as a stand-alone activity but as part of an ongoing collaborative process."

Partners involved in the planning of MDF3 have authority for developing the program and for coordinating the conference. Bank staff have assisted in the development of various guidelines and tools, and have shared information about previous conferences. For example, the evaluation of MDF2 has been posted to the conference Web site.

There are numerous other best practice aspects of the MDF process. For example, the staff involved, starting with MDF1, have demonstrated an interest in learning from their experiences. MDF1 was labeled a pilot initiative. Strengths and weaknesses of this conference were used to result in significant improvements in MDF2. In turn, evaluation findings from that conference are being acted upon in the planning of MDF3.

Chapter 5

Conclusion and Recommendations

Conferences sponsored by the Bank are high profile events, with the potential to stimulate significant follow-up action — by governments, regional and other institutions, and by the Bank itself. In this respect, they are quite different from training events.

The six conferences evaluated in this report and sponsored by the Bank had ambitious objectives. They were set up to provide for exchange, debate and dialogue among high-level participants from a range of sectors about the challenges facing a region and to build at least some degree of consensus about potential solutions. All conferences hoped to result in new and enhanced partnerships and working relationships, to create awareness about the need for action on pressing issues, and to influence the policy direction of countries and their agencies, regional institutions and others. *All conferences were expected to result in follow-up action of some form.* A major, although unwritten, objective of all conferences was to influence future policy directions and working relationships within the Bank itself, and to help bring the Bank more in touch with the region.

All conferences succeeded in attracting high-level participants. To a greater or lesser extent, they have succeeded in creating greater awareness and understanding, and the development of new or enhanced partnerships and working relationships. Participants had mixed views about the conferences and their components. However, all conferences received high ratings for relevance and generally positive ratings for overall effectiveness. MDF2 and ADF received the highest ratings. It is unclear, however, if the conferences have influenced policy directions or resulted in other outcomes following the conference. The exceptions are the two MDF conferences. The evaluation reports for these conferences, as well as interviews with Bank staff and documentation, indicated that these conferences led to a number of subsequent activities that have contributed to the policy debate, as well as some tangible outcomes, in the MENA region.

This review, however, identified a number of consistent themes about the strengths and limitations of these conferences, with implications for how the impact of future conferences could be maximized. These are briefly summarized below.

Importance of a Strategic Approach

Conferences are expensive undertakings for events that last just a few days. Their impact can be greatly magnified when they are viewed not as one-off events but as one component of a larger strategy. Generally those conferences which took a strategic approach and built in specific plans for follow-up as part of the initial planning process appeared to be the most successful. *All aspects of conference planning, management and evaluation need to focus on intended outcomes following the end of the conference.*

Need for a Participatory Conference Model

The most persistent complaint of participants at all the conferences was the lack of opportunity for more participation and interaction. At all conferences, sessions with the most opportunity for participation received higher ratings than those using lecture formats. *Lack of opportunity for participant interaction, and excessive use of one-way presentations, repre-*

sents the most important, and the most consistent, finding, from the evaluations of **all** the conferences. As the evaluation of MDF2 stated: *"The World Bank — and especially its external training arm, the World Bank Institute — needs to hear this message."*

While there is increasing awareness of the need to provide for more participation at future conferences, this does not appear likely to happen unless the primacy of participant interaction is clearly articulated as an objective and concrete procedures are developed. In particular, there is a need to consider alternative conference designs that provide for participation and interaction as a key design feature rather than as an add-on when time permits. There is a major need for guidelines, directions, and possibly training to moderators to enable them to better control their sessions. The MDF3 conference planning committee is developing guidelines along these lines. It would be worth monitoring how well they work when this conference takes place.

Similarly, it should be recognized that conference participants, for the most part, are experts in their own right who attend for a collegial exchange of views rather than to be trained. *In this respect, conferences are qualitatively different from many other events sponsored by the WBI.* Use of a training model in conference sessions, rather than an approach emphasizing learning and sharing, frustrated participants, limited the potential to drawn upon their extensive knowledge and expertise, and was a key factor limiting greater conference impact.

"Less is More"

A key finding from the evaluations of all six conferences is that, perhaps paradoxically, trying to squeeze too much into a conference can result in less impact than using a more focused approach. Conferences are more likely to be effective when the agenda is not completely packed with formal sessions filling up all the time, and when there is "free" time for participants to interact with one another. Having too many people present can impede the principal conference task of engaging high-level participants in consideration of issues and identification of future policy directions and strategies. As a senior operational executive stated, one must be careful to set priorities, to limit topics to the pressing issues, and to restrict attendance to the right people. An important implication of this is that cost per participant is not a meaningful indicator to use in considering the cost-effectiveness of conferences, or in comparing conferences.

Potential for a More Systematic Approach to Act upon What Has Been Learned at Conferences

There does not appear to be a consistent approach to identifying conference findings and implications, nor to disseminating this information to others. This has limited the potential to capitalize on what has been learned at the conferences. It appears to be a key factor limiting follow-up action. There has been minimal use of previous conference evaluations when planning new conferences. As a result, many of the same difficulties and limitations keep on being repeated.

MDF as a Best Practice Example

The MDF conferences have always been embedded in the Bank's strategy for the MENA region. They were never intended to represent stand-alone events. In addition, planning for

MDF2 took into account what was learned from the experiences and evaluation of MDF1. Similarly, planning for the forthcoming MDF3 is taking into account what has been learned from the previous conferences. There is much that can be learned from the MDF process for future conferences.

Annex 1
List of Bank Staff Interviewed

Conference Task Managers

- Ishac Diwan (MDF1)

- Mansoor Dailami (SA2000)

- Haleh Bridi (MDF2)

- Kerry McNamara (GCA, GK'97)

- Anuja Adhar (GCA)

- Farrukh Iqbal (ADF)

- Paud Murphy (GK'97)

Operational Contacts

- Paul Bermingham (GCA)

- Michael Potashnik (GK'97)

- Ghassan El-Rifai (MDF1, MDF2)

- John Williamson (SA2000)

- Amar Bhattacharya[17] (ADF)

WBI Evaluators[18]

- Padma Karunaratne (SA2000)

- Mark Bardini (GCA)

- Janet Billson (GK'97, ADF)[19]

- Ray Rist (Head, Evaluation Unit)

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[17]Telephone interview.
[18] One of the authors of this report, Keith Mackay, was also the WBI evaluator of MDF1 and MDF2.
[19]External consultant, interviewed through E-mail exchange.

Annex 2

Evaluation Design Matrix

Evaluation question	Information required	Information sources	Data analysis methods	Limitations	What the analysis lets us say
1. what were the absolute and relative satisfaction levels of participants in the 6 conferences?	participant reactions overall, and to seminar content, presenters, material, facilities	results to participant questionnaires, as reported in the 6 conference evaluation reports	(i) respondent ratings and (ii) qualitative responses – contained in the 6 reports	(i) possible response rate bias; (ii) limitations to the comparability/ usefulness of questions asked at the various conferences	measures of respondent satisfaction with each conference
2. targeting effectiveness – did the right people attend?	sector and country of residence of participants	registration data reported in the 6 reports	descriptive analysis	different conferences may have applied different approaches to classifying participants	extent to which the target groups attended the conferences
3. extent of learning from the conferences?	before and after measures of participant knowledge of conference content	varied: for some conferences, participants were asked to indicate their perceived learning gain; for others, the question on learning was more impressionistic	pre-post comparisons contained in the 6 evaluation reports	(i) possible response rate bias; (ii) measures of cognitive testing are sensitive to the number and difficulty of questions asked; (iii) level of knowledge at end of conference might not be maintained at a later date; (iv) knowledge learned might not be relevant to participants' jobs; (v) not all conferences were concerned with learning per se	extent to which respondents' knowledge of a range of technical issues/topics has been increased as a result of the conference
4. what impact did the conferences have?	in-country measures of impact	interviews of Bank task managers, and of operational/network senior staff	content analysis	(i) lack of hard data on in-country impacts; (ii) reliance on impressionistic/ qualitative views	extent to which Bank staff consider each conference to have had an effect

Evaluation question	Information required	Information sources	Data analysis methods	Limitations	What the analysis lets us say
5. what was the relative cost per participant (or per participant-day) for the conferences?	conference cost data	the 6 reports plus EDI's cost database	calculation of totals, means	quality of cost data and extent of comparability across the 6 conferences is uncertain	estimated total and mean costs of the conferences
6. was it appropriate for the Bank to sponsor each of the conferences?	extent of alignment between conference objectives and the Bank's global/ regional objectives/ priorities	(i) interviews of Bank operational/network staff; (ii) Bank documents on objectives of the conferences, and of global/ regional priorities	content analysis	qualitative views; vagueness in some of the stated conference and Bank global/regional objectives	extent to which conference objectives appear to align with Bank priorities
7. how can such conferences be improved in future?	(i) levels of participant satisfaction with different features of each conference; (ii) participant suggestions; (ii) task manager and partner comments and suggestions	information from the 6 reports on the following: (i) conference questionnaires – ratings plus qualitative responses; (ii) evidence from informal interviews of participants; (iii) some formal interviews of task managers and partners are available	content analyses contained in the 6 reports—especially a comparison of the conference features which did/did not work well (e.g., long vs. short workshops; lecture approach vs. group discussion and/or adult learning; plenary sessions vs. workshops; total # of participants—i.e., large vs. small workshops/ conferences)	uncertain	identification of good/best practice; suggestions for improvement
8. how can future evaluations of such conferences be improved in the future?	descriptions of evaluation methodology and of problems encountered in the 6 evaluations	the six evaluation reports	comparison with evaluation best practices	the challenges encountered in an international and multi-cultural context can be difficult to anticipate and correct	identification of good/best practices and suggestions for improvement