

# Guidelines for Moderators:

## *Roadmap to a Successful Conference*

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The ideal moderator of a conference session does more than simply introduce the speakers to the audience: a capable facilitator can do a great deal to lead the presenters and the participants on an informative journey. This article discusses expectations of a moderator and tips that can be applied to facilitate effective and efficient sessions at professional society meetings and to optimize the satisfaction of audience members. To assist first-time moderators become adept, these guidelines are comprehensive; however, even the most experienced moderators may benefit by reviewing this article.

**Key Words:** Moderator; education; quality; efficiency; guidelines.

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### ROLES OF A MODERATOR

The expectations of a moderator are multifactorial and variable, depending on the type of session he or she is asked to lead (1,2). The moderator should check with the meeting organizers about guidelines and regulations for the particular meeting. An effective moderator should be energetic and hands-on to ensure the success of the program under his or her oversight. Although many moderators understand their overt role during a session, such as introducing speakers and coordinating the podium exchanges and being the timekeeper, they may not realize that the function often extends to planning, coordinating, and communicating before the conference. This responsibility stems from the moderator's primary role as an advocate for the audience, which is best served by advanced reconnaissance and preparation.

Although preparation depends on the specific type of session – such as lecture, interactive, panel, scientific, or poster – moderators should be available to serve as a mentor or a coach for less-experienced speakers. Depending on the type of session and meeting, some aspects of the moderating will be different, but the principles will be similar. Optimally, the moderator is a seasoned speaker who is knowledgeable about the topics to be discussed. In appropriate circumstances, this may allow and encourage the moderator to coordinate speakers in the assigned

session, ensuring that the presentations are fluid and cohesive and not duplicative. In the coaching role, the moderator should know the preparation and production deadlines, and if appropriate, depending on the format of the conference and the structure of the program committee, serve as the coordinating contact with the central administrative staff. These functions should lead to success, particularly in respecting the designated program schedule and minimizing last-minute modifications. The moderator facilitates open discussion and audience queries when appropriate and should prepare questions to ask if the attendees do not have questions. The role of the moderator therefore entails more than simply showing up at the session, introducing the speakers, and taking questions. Checklists have been used in industry and in health care to ensure that key steps are not omitted and that standardized guidelines are followed, (3) and a checklist has been included here for easy reference (Table 1).

### BEFORE THE MEETING

With the exception of scientific sessions, the moderator's job often starts shortly after accepting the invitation to participate in the conference. The program chair may ask the moderator to help organize the session or to comment on specific topics or to suggest potential speakers. Assigning a second moderator may help a session run more smoothly, especially when equipment-related issues need to be addressed in real time. If comoderators are slated, a more experienced and a more junior moderator should be considered, providing the opportunity for the senior moderator to mentor the junior moderator and increasing involvement in the meeting by junior members of a society.

### COMMUNICATIONS WITH THE SPEAKERS

The first introductory contact is typically sent by the program chair and/or the meeting manager. For nonscientific sessions,

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**TABLE 1. Checklist for Moderators**

Before the Meeting	
Early	<ul style="list-style-type: none"> <li><input type="radio"/> Help pick topics and speakers</li> <li><input type="radio"/> Consider a comoderator</li> </ul>
Initial communication with speakers	<ul style="list-style-type: none"> <li><input type="radio"/> Session subject</li> <li><input type="radio"/> Topics and sequence</li> <li><input type="radio"/> Speaker names</li> <li><input type="radio"/> Allotted time</li> <li><input type="radio"/> Timetable for submitting:               <ul style="list-style-type: none"> <li>• Title</li> <li>• Learning objectives</li> <li>• Drafts of presentation</li> <li>• Questions, if applicable</li> </ul> </li> <li><input type="radio"/> Inquiry for accommodations</li> </ul>
Later communications with speakers	<ul style="list-style-type: none"> <li><input type="radio"/> Help coordinate talks: synchronize, avoid duplication, stay on track</li> <li><input type="radio"/> Suggest additions/changes/shortening               <ul style="list-style-type: none"> <li>• Reminder of speaker transitions: 1–2 min</li> <li>• Spots to hyperlink to end if running late</li> </ul> </li> <li><input type="radio"/> Reminder to avoid commercial bias, to add a “disclosure” slide</li> </ul>
Self-assessment modules (SAMs) communications	<ul style="list-style-type: none"> <li><input type="radio"/> Reminder of deadlines</li> <li><input type="radio"/> SAM questions: can help edit questions</li> </ul>
Preparation by moderator	<ul style="list-style-type: none"> <li><input type="radio"/> Arrange accommodations requested by speakers</li> <li><input type="radio"/> Speaker introductions:               <ul style="list-style-type: none"> <li>• Consider asking for curriculum vitae or biographic sketch</li> <li>• Internet searches on speaker</li> <li>• Learn to pronounce the names correctly</li> <li>• Keep introductions short: three-line maximum</li> </ul> </li> <li><input type="radio"/> Prepare questions               <ul style="list-style-type: none"> <li>• Read abstracts, especially for scientific sessions</li> <li>• Research background material, if needed</li> </ul> </li> <li><input type="radio"/> Print out list of speakers/notes/questions</li> </ul>
At the Meeting	
Before the session	<ul style="list-style-type: none"> <li><input type="radio"/> Speakers               <ul style="list-style-type: none"> <li>• Confirm speakers are present/will be present (Generally not for scientific sessions)</li> <li>• If a speaker cancels, consider a back-up speaker</li> <li>• Touch base with speakers and reaffirm/confirm:                   <ul style="list-style-type: none"> <li>■ Disclosure slide/time constraints</li> <li>■ Presentations uploaded</li> <li>■ Requests by speaker addressed</li> <li>■ Arranging to meet 5–10 min before session starts</li> </ul> </li> </ul> </li> <li><input type="radio"/> Room logistics/audiovisual equipment—visit meeting room to get familiar with layout               <ul style="list-style-type: none"> <li>• Podium, presentation system</li> <li>• Timing system</li> <li>• Microphones—on/off, adjusting height                   <ul style="list-style-type: none"> <li>■ Speakers</li> <li>■ Audiences</li> </ul> </li> <li>• Lights—how to lower/raise lights, location of light switches if not on podium                   <ul style="list-style-type: none"> <li>■ Keep lights off screen (can have more light in the back of the room)</li> </ul> </li> <li>• AV equipment</li> <li>• Meet people responsible for logistics, know to contact them                   <ul style="list-style-type: none"> <li>■ Phone number</li> <li>■ Button on the podium or presentation system</li> </ul> </li> </ul> </li> </ul>
15 minutes before session	<ul style="list-style-type: none"> <li><input type="radio"/> Finalize/review introductions and questions</li> <li><input type="radio"/> Arrive at least 15 minutes before the session</li> <li><input type="radio"/> Bring list of speakers/notes/questions</li> </ul>

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