REGIONAL ECONOMY ORIENTED STRATEGIES FOR LIFELONG LEARNING

Methods paper in the scope of WiSaR project

Delphi

Panel

Round **T**able

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1. Introduction

Within the WiSaR project, the Delphi, Panel und Round Table methods were tested comprehensively with regard to their significance for the topic of “lifelong learning”. While Round Table and Panel Discussion are classical qualitative methods, Delphi is a quantative prediction instrument which is predominantly applied in “futurology” and technology studies. In the course of the pilot study any one of the three methods served to strengthen the formulated assumptions/theses/hypotheses.

However, it is important to note that the selection of the most adequate method depends on the situation at hand, i.e. on the research question, financial funds and available time. For example, a qualitative study may be suitable to supplement a Delphi study, if the aim is to gain more in-depth insights into a certain area (methodological triangulation).

Key differences between these methods are not only found in the quality of outcomes but also in the different approaches and competencies needed for preparing and implementing them. On the one hand there is the rather laborious development process of the Dephi method, which requires the repeated development of new designs and adequate evaluation procedures; on the other hand the Round Table method necessitates the application of specific moderation and interpretation techniques. Similarly, specific requirements must be met in order to implement Panel discussion. These preconditions must be considered before a method is chosen.

As „lifelong learning“ takes different shapes in the partner countries and region-specific factors had to be taken into consideration as well, each project partner focused on different aspects. Consequently, a clear picture emerged of which method is best suited to which research question. There will be more detailed information on this subject in the guidelines.

In the following, the materials used by all project partners will be described.

2. Round Table

2.1. The Concept and History of Roundtables

The concept of roundtables was developed by SZF and has been put into practice for three years together with industry partners. On the one hand, it is the aim of this roundtable to evaluate the quality of training opportunities and to identify the development potential in further education programs. On the other hand, the contributions made by the participants are expected to optimise the training courses to such an extent that entrepreneurs can fill their vacancies more rapidly and more efficiently with suitably skilled applicants. The program of these roundtables is divided into two sets of topics, the first part being dedicated to the debate on training at SZF and the second focusing on the future development of the company. The first part focuses on the question to which extent the professional and social competencies acquired at SZF (including work placement and job-application training) have helped trainees to meet job requirements. Former trainees at SZF, their immediate superiors and personnel managers are invited to share their relevant experience. The second set of topics concentrates on the future of the company. Focus is laid upon the requirements and tasks that will have to be fulfilled in the future with regard to human resources, materials and machinery. The Ishikawa Model serves as methodical guideline.

This is where the „WiSaR Roundtable“ comes into its own. The topics dealt with are the future labour market, the required competency profiles and the principle of lifelong learning. The roundtable as it is presented here was developed within the framework of the EU project WISAR and is an adaptation of the original FAC technique. Based on the experience and insights of classical roundtables, the demands the economy will place upon the educational system in the future are being discussed. This model is being implemented as a pilot project and evaluated at SZF. SZF's partner organizations also test topics related to LLL, either by means of panels or delphis, and assess both quality and feasibility of the respective methods. On the basis of the collected experience the 'WiSaR Roundtable" concept will once more be validated and/or modified at the end of the WISAR project.

2.2. Intention

Up to 75% of entrepreneurial success is achieved by knowledge advantage. At the same time fewer than 15% of enterprises are able to judge the „return to education“ of training measures. In light of this situation it seems to be necessary to cooperate with experts from the education sector and industry in order to develop competency profiles regarding future demands and future training programs, taking into consideration the national guidelines of LLL. Structured medium-term personnel development requires adequate training opportunities. It also has to be acknowledged that, among other objectives, a major goal of education is economic participation. It is a logical consequence of these facts that the two groups of stakeholders should join forces in order to keep closer watch on the demand situation, regulate the cycles of LLL in a more demand-oriented manner and advance joint developments. In other words, the roundtable is supposed to bring about a new quality of cooperation between entrepreneurs and educational institutions. On the one hand, the educational institutions can play the role of moderator and process facilitator; on the other hand they are in a position to give new impetus to fundamental studies and development projects.

2.3. Target Groups

- Representatives from industry who work at different hierarchical levels as well as personnel management employees, heads of department, skilled workers
- Representatives of VET institutions and adult education both in the formal and non-formal sectors
- Representatives of the National Employment Service and „social partnership“ organizations

2.4. Targets

1.) Extension of evaluation systems regarding LLL strategies and development of future competency profiles based on the following questions:

- How do graduates of vocational and/or adult education courses perform in their jobs regarding professional, personal and social competencies?
- Which competency profiles (professional, personal and social) will be in demand in the future, and what are the consequences for educational institutions?
- Which role do educational institutions play in economy-related skills improvement and „lifelong learning“, and what are the implications for their future self-concept?
- To which extent do enterprises acknowledge formal, informal and non-formal[1] training, and what importance do they attach to the relevant certificates?
- Which shortcomings can be identified in the formal, non-formal and informal educational sectors?
- Which role does industry play in the context of lifelong-learning strategies and their implementation?

2.) Raising awareness for an environment in which the principles of lifelong learning form an integral part of life and where both enterprises and educational institutions contribute to the process of lifelong learning

- Raising awareness within the companies for the fact that the demand for qualification and training needs to be defined accurately. To which extent do they acknowledge formal, informal and non-formal training, and what importance is attached to the relevant certificates?

[1] **Informal education** is related to life-long learning processes whereby individuals adopt attitudes and values, and acquire skills and knowledge by being exposed to influences and using resources in their own environment which form part of their daily experience (family, market, library, mass media, work, games etc.). **Formal education** relates to state education from primary schools to universities. This includes special programs for technical skills and vocational training and education. **Non-formal education** relates to any program outside the formal curriculum which provides personal enrichment and social education for people and is designed to improve certain skills and competencies. In: http://www.kompass.humanrights.ch/cms/front_content.php?idcat=1539

- Raising awareness for joint projects in companies and educational institutions

- Raising awareness of the fact that further education offered to employees is an investment in the future
- Drawing attention to cooperation between educational institutions and industry and creating the infrastructure for sustainable cooperation
- Raising awareness within the companies regarding industrial placements and similar external work experience for trainees
- Drawing attention to further education and training requirements employees of „advanced age“ may have
- Raising awareness within the companies for regional demographical trends with regard to the impending lack of skilled workers

2.5. Description of the „WiSaR Roundtable“ and the Ishikawa Method

Roundtables are instruments which provide a platform for debate on the topic of „human resources – advancement of qualification – lifelong learning“ and the discussion of measures related to education and employment.

In this context the idea is to make causal analyses and develop solution scenarios which form the basis for a sustainable development of LLL. The exchange of know-how between educators and people in business helps to identify new creative potential with regard to lifelong learning, which may be used to act beyond the limits of existing programs, to supplement these programs or to open up new ways. For this purpose the Ishikawa[2] Method – also called „Cause-and-Effect Diagram“ – is applied. This diagram is the graphical representation of causes which have either led to an event or, at least, had a considerable influence on it. By means of this diagram the causes of events can be identified and dependencies can be depicted (Schulte-Zurhausen, M. (2002), p. 513). The idea is that by collecting group knowledge all influencing factors the team can conceive can be covered. The Ishikawa-Diagram

2 The Cause-and-Effect Diagram was developed by the Japanese scientist Kaoru Ishikawa at the beginning of the 1940s and named after him later. Initially this technique was used in quality management for the analysis of quality problems (origin: Fishbone approach) and their causes.

collects the „expert knowledge“ of the participants by means of a special form of brainstorming. It provides a “snap shot” of collective knowledge and, ideally, it helps to reach consensus on the causes of a certain condition.

On a critical note, it must be pointed out that the results of an Ishikawa Diagram do not necessarily identify the actual root causes of a situation, as they represent the assumptions made by the participants. Statistically the assumption that the identified cause is a root cause can be supported by a significance test (hypothesis test).

2.6. Drawing a Cause-and-Effect Diagram and Charting the Main Influencing Variables

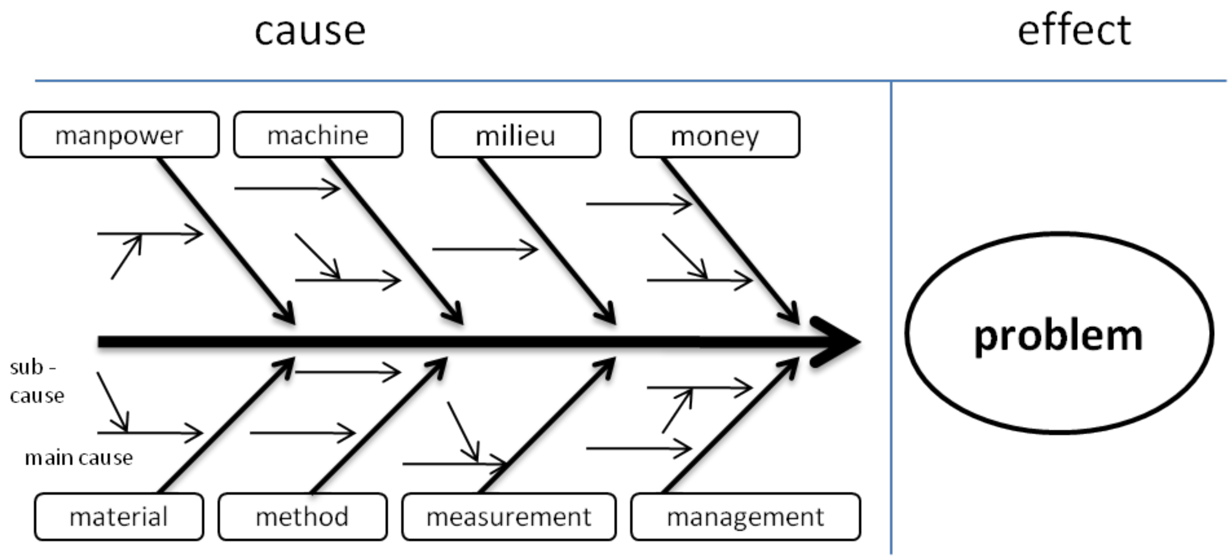
The starting point is a horizontal arrow pointing to the right, i.e. to a problem/condition written down at its tip. This problem/condition should be formulated as succinctly as possible, e.g. „ The shortage of adequately trained skilled workers will put local industry at a severe disadvantage in the coming five years.“ or „ Low participation in education and training among young people leads to a shortage of adequately trained employees acting independently“[3]. The arrows of the main influencing variables causing this effect point to the statement at an angle. Each arrow stands for: „Contributes to the fact that…“. The main influencing variables are referred to as „the 8 Ms“, i.e.: **material, machine, method, manpower, management, milieu, measurement and money**. From these 8 components the relevant categories are selected. For each selected category at least one effective cause is identified and attached to an influencing-variable arrow. Referring to our examples, these categories would be: *milieu, manpower, method, money, and management*.

2.7. Main Causes and Sub-causes

By means of creativity techniques potential causes are investigated. They are represented by smaller arrows pointing to the arrows that depict the respective main influencing variable. If there are other causes that have led to these causes, the diagram can branch out further. The result is an increasingly fine ramification.[4]

[3] Any target formulated on the basis of the strategy paper can be entered here.
[4] If the causes reveal other causes, you can branch them continuously. So you have a precise picture with more and more detailed branches. (Schulte-Zurhausen, M. (2002): Organisation 3. Aufl., Verlag Vahlen München 2002, S. 514)

Fig: Ishikawa Model with main causes and sub-causes



In the following step the diagram is checked for completeness. This means that the moderator must make sure that all possible causes are taken into consideration in the course of the roundtable. He/she must put the Ishikawa Model in a place where everybody can see it clearly. Visualization makes it easier to find further causes. After that the potential causes are assessed in terms of significance and effect on the problem/condition. On the basis of the participants' knowledge and experience the team finally debates whether the root cause of the problem has been identified. In a subsequent step causes of a desired effect or the way they influence it are investigated. Based on the outcome of this analysis, actions intended to solve the problem or reach a certain goal will be identified.

2.8. Organizational Procedure of Roundtable Using the Ishikawa Model

Basic equipment

In order to work with Ishikawa Diagrams one needs a particularly big workspace on paper, e.g. two flip-chart sheets arranged next to each other or a big sheet of paper for the Metaplan board. Generally speaking: The more space there is available, the better.

Step 1: Definition of the problem

When drawing an Ishikawa Diagram one always starts by formulating a problem/condition to be avoided, true to the saying that “the fish always stinks from the head downwards”. It is important to make sure that all participants have understood the problem and agree with the way it has been formulated.

Step 2: Substantiating the 8M’s

Subsequently the backbone and 8 ribs are drawn (the drawing is easier to see if thick flipchart pens are used).

Now the 8M’s must be „translated” for the situation at hand. If one fails to do so, there is a considerable risk that each participant might make his/her own associations. Example: Is vocational training a task for educational institutions or enterprises? To which extent does milieu/method/manpower/management contribute to vocational education and training?

Step 3: Identifying potential causes

In this step the team searches for the main causes and sub-causes belonging to each category. In the present context one of the questions could be: „What impact does the factor „school education” (= milieu) have on the problem of apprentice shortage (=effect)?”. The question why main causes and sub-causes have an influence on the main problem is asked several times, which is the decisive feature of the Ishikawa principle, distinguishing it from simple cause-effect-diagrams.

By asking the same question repeatedly a depth of analysis is achieved that is generally not achievable in everyday work life. Following the original Japanese approach, the root cause is questioned at least three times and, in the best case, up to five times!

All causes mentioned by the team are entered in the diagram. In accordance with the rules of brainstorming there should be no comments on the value of contributions made to the Ishikawa Diagram.

Step 4: Setting priorities

In order to identify the main causes among the usually big number of potential causes, they can be classified as follows:

A = strong impact on effect

B = medium impact on effect

C = small impact on effect

The impact of each cause is assessed and displayed in the diagram. Subsequently only the A-causes are examined further. Figures, data and facts pertaining to the individual causes are collected in order to determine the actual root cause(s). When evaluating the A-causes, attention should be paid if any causes come up multiple times and if any “clusters” can be detected. This would indicate that one or several systematic root causes exist.

Step 5: Checking the causes

In this step the A-causes that are assumed to be most significant are checked for correctness, drawing upon the available information and experience. It may be advisable to consult relevant literature or call upon additional experts. By statistical means, the assumption that a cause identified also is a root cause can be supported by a significance test (hypothesis test). After conclusion of this step the project team should meet once more for a brainstorming session. They should re-examine every aspect of the completed Ishikawa Diagram, as this might bring further ideas and/or dependencies to light.

Step 6: Finding problem solutions

The Cause-and-Effect Diagram being agreed upon and completed, action plans are now developed on the basis of the identified main causes and sub-causes. These plans show how to eliminate the problem in the long term by means of corrective measures, how to avoid such a problem by preventive measures or how to improve the actual situation. The advantages and drawbacks of each of these measures should be assessed. In addition the quality, cost and introduction time of each measure should be determined and included in the evaluation. Based on the outcome of this evaluation, the best possible solution will be identified.

Step 7: End and/or outcome scenarios of the Roundtable

1.) Definition of problem and required solutions are concluded in the course of the roundtable.
2.) Discussion of topics was initiated at the beginning of the roundtable and continued in a series of discussions with the same group set-up.
3.) The group agrees upon solution scenarios and arranges an additional roundtable session to take place at a later date in order to check the correctness and effect of the implemented solutions.

2.9. Advantages of Method

One of the main advantages of the Ishikawa principle is its participatory and solution-oriented approach. This method provides a good basis for group discussion and allows the problems to be seen from multiple angles. As far as its organizational feasibility is concerned, the method is easy to learn and easy to apply.

2.10. Moderation

How the roundtable proceeds depends to a considerable degree on how it is moderated both in terms of contents and on an emotional level. The most important point for the moderator is to be able to adapt to the circumstances and to create an atmosphere which also allows for critical remarks, provided they are voiced in a respectful manner. For the roundtable to be a success, communication needs to be open and based on mutual trust. The common objective the participants have agreed upon needs to be regarded as worthwhile by all of them.

The tasks of the moderator can be summed up as follows: to formulate a concrete problem, to make sure that all participants identify with the topic, to guide the participants through the event and to use the methods and materials in such a way that a satisfactory outcome of the debate is guaranteed.

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3. Delphi Method

3.1. Introduction

By definition, the national strategies for lifelong learning cannot give adequate consideration to the requirements and specific circumstances of individual European regions. Above all the economically disadvantaged areas often see approaches and strategies in all areas of lifelong learning that inadequately address regional requirements. It is against this background that in many regions the demand for a regional specification of LLL strategies arises, which is above all expected to take the local economic conditions and frameworks into consideration. In response to this challenge, the WISAR Project sets out to develop regional economy-oriented strategies for lifelong learning on a cooperative basis. In the course of this project, the project partners will develop regional strategies of lifelong learning for their respective regions and make their experience (regarding methods and contents) available for exploitation and transfer to other regions by developing guidelines for the development of regional LLL strategies. These strategies will be implemented by using the adjustment methodology to match offer and demand on the levels of competences and educational contents.

The results delivered by the WISAR Project will provide the participating regions with sustainable strategies for lifelong learning matching the needs of the regional stakeholders.

Regional LLL strategy development

As there are huge local differences in economic structures and requirements, national LLL strategies are not sufficiently relevant, and there is a clear demand for adjusted and regionally relevant LLL strategies for the respective regions. Proceeding from the individual countries' national LLL strategies, WISAR will initiate the development of regional educational strategies, provide the relevant methods and have them embedded in the region by the policy-makers and decision-makers in education.

Methods development

The WISAR Project will develop a set of methods that make it possible to adjust the relevant regional LLL options to match the regional economic requirements and to define future developments. For this purpose the set of methods will contain the following:

a) Roundtables

b) Panels

c) Delphi

For these three methods a range of applications as well as the concrete application procedures will be defined and described. In addition, for all three methods the necessary materials to prepare and conduct the activities as well as to interpret the results will be developed and made available in all partner languages.

3.2. Delphi methodology

Background

The origins of the Delphi method should be found in the works of the Olaf Helmer`s team from RAND Corporation. In 1953 when surveying for the individual opinions, the team has introduced for the first time the repeated questionnaires which included also the results from the previous round of questions. [5] The survey was carried out in the six fields: scientific turning points, population size control, robotics development, space technologies development, wars prevention, arms control systems.

The method is the answer to the problems arising during the surveys and caused by the divergences in experts` opinions. The method allows to narrow the experts` opinions and to work out the unequivocal conclusion. Its core is forecasting the future pursuant to the given experts` opinions.

[5] Rowe and Wright (1999): *The Delphi technique as a forecasting tool: issues and analysis*. International Journal of Forecasting , Volume 15, Issue 4.

Methodical assumptions

3.3. Description of the method

The method is based on the questioning with the use of experts` knowledge and experience in particular fields. The survey gives both quantitative and qualitative results. The given opinions consider the trends of development in particular fields e.g. education, technology. In this method we consider only the fields important for the future development of the given topic, therefore the reduction of wide and unclear knowledge towards the only one opinion which shall be analyzed in the following stages of the survey, is necessary.

The aim of the Delphi method is: to organize a debate, to make a presentation and to elaborate the feedback from a questionnaire survey, and finally to achieve a common point of view. In other words, the method is used for communication and exchanging the opinions concerning the particular topic as well as for setting down the opinion about the future, and it is often used when the approximate data are not enough. The method is also useful while gathering the opinions from a wide group of experts and when there is no sufficient data concerning the future trends or when the open discussion on a forum is impossible because of various reasons. This method eliminates the domination of individuals and their influence on the others` opinions.

The Delphi method differs from the questionnaire survey in this, that the feedback given by experts in the next stages of the survey (questionnaires) are based on the feedback from the previous one (the results from the previous stage are essential knowledge and base for the next round of the survey). The respondents can base on the opinions from the rest of participants of the survey, but they are not under the pressure of the most dominant and influential individuals. The respondents, whose opinions are totally different from the general tendency or consensus achieved, are asked to explain their point of view after each stage of the survey, what shall be the interesting added value for the rest of experts.

This method eliminates also some disadvantages of the standard panel discussion e.g.: following “the leader”, heading in one and still the same direction.

Selection of the experts - criteria

The questionnaire with the entry requirements shall be developed when selecting the experts. The experts should be aware of the aim of the survey, and that their opinions will be available in the next stages of the survey. The survey is carried out in a few stages, therefore the participation of all experts shall be provided on each stage and the resignation as an expert during the survey is not very welcome. The group of selected experts should be of 25 – 100 and they should be experienced in a particular field – but this is not the prerequisite. While surveying, the experts are isolated and they cannot contact each other concerning the survey. They are asked to give a foresight forecast, and their individual opinions are given in the questionnaires sent by e-mail or post. The participation in the survey is anonymous.

The organization of the survey

The way of presenting knowledge and information in the next stages of the survey is quite essential while developing the questionnaires in the Delphi method. The most creative way is to establish working groups to define fields and to formulate opinions. The experts from the working groups have a tendency to add new topics rather than to reduce them, therefore the topics should be selected two or three times to be narrowed and elaborated in the final stage. The questions shall consider the experts' forecasts for a particular period of time. They can also include real limitations e.g. economical, technological, social, political, for the development or existence of the given topic.

Normally, one person deals with the administrative work and questionnaires management, including also presentation of the results to the experts. The questionnaires are sent to the experts in few rounds till the consensus is reached. Usually it takes 4 rounds but 2 questionnaires is the minimum when using the Delphi method. Presentation of the data shall be well-thought and adapted to the group of respondents. They are presented in a statistical way: a median and a quartile (used in a probability theory and statistics) are used for calculating each question. After the first round, the results are presented in the next stages, and the experts are requested to answer the questions according to the given opinions. The result from the survey is usually a forecast for a particular period of time (in the Delphi method the forecasting time is usually 30 years). Directions of changes, future development, together with all issues seemed to be interested for the survey can also be presented.

3.4. Summary (procedure)

In the Delphi method there can be indicated the following phases:

a) Selection of the topic and persons responsible for the organization of the survey i.e.: development and sending of the questionnaires, gathering, analysis and elaboration of the feedback;
b) Selection of experts;
c) Development of a questionnaire form for the first stage of the survey (questions in the questionnaire form must be clear and formulated in the way enabling statistical elaboration);
d) In the first questionnaire form the experts are also requested to assess their knowledge and competences in the survey topic (the assessment is requested only once and this procedure is not repeated in the next questionnaires);
e) Proofreading, editing of the first questionnaire form (orthographical and logical mistakes, elimination of unclear and ambiguous questions);
f) Sending of the first questionnaire form to the experts (by post or e-mail), feedback expected within approx. 10 days;
g) Gathering, analysis and elaboration of the results from the 1st stage of the survey, (statistical presentation of the results),
h) Development of the 2nd questionnaire form – questions are narrowed and more detailed. Apart from the questions, the results and opinions from the 1st stage are included. If one or some of the experts have a totally different opinion from the general tendency or consensus achieved, they are requested to revise the other opinions, justify their point of view and give the final opinion once again (it canl stay the same or can be changed),
i) Sending of the 2nd questionnaire form to the experts,
j) Gathering, analysis and elaboration of the results from the 2nd stage of the survey, (the same procedure as in the 1st stage, see: subsection “g”),
k) The procedure described in the subsection “h” can be repeated as many times as it is needed to achieve a common point of view. Usually it takes 4 rounds but 2 questionnaires is the minimum when using the Delphi method,

I) The final phase includes the development of the final report and presentation of the results from the survey.

3.5. Application of the Delphi Method in the WiSaR programme

Against the background of the regional LLL strategy, individual Delphi method will be implemented in order to match offer and demand as well as to underline competence requirements and to integrate them into the available education and training programmes (formal and non-formal).

This process aims to achieve an update of the Regional Strategy which will be developed to ensure long-term development of the local social and economic partners (educational institutes, businesses, politicians, formal or informal education providers, NGOs, etc.).

It should be noted that the era we live in, is characterized by rapid changes in the socio - economic level, therefore Delphi method requires similar efforts in future to take the appropriate decisions related to Lifelong Learning.

The following steps are proposed to be followed for the application of Delphi method in the program WISAR, are those discussed below:

- **Selection of experts involved in the survey and composition of the expert's team/working groups:**

The composition of the team of specialists is particularly important since this will determine the validity of the results. The survey will be contacted through a written argument. It will be consisted of two rounds of questioning -with a questionnaire tool- to members of the group established, a group of those people that their opinion in considered important such us people coming from:

a) Regional enterprises: especially in economically disadvantaged regions, local industry and its needs in terms of workforce competences (technical, social and methodological), regardless of the type of industry

b) Institutions of lifelong learning in the region: the providers of formal or non-formal learning options (both vocational and general education) play a key role in developing regional LLL strategies.

c) **Labour market institutions:** the regional labour market institutions (employment agencies, local authorities etc.) are key actors in regional LLL strategies and show a vivid interest in the precise matching of offer and demand in terms of competences.

d) **Individuals:** A regional LLL strategy also addresses individuals living in the area.

e) **Regional stakeholders:** Apart from the regional business sector, the regional LLL strategy places its long-term focus upon the whole range of key players in the respective regions (e.g. regional NGOs, municipalities, local and regional authorities, social partners in the region etc.),

Regarding the number of people consisting the group of experts it is considered that it would be among 15 to 20 people. Respondents will be informed at the outset of its objectives, the time needed by them, but also for the researcher's contact details and his availability to provide any clarifications or additional information may be required.

- **Questionnaire preparation for the 1st phase of the Delphi method.**

The questionnaires of the first round will contain mainly closed questions to enable a statistical elaboration of the results, necessary for the second round.

Make sure that questions are very clearly stated and make a small pilot test to verify that you get relevant responses.

- **Transmission of the first questionnaires to members of the expert group.**

The questionnaires will be send by e-mail or post to the experts involved in the survey and should be sent back approx. 10 days later either electronically or by post.

- **Analysis of the 1st phase responses.**

The responses of the first round will be processed by assigned person.

- **Preparation of the 1st questionnaire form for the Delphi method.**

Processing of information from the questionnaires in the 1st round will enable the researcher to synthesize and to remove any irrelevant material and to proceed the preparation of the questionnaire for the 2^{nd} round which will contain both closed or open questions.

- **Transmission of the 2^{nd} phase questionnaires to the experts.**

The questionnaires will be sent by e-mail or post to the experts involved in the survey and should be sent back approx. 10 days later either electronically or by post.

- **Analysis of the feedback from the 2^{nd} phase.**

In this phase, statistical responses to the questionnaires will be proceed by the researcher.

- **Processing, documentation and presentation of the results.**

The presentation of the results should include the statistical elaboration of the feedback.

Conclusively, there should be emphasized that the implementation of the Delphi method in WISAR project is not aiming at the absolute consensus among the expert team members participating in the survey, but at producing a series of views concerning the trends on the labour market at regional level, as regards the demand for specific skills and qualifications that are covered or should be covered by the formal and informal education system.

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4. Panel Discussion

4.1. Generally about Panel Discussion (PD)

Nowadays, analytical-prognostic practice applies a lot of many different approaches and methods (formalized, expert and intuitive, etc.). At its disposal is a variety of verified models that help in solving even very difficult tasks. This multitude of methods is multiplied by the usual practice and its various combinations or intersections.

Among other selected methods are methods or groups of methods that are used frequently and have shown that their correct usage leads to quality results.

A panel discussion is a type of discussion, where groups of experts ("panels") or other participants address issues from a given topic that emerged during a report that was presented beforehand (in various forms). We can also say that panel is a group of experts or people who have some special knowledge of the chosen topic. They exchange views on the topic, usually in front of an audience who may have a chance to ask questions at some point. Most panels have a chair or other leader.

Panel discussion for example, if an issue is too complex for one person to handle, a panel may be covered so a group of specialists can speak. Or perhaps the audience need to introduced or exposed to various people or viewpoints at the same session. Panel discoussion is also the event which involve professionalists in a certain field. These gather so as to solve a particular problem, which seem to be difficult to be solved by one person.

Panel discussions, however, differ from team presentations. Their purpose is different. In a team presentation, the group presents agreed-upon views; in a panel discussion, the purpose is to present different views. Also in a team presentations, usually speakers stand as they speak; in panel discussions, usually speakers sit the whole time. In panel discussion each speaker prepares separately, the other speakers here one another for the time at the session itself.

Technically, a panel discussion consists of questions and answers only. The compare/moderator must monitor time and manage questions. If each participant is making a speech for a set period of time, he should signal the speakers at the one minute to go mark and at the stop mark. If a speakers goes more than one or two minute he can stop them to gave the equal rights to each speakers. The compare must be a biased person; he is neither in nor against the topic. At the end the compare should summarize the discussion and thank the panel members. A good example of TV panel discussion format is the BBC's Question Time (*http://www.youtube.com/watch?v=6MrFV4c_sVY*).

BBC, Question Time (panel discoussion)

4.2. Function, rules and purpose of the Panel

A panel consists of a small group of six or eight persons, who carry on a guided and informal discussion before an audience as if the panel were meeting alone. The proceedings of the panel should be the same as for informal discussion: volunteering of facts, asking questions, stating opinions - all expressed with geniality, with respect for the contributions of other members, without speech making, and without making invidious personal references.

This primary function should occupy approximately two-thirds of the allotted time - say forty minutes of an hour's meeting. The secondary function of the panel is to answer questions from the audience. This discussion method is suitable for use when a relatively large audience is anticipated. The disadvantage of the method is that it confines most of the discussion to the panel itself. The audience listens and is given a chance to ask questions, but for the most part is passive and receptive.

Audience in Question Time, BBC

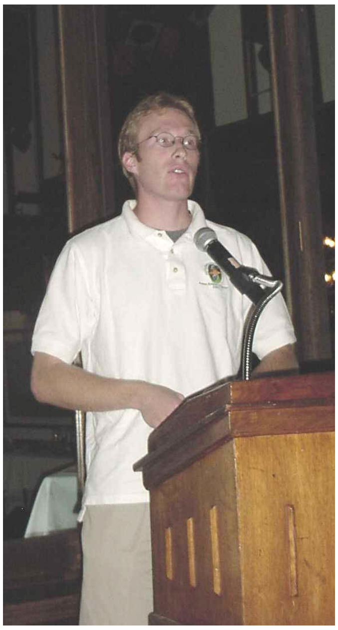
Rules of a panel discoussion are similar to those of a discussion. However, the participants of a PD are not selected (does not apply to the panel – it is advised to compose a universal, not a highly specified group) and the organizational rules are not as strict (records, conclusions and decrees are more of a manifestly character).

The purpose of a panel discoussion is predominantly to inform, to spread new pieces of knowledge based on the floor's particular interest, not just to compile implementation conclusions. A panel discussion can also contribute with certain findings and pieces and knowledge that originated on the side of the floor. The term used to describe a panel discoussion should be „a meeting", or "a meeting with experts", even when dealing with a less relevant topic and a less relevant conclusion.

Panel discussions, if well conducted, are usually more interesting to the audience than is the single-speaker forum. They provide sufficiently varied clash of opinion and presentation of facts to give even the quiet members of the audience a feeling of vicarious participation.

4.3. Quality and tasks of leadership in Panel Discussion.

A good leader can make big contributions to the success of panel discussion. If he is tactful and friendly in personality, he will probably be able to draw out the best in the men who make up the group. It is a very helpful thing in a lively discussion to have a tolerant leader who accepts a participant's opinion as something to be considered thoughtfully instead of jumping in at once to refute a view that disagrees with his own.



The leaders

The leader must in addition take special care to select panel members who can think and speak effectively. He must also be sure that they prepare themselves to discuss the subject.

4.4. Preparation by the leader

The leader must prepare for each meeting thoroughly. This is far more important than that he be facile in the conduct of the actual meeting. By careful preparation a leader can do much toward assuring an interesting meeting even if he is not an experienced chairman. The necessary preparations can be briefly stated, but they require time and thought.

The leader must, if possible, learn in advance the interests and points of view of the individuals in his group. If he can talk informally with them before the meeting, he can learn the general point of view of each and at the same time help each to become acquainted with him. This will tend to break down any stiffness which may be natural in the meeting of the group. The leader must also familiarize himself with the subject for discussion to the extent necessary for intelligent leadership. This does not mean that he is obliged to make himself an expert on any subject that may come into his program. To do so would be pretty obviously impossible. But he must know enough about the important issues to enable him to keep the train of talk on the track and moving forward. Like a good instructor he must not hesitate to admit lack of information. When a question arises, his normal procedure in any case is to direct it to some group member for answer. If no one sufficiently informed is present, he can with a feeling of perfect assurance suggest a source from which the missing facts may be secured. The leader should prepare an outline of the course of the discussion as he foresees it. He will, either as part of his outline or separately, prepare a list of questions which may or should be asked. He must not, however, permit his prepared outline to become a strait jacket for the discussion. The actual discussion can be expected to follow a different course from the one planned in advance, but an outline will assist the leader in his personal preparation. It will also help him to distinguish between major issues, which should be developed when they arise, and minor or unrelated issues, which should be quickly passed over. The leader must decide in advance whether he will use assistant leaders, and must see that they too are prepared. The leader must decide whether he will use such aids to presenting his basic facts as a blackboard, charts, diagrams, or other visual aids. He must have any such desired materials ready for use.

During the discussion by the panel the leader has substantially some duties but it is important that he should keep himself more in the background as chairman of the panel. He can do so because each member of the panel is in reality an assistant to the leader and is responsible for specific contributions to the proceedings.

4.5. Panel Discussion - Preparation and Implementation

There are three stages of panel discussion preparation and implementation:

Stage 1:

- Defining discussion aims,
- Specifying issue aspects,
- Separating disputatious aspects of a particular issue form those that are clear
- Specifying discussion topic,
- Scheme of the discussion progress – choosing analysis methods, ways and forms of argumentation, etc.

Stage 2:

- actual discussion,

Stage 3:

- discussion conclusions, accepting and approving the problem solution

One of the advantages of a panel discussion is the mutual experience exchange between the experts. Its disadvantage is a demanding organization.

4.6. Conduct of the Panel Discussion

In describing the duties of the leader much has already been stated or implied about the conduct of the meetings. There is a number of additional details which the leader must have in mind before and during the meeting :

- physical surroundings should be as comfortable and informal as possible. Whether the group is seated outdoors or in a library, seminar room, service club, or tent, the members should arrange themselves so as to be able to see each other. Smoking should be permitted. If the meeting is held indoors, the leader should be careful that the room is properly ventilated.
- the length of the meeting should be rigidly limited. It is better to close a meeting while the interest in the subject is high than to risk boredom by

allowing it to continue overtime in order to attain some aim or conclusion preconceived by the leader.

- to a newly organized group the leader should announce briefly the procedure to be used; that personalities are not to be discussed and that comments or questions must bear on the subject or be disallowed.
- stimulating and guiding the discussion is the most important job of the leader during the actual meeting. He should guide almost entirely by asking questions, by briefly citing a specific case followed by a question, or by summarizing. His questions should ask for reasons and causes (why?), for facts (what?), for circumstances under which certain things may be true (when?), for expressions of opinion (what do you think?), and for common ground upon which some agreement may be reached. The leader should avoid rhetorical questions and any question so obvious that it can be answered simply by "yes" or "no." These usually block discussion.
- Both controlling and encouraging participation by all members requires understanding and tact. The talkative member should be allowed only his share of the time, and then should be thanked for his statement and reminded that everyone must have his opportunity to speak. The silent member can be encouraged to speak if the leader will ask him a direct question about which he is known to possess information or to hold an opinion. The opinionated member must be led to understand that positions different from his are reasonable and that thoughtful persons do change their opinions. When the anecdotal member launches forth into his personal experience at great length, he must be handled as the talkative member. The impatient member is looking for a quick, cure-all solution and is perhaps too lazy to think a problem through. He needs to be told that the process of discussion consists, not of giving, but of carefully searching for conclusions upon which each individual usually must decide for himself.
- when the discussion wanders too far from the subject or when it gives signs of flagging, it is a good thing to summarize the chief points made up to that moment. The discussion can then be redirected by another question from the leader.

When the subject is thrown open to the house, it is the leader's job to recognize appropriate questions and to reject those not bearing on the subject or involving personalities. Some questions he may answer himself, but usually he should repeat the question and call upon one of the panel to answer it. By preliminary announcement the leader may also tell the audience that they may direct questions at particular members of the panel if they choose. In any case, during the question period the leader needs to maintain strict control. On many occasions this may be the toughest part of his assignment to carry off efficiently and with good humor.

While it is customary to confine audience questions to a specific period, some leaders permit questions from the floor at any time. Unless very carefully limited by the leader, this practice may interfere with effective discussion by the panel.

Arranging the panel properly will lend effectiveness to this form of discussion. The members should face the audience. It is important that each panel member adjust his chair so that he can see every other member without effort the chairman will also find that the best places for his readiest speakers are at the extreme ends of the table. He should keep the more reticent members close to' him so that he can readily draw them out with direct questions. If the quieter ones sit on the fringes of the panel, the more voluble members are quite likely to monopolize the discussion.

Panel discussion involves the following members;

- **moderator**-who is the time manager and act as a leader during discussion.
- **panelists** - these are the experts who are the main speaker of the panel.

During a panel discussion, the focus on the questions asked by the panel floor is not absolute, but rather dominant. A PD often develops into a normal discussion, especially if the floor is composed of highly interested participants, who are able to add further aspects to the current topic. Their presentations are remarks no more, but rather discussion contributions. Remarks and contributions can be uttered or presented in written form, they can be spontaneous or requested.

Some etiquette that ought to be observed in order to maintain a proper decorum during panel discussion are as follows :

- avoid stereotypes and do not let cross cultural stigmas affect your perception of other people or what they contribute to the discussion.

- respect the business cards. do not place them in your back pocket or write on them
- make sure you understand the cultural nuances given the setting and demography of the panel and observe them accordingly.
- use language that is easily comprehensible by all of the panelists and avoid jargon that may be confusing or alien to the panelists.
- do not address people with their first names unless they ask you to.
- be aware of the inherent diversities given the background of those in the panel.
- pay attention and observe a level of respect.

4.7. Panel Discussion's area of use

A panel discoussion's area of use are informational and educational activities. In this sense, it can be used during trainings and briefings as one of the teaching methods and ways of activating listeners. In economy practice, this method is used predominantly by the department of qualification care.

Area of use

A requisition for its use is the existence of a discussion topic, the need to hand over knowledge from this topic using a method that will activate participants, a certain need of feedback in connection with a necessary interest control, as well as finding out about other possible aspects of the addressed topic. Furthermore, it also requires the presence of an expert(s) on the particular field, a floor of participants asking questions and organizational preparation.

4.8. The advantage of a Panel Discussion

It is the already mentioned ability to activate listeners, to find out about the weak spots in the presentation and the opportunity to cooperate with the floor and thus provide the panel experts with new viewpoints and pieces of knowledge from the area of expertise of the floor participants. A certain shortcoming, which always has to be taken into account, is the freedom in presenting statements and sometimes even incompetent responds and suggestions form the side of the floor. In a PD, a certain non-systematic approach towards addressing the issue arises. This has to be corrected through a good PD management and for example through concentrating responds (by writing them down or memorizing) into factual blocks or their summing up for the individual floor members. This PD freedom lowers its usability for conclusion-making and for creating implementation measures.

One of the advantages of a panel discussion is the mutual experience exchange between the experts. Its disadvantage is a demanding organization.

4.9. Examples of Good Practices of Panel Discussion

http://www.youtube.com/watch?v=6uKxZhtlteY

http://www.youtube.com/watch?v=o-ur1zXsF6E

http://www.youtube.com/watch?v=43sUEFcD4Ro&feature=channel

http://www.youtube.com/watch?v=KN-Bv-MvIe8

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Lifelong Learning Programme

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