

The African Growth and Opportunity Act (AGOA) Forum: Panel Planning and Management Guidelines

Introduction

The U.S. Agency for International Development (USAID) has several years of experience organizing technical panels for the AGOA Forum. Based on its experience and lessons learned, USAID has prepared the following guidelines to help panel organizers design and manage panels and other sessions for the annual Forum. These guidelines cover planning sessions, managing panelists and content, and “stage management” of the presentation immediately prior to and on the day of the Forum.

Planning Sessions

- **Identify a panel “gatekeeper.”** If there are co-chairs, they may decide who plays this role or designate a separate third party. The gatekeeper’s role is to set and enforce all deadlines, coordinate the review of presentations, communicate with panelists and the moderator, and ensure that final versions of materials are disseminated at the event.
- **Choose diverse panelists and coordinate effectively with other stakeholders.** Invite panelists from the private sector, government, academic institutions and other institutions who know the topic and provide diverse perspectives.
- **Set early and firm deadlines.** All panel organizers should establish firm deadlines for identifying and confirming panelists as well as receiving presentation materials for review. Given the anticipated time required to obtain visas, purchase airline tickets, reserve hotels, and complete other logistical matters, presenters should be confirmed at least two months ahead and materials be reviewed at least one month in advance of a Forum.

Managing Panelists and Content

- **Ask organizations to send their best presenters.** In cases where organizers are seeking the perspective of a given institution, stress the importance of good presentation skills in choosing panelists.
- **Prepare guidelines for panelists.** Organizers should prepare a set of guidelines for speakers to ensure that they know the audience and can convey information succinctly. The guidelines should specify the amount of time they have to give formal remarks, deadlines for submitting presentations for review, the rules for panel discussion, and role of the moderator.
- **Brief panelists on context.** Panelists should be informed of the audience and their level of expertise in the topics discussed. Presentations that focus on what a given institution does generically should be discouraged.

- **Ensure presentations focus on new information and insights.** For an informed audience, an introductory presentation is not required. Panelists should be encouraged to bring background material about their organization or research they are discussing.
- **Ensure delivery of presentations in advance.** Delivery requirements for presentations will vary from Forum to Forum. Even if the speaker has made delivery of a presentation to the designated audio/visual staff, it is important for the moderator to ensure that the presentation is loaded and operable before the session commences.
- **Schedule a mock presentation if possible.** This would help to address issues with timing and provide speakers a final opportunity to become aware of other panelists' presentations and better link each part into a cohesive whole. Circulating biographies of the panelists and moderator to all session participants in advance of a pre-session coordination meeting is recommended. If an in-person meeting is not possible, organize a teleconference.
- **Sequence presentations logically.** The sequencing of speakers has an impact on the quality of an overall breakout session. As part of the presentation review process, organizers should identify the appropriate order of speakers.
- **Limit the number of presenters.** Panels should have no more than four presenters and a moderator or discussant. Larger panels require more time and work of organizers while reducing the value-added of each individual participant.
- **Ensure ample discussion time.** Budget at least half an hour before the end of the panel session for questions and answers. Moderators should be prepared to formulate questions to stimulate dialogue if audience participation is slow to manifest itself, but not dominate the conversation if it is clear the audience has questions.
- **Prepare the moderator.** It is good practice to select an informed moderator for panels. The choice of the moderator may be made based on his or her technical knowledge, eminence, or position within a stakeholder agency. Often, USAID principals play the role of moderator. It is important for a panel organizer to prepare the moderator for his or her role. This includes providing background information on the speakers and presentation content, outlining the ground rules for the session (length of time each speaker gets, order of speakers, handling questions, and mechanism for keeping speakers on time), understand who panel support staff are (the interagency organizing team, session timekeeper, and technical experts), and arranging for a pre-event meeting with the speakers. In some cases, a panel organizer may be asked to provide talking points. It is preferable to have a separate time keeper for the session so that the moderator does not have to participate in the panel and visibly pressure the other participants to keep to their allotted time.

Stage Management

- **Schedule a walk through.** Conduct a walkthrough of AGOA facilities and transportation plans a few days in advance to assess last minute changes. New guidance for attendees, including signage at the venue, schedules, and venue maps, may need to be produced at the last minute.
- **Review audio/visual operations.** The moderator or panel organizer should ensure that audio and visual equipment is present, functioning, and adequate for the program. There may not be an opportunity to pre-stage the event in the same room so a check should be done for acoustics and sight lines. Ideally, the capacity of projectors will be known in advance, as older equipment may not properly project newer versions of Power Point and other software.
- **Review signage.** Signage for the event may be deployed in advance. If so, make sure that it is appropriately placed. It would be good practice to have signs in the common area and outside of the panel venue.
- **Know ushers and other support staff/services.** Ushers or other venue staff may be deployed to support the event. Their job is to direct participants to the correct room and to clear the reception area before the event commences. It is recommended that panel organizers review details with them as participants may ask variously where a given panel or speaker is. As ushers are often volunteers, it is best to review the program logistical arrangements with them. Also be aware of any hospitality provided such as beverages and snacks. Make sure panelists have water available and replenished.
- **Identify and meet with rapporteurs.** Panel organizers should identify who the rapporteurs are and ensure that they are in place and ready in advance of the session. It is also helpful to be able to help the rapporteurs get copies of any presentations or speaker notes in advance of the session, if possible, or afterward if not.
- **Gather panelist contact information.** It is important to obtain precise contact details for panelists to confirm arrival in the country where the Forum is held and in the event that the program changes due to unforeseen events. At the Eighth AGOA Forum in Nairobi, for example, many of the panels were reduced in time or combined with other panels. Room changes and speaker changes are also likely and this information should be conveyed to panelists.
- **Ensure good time-management of the panels.** By working with the speakers ahead of time to stress the importance of staying on message and within their allotted time, the overall impact of a panel can be improved. Use a timekeeper and off-stage signals to presenters to warn of time running short and to cut short presentations that run over time. It is good practice to give a five minute warning and to ensure that the moderator does not have to also play the role of timekeeper.
- **Receive handouts and other materials in advance.** It is best to have materials provided to you the day before the event at the latest. This will allow for review

for content and numbers. Before the event, these materials should be placed in a visible place but not where traffic will distract presentations. Make sure you have a master set for the file of both hard and soft copy. Regarding the latter, all presentations and support materials may be made available to the AGOA Forum coordinator for posting.

- **Convene a pre-session meeting.** It is important to inform your panelists that they need to be at the venue at least 30 minutes before the scheduled event. This will allow recitation of some of the ground rules and respective roles as stated above, capture any relevant information from other Forum events, and allow panelists to meet any substitute speakers. It is particularly useful to remind speakers of the time allotted, who the timekeeper is and what the warning signals are, what the order of presentations is, what role the moderator will play, and what the rules are governing questions and answers.
- **Convene a post-event meeting.** The moderator or panel organizer should obtain any presentations and ascertain that rapporteur notes are being sent to the appropriate coordinator. You should get impressions from panelists on key “take-aways” in terms of themes and attitudes of participants.