



Guide for Moderators or Facilitators

Overview

As Johns Hopkins expands the ways in which it informs policy by leveraging the Hopkins Bloomberg Center in Washington D.C., affiliates will lead discussions with policymakers and policy influencers in new ways that embody our commitment to open dialogue and evidence-based policy development. The following best practices are general guidance for working with elected or appointed officials as part of a panel, roundtable, or informal discussion. Contact Federal_Strategy@jh.edu for more specific advice.

Pre-event Preparation

Know the audience. Understand their level of familiarity with Johns Hopkins and the topic. When scheduling, review the congressional calendar to avoid key dates or a planned recess.

Familiarize yourself with the panelists. Know the proper honorific for any public official and pronunciation of all names. Before the event, check with each panelist on their preferred title, affiliation, and pronouns. Look to see if they have a Hopkins degree, training experience, or previous affiliation.

Consider the staging. Determine your preferred setup (e.g., a podium for a formal address, comfortable seating for a fireside discussion, or a table with chairs) and review protocol for official seals, flags, and other government displays.

Know the ethics rules. In general, federal officials are prohibited from accepting gifts of even nominal value, but some awards or nonmonetary recognition may be possible. Contact Federal Strategy for specific guidance.

Evaluate technology needs. Assess whether microphones will be needed and if the room has correct adapters and hookups. If slides will be used, select unobtrusive placement of a central computer and provide a remote slide clicker to presenters.

Clarify media involvement. Let participants know if media are invited and whether the discussion will be off the record.

Establish learning objectives. Work with panelists to identify three or four key takeaways for the audience and clearly articulate the purpose or focus of the session.

Prep the participants. Convene a prep call at least one week in advance and follow up with an email summarizing the goals, responsibilities, and logistical information discussed.

Review disclaimer notice and preferences. For example, *Hopkins affiliates should state that their remarks are their own and do not necessarily reflect the views or positions of JHU or JHHS.* Agency officials and congressional staff may need to say something similar.

Plan for contentious questions. Identify roles and review plan for addressing difficult questions from audience members. Federal Strategy and/or Student Affairs can familiarize presenters with protest protocols.

Preview questions. To the extent possible, let panelists know the questions you will ask (or topics you will raise) so they aren't caught off guard. Ask panelists their ground rule preferences or topics to avoid.

Print handouts, as needed. Consider what resources would be helpful to participants on the day of the event and work with University Communications on use of name and logo approvals, e.g., attendee list with contact information, one-pagers with key messages, and public official biographical information.

Panel/Roundtable Moderation

Arrive early. Allow 15 minutes for a technology check and to arrange name cards if seating will be designated in advance.

Start on time. This may require asking people to take their seats two to three minutes before the start of the session.

Open the discussion. Introduce yourself, the policy topic/question, the game plan for your time together. Set the tone by conveying excitement, energy, and eagerness to learn.

Keep introductions short. If the group is large, ask participants to limit their introductions to one to two sentences each. Encourage panelists to indicate their unique perspective or area of interest in the policy topic, e.g., what they will contribute to the discussion.

Ensure all participants have the opportunity to speak. This may involve drawing out quieter participants or encouraging someone who is rambling to bring their remarks to a close.

Avoid “march down the table.” After asking one participant a question, encourage others to respond and react. Ask short follow-up questions that get to the “why” and “how.”

Managing Q&A/Closing the Session

Give clear instructions for Q&A. Establish how questions will be asked (e.g., should participants raise hands? Will a microphone be circulating? Only one question at a time?). Be prepared with a few questions to avoid empty space and prompt conversation.

Wrap up. Use the final moments to synthesize or summarize the discussion and reflect on main points. If follow-up is needed, be sure to identify those responsible and a timeline.

Thank the participants for their time and input.

Helpful Hints

Have a backup. Identify someone else who is intimately familiar with the goals and logistics of the day. You never know when you'll need someone to take over the role of moderator.

Use your own voice. While it is important to have a guide/plan for the session, don't read exclusively from a script.

Have a notetaker. This will free you to focus on the conversation in real time and ensure follow-up items are recorded.

Provide clear logistics. Ensure all participants have directions (and perhaps a map of the campus with the building noted), and any parking recommendations. Include a point of contact and mobile number of an individual who will be able to assist anyone lost or having issues on the day of the event.