



PANEL DISCUSSION TOOLKIT

1. INTRODUCTION

Welcome!

Welcome to the networking event toolkit, we'll walk you through every step of running an incredible event! From planning, to ensuring your guests generate meaningful connections and nurture their new relationships; we've got it all. Relax and trust in the toolkit.

Questions, comments, or concerns? We're just an email away at letstalk@nemontario.ca

What's in the toolkit?

Running a panel discussion should be fun, to help things run smoothly, we developed resources and tools to help you along the way, including:

1. Introduction

- Start with why

2. Event prep

- Choose a theme
- Think about the people
- Defining success
- Choose a format
- Planning the event
- Selecting panelists
- [Moderate like a boss](#)
- Prep the team
- Promotion

3. Event day

- Room set-up
- [Video & photo release](#)
- [Slide template](#)
- [Agenda template](#)

4. After the event

- [Thank-you notes](#)

What is a panel discussion?

A panel discussion gathers diverse perspectives to consider a (hopefully) engaging topic, often facilitated by a moderator. It's not all about the panelists, audience members are encouraged to ask questions and share perspectives as well! This type of event is a great opportunity to connect the NEM 2020 themes of life-long learning, ethics, and equity, diversity and inclusion to a range of audiences.

Start with why

The key to organizing a great panel discussion is to start with an objective, or your "why." Check out leadership expert Simon Sinek's TED Talk: [How great leaders inspire action](#) to learn more about his "Find your Why" model.

Before any planning begins, think through why you're organizing a networking event. What do you want to accomplish? What do you want guests to get out of the experience?

Get clear on your 'Why' first, and use that clarity of purpose to help you make decisions throughout the planning process. [How To Plan Your Event With Purpose & Passion](#)

2. EVENT PREP

Choose a theme

What are people going to talk about? Step #1 is choosing a nuanced topic or theme. Considering NEM 2020 strategy is a great place to start.

Equity, Diversity & Inclusion (EDI)

Promoting the practice of equitable, diverse and inclusive cultures that advance social justice and innovation in engineering solutions.

Ethical Leadership

Empowering students and professional leaders to address ethical issues and provide thought leadership in the profession.

Lifelong Learning

Helping students and professionals navigate their careers and reinvent themselves in a rapidly changing world through mentorship, networking, and life-long learning.

Still a little stuck? What are you interested in? If ethics and engineering is your jam, have conversations with people in your workplace or community to get perspectives on how to explore the topic. Don't limit yourself to the engineering community, other disciplines like philosophy, art and history have interesting insights to share about ethics. Different perspectives spark creativity!

Think about the people

Once you've identified an interesting topic, it's time to brainstorm who else will find it interesting. An uninterested audience that doesn't ask questions can be a real dudd. It doesn't mean your topic is boring, you just haven't found the right crowd.





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2. EVENT PREP

Think back to your 'why,' what are you trying to accomplish and what value do you bring to participants? The key to providing value is to know your audience.

Defining Success

What does success look like for you? Link your definition of success to your original "why" statement and set reachable goals. While it's valuable to plan for reaching these goals, it's also a good idea to stay flexible and leave room for things you hadn't anticipated.

There are different ways to measure success, for example the number of participants, volume of ideas, and event publicity are straightforward and fairly simple to capture. If you want to understand the deeper impact of your event on participants, key stakeholders and your team, consider having quick interviews with people, or asking for reflections. For example, you could have a group discussion with your team at the end of the event to debrief their experience, what worked? What could have been better?

What's the format?

The good news is that you have options, the even better news is that no format is perfect so you can tinker and adjust to create your ideal setup. For a one hour panel, there are [three popular formats to consider](#).

1. Q&A Style

- 2-5 min introduction of the topic and panelists
- 25 min of curated questions from the moderator
- 10-15 min of Q&A with the audience, ending with a summary and thanks.

2. Initial Remarks Style

- 2-5 min introduction of the topic with each panelist taking 5 min to introduce themselves and their perspectives on the topic
- 20 min of curated questions from the moderator
- 10-15 min of Q&A with the audience, ending with a summary and thanks.

3. Presentation Style

- 2-5 min introduction of the topic and panelists
- 10-15 min of panelists sharing their perspective on the topic uninterrupted
- 5-10 min of Q&A with the audience, ending with a summary and thanks.

Planning the Event

Now that you have strategic components are in place, it's time to coordinate the logistics. Not sure where to start? Don't worry, we've put together key things to consider in our Event Planning Spreadsheet.

1. Planning takes time

Depending on the scope and size of your event, you need anywhere from 3-10 weeks to adequately prepare. Consider how many attendees you'll have,

the number of activities, and the general scale of your vision. No matter how long you think it will take, we recommend adding an extra week for good measure.

2. Get inspired

Attend a variety of panels before organizing your own, especially if you've never organized one before. This will help you think about what you might want to replicate or avoid.

3. Food, food, glorious food (and other essentials): Venues, food and refreshments can be donated through [in-kind sponsorships](#).

4. Space matters

Think about your estimated group size, venue location, the accessibility of the space and the overall atmosphere. Be mindful of your participant's comfort, a group of 100 probably isn't suitable for a small cafe.

5. Pick a time

Panel discussions typically run for two hours: one hour for the panel and one hour for networking. Your 'ideal' times depend on your audience. Research shows that weekdays, between 5:30 - 7:30pm work well for panel discussions. Your time should inform how you think about food. If your event is at 1 p.m. you can assume people had lunch and provide light snacks, if your event is a 6 p.m. consider providing something more substantial. If you choose after-work hours, give people enough time to get there!



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2. EVENT PREP

6. Participation

Continue to reflect on your target audience as you make planning decisions.

- Are your panelists engaging and interested in the topic? Will it be an internal, company-wide or public event?
- **Are you aiming to invite particular groups, like underrepresented groups or communities who are underrepresented in engineering and technology?**

7. Click, click, it's me!

You're creating an awesome event, make it easy for participants to access information and register. Build an online presence to make engaging with you and your team easy and inviting. Psst.. it doesn't have to break the bank, a thoughtful one-page site will do! You can use tools like GitHub Pages or Smore to create something that's easy, quick and effective.

Not sure what to include? Get people excited by sharing the theme of the event, where it will be located, and when it will take place. Need an easy and quick way for participants to sign up and to keep track of RSVPs? Check out [Eventbrite](#), it's free and easy to use! Eventbrite can also help you set up a payment option and will send a calendar invite to participants so they won't miss the date.

8. There's no "I" in team

You're great, but you can't do this on your own. Think about the help you'll need:

- How many volunteers do you need?
- What other team members will you need?
- What's your recruitment plan?

9. Tech

What kind of equipment do you need to run a smooth event? Are you are using a powerpoint (we recommend you do), will you need a projector? What about audio equipment? If you have more than 50 participants, it's a good idea to use microphones so everyone can hear your instructions.

10. What's the plan?

Create a project management plan to keep you and your team on track. Write out important logistical details to make sure you don't miss anything leading up to the big day. We know this can be stressful, so we created this [spreadsheet template](#) to help you out. This is a 'view only' copy - you can make a copy and can fill in your own dates!

Selecting panelists

Panelists can make-or-break the event. You want to attract panelists who can contribute to a thought-provoking discussion. Use your 'why' to help you select an awesome group of panelists.

1. Audience

Ask yourself: if your panel went perfectly what kinds of questions would your audience ask? How do you want your participants to feel after the event? Understanding what your audience appreciates in a panel, makes your job of deciding who should be on the panel much easier.

2. Theme

The key learning or theme of your event should inform the panelists you approach. For example, if your panel covers climate change topics, the message being the emergency state of the world, select panelists who are ready to speak candidly to this issue. Include panelists who hold different perspectives, like those from government, advocacy organizations and technology perspectives.

3. Perfect panelists

Diversity in identity, disciplines, and worldviews are key to generating thought provoking dialogue. If your panel focuses on climate change, don't only select panelists from science backgrounds. If you do, you're limiting opportunities for discussion and challenging conversations. For an interesting panel you want D.E.E.P- [diverse](#), [expertise](#), [eloquent](#), [prepared](#).



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2. EVENT PREP

Moderate like a boss

You've worked hard organizing the event, don't forget about the moderator! They have to make sure all panelists have equal opportunities to speak, ask insightful questions and listen carefully. It's rewarding and challenging, and a great opportunity to practice facilitation skills. We've put together some [hot tips](#) to set anyone up for success.

1. Be prepared

If you've never moderated a panel before, get familiar with the basics, like your panelist introductions and questions. Sure, it's great to come up with fully formed and thoughtful questions spontaneously but it's harder than you think. If you freeze up, it'll be helpful to have the guidance of some pre-written questions.

2. Know when to move on

One of the hardest and most frequent challenges you'll face is when to stop a long-winded panelist. The second hardest is doing it tactfully. It can feel awkward to interrupt someone, but think about the audience, they're probably ready to hear another perspective. Stop a long-winded panelist with a positive statement. Capture their attention by simultaneously making a hand gesture and breaking in verbally, you can say something like, "That's a great point, Joe, and I'd love to hear how Preeti would respond."

3. Direct your questions

Taking a hands-off approach and tossing out questions hoping someone will take the bait can cause awkward silences or lead certain panelists to dominate the conversation. Avoid this by directing your questions to specific panelists.

4. Sense make

As a moderator you represent the audience in the panel. When panelists say something interesting, or confusing, jump in to sense-make for them. Use open ended prompts like:

- "Tell me more"
- "Can you explain that in more detail?"

Prompting your panelists to elaborate can take you away from prepared answers and into fruitful territory. Take "Challenging Conversations" and turn them into "Generative Opportunities". Help the audience see both perspectives.

Prep the team

- Confirm panelists & moderator 4 weeks in advance.
- Schedule 30 min calls with each person to explore what they're most interested in sharing, and experiences related to the topic.
- Create a list of questions for panelists based on the calls. Think about what everyone is working on, has in common or disagree about to generate engaging conversation.

- Focus your questions, pick 2 questions for every panelist.
- Send the questions to your panelists at least 1 week before the event so they have a chance to look them over and think through their answers.

Promote the panel

[Eventbrite](#): Explore different payment methods, for example charging \$20 and reimbursing participants when arrive at the event, gives the audience an incentive to show up. Or, ask people to pay \$10 to cover food and refreshments, consider donating profit to a charity and/or non profit.

[Meetup.com](#): Find groups in your area who align with your event topic. You can search for groups based on location and topic. *Consider inviting participants from outside of the engineering community, extend invitations to the philosophy and anthropology disciplines or the department offices and faculty at your university or college; reaching out to the human resources and marketing departments at your workplace; or connecting with local interest groups in your area.*

Social Media

Start by setting up a communications schedule to organize your posts in one place. [CoSchedule](#) has some amazing free templates to download.



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3. EVENT DAY!

Room set-up

You're almost there! Conversations are more fluid and inclusive when held in a circle. If your event has under 50 participants this could be an ideal set-up. Plan your room set-up ahead of time. Planning in advance ensures you don't run into any surprises on the day-of.

You may want to register folks at the door and use this [video and photo release](#) for permission to use their image. Here's a [slide template](#) in case there's a presentation planned.

Agenda

Your schedule might look something like this:

1. Arrive early

Ask panelists arrive at the venue 30 min before the event begins to meet each other in-person.

2. Land acknowledgement

When everyone is seated, open your event with a land acknowledgement. Make it personal by talking about why you think a land acknowledgement is important and what you or your organization are doing to pursue reconciliation.

3. Panel discussion

Choosing one of the three formats above or create your own. We recommend the panel last for an hour.

4. Network

After the panel discussion, schedule around an hour for informal networking. Give the audience a chance to connect and reflect on the discussion and continue the conversation. See our custom guide for tips on how to be a superstar networker - a tool that you can send out to attendees before the event.

4. AFTER

Thank you notes

After your event, celebrate and show appreciation! Send thank-you notes within 24- 48 hours after the event to your facilitators, organizing team, guest speakers, partners, sponsors and anyone who supported the event. It's a great way to show gratitude and maintain relationships.

Participant Surveys

It's a best practice to follow up with your guests and ask them to reflect on the experience and give you feedback. This gives them the opportunity to digest why the event was valuable or how it could have been better. This will help you gauge what could be done differently next time and what worked really well.

As part of National Engineering Month Ontario, we have created a standard survey used in 300+ events happening across the province. Sending this survey to your participants will help us collect consistent information across the events and identify patterns and insights.