EMAIL TEXT (PLEASE PERSONALIZE AND REMOVE FROM THIS GUIDE)

Dear MODERATOR:

Thank you for agreeing to moderate the breakout session, “TITLE” at the upcoming RWJF Summit on increasing value in health care! We are so pleased to have you on board and look forward to your session.

Attached you will find confirmation of session logistics, detailed information about your panelists, and a moderator guide. We hope that this material, along with your prep call, scheduled on DATE AND TIME, NUMBER TO CALL, will sufficiently prepare you to moderate your session. If you have any questions or concerns, feel free to contact me. See you soon!

Thanks again.

Best –

SESSION LEAD

**ABOUT YOUR SESSION**

Session title: TITLE

Session location: LOCATION

Session date and time: DATES AND TIMES

Staff content lead: SESSION LEAD

Key contacts:

* Session content lead: NAME, email, phone onsite if there is one
* Logistics lead for speakers:

INSERT FULL SESSION PIECE FROM THE PROGRAM

**ABOUT YOUR SPEAKERS**

INSERT SPEAKER PHOTOS AND BIOS

**GUIDE FOR MODERATORS**

Thank you for agreeing to moderate a breakout session at the upcoming RWJF summit on increasing value in health care! We are pleased to have your expertise and energy to help make this session engaging and compelling.

**Our philosophy on breakout sessions.** Panelists, as you will hear on your prep call, are not expected to give the 20-minute speech they give at every conference, with accompanying PowerPoint presentations. We don’t need them to lay out the history of their organization or all the thinking that led them to this point. We want to hear the most salient points they have to make, we want the audience to be inspired by their results or intrigued by their struggles. We don’t want to know the names of everyone on their team or need the specific dates of each activity. We want engagement.

**Our philosophy on moderators.** We wanted you for a reason! Your job is the most important one in the room. Evaluations tell us that the moderators can make or break a session. We invited you to be a moderator because we believe that you bring not only the expertise but the energy and skill to make this session lively. Some people have tons of expertise but can’t command a room. Some people can command a room but don’t have the content knowledge. You are here because you have both.

**THE FLOW OF THE SESSION**

There is no one way to organize a session, and we like that each session varies depending mostly on the moderator’s style. These are the components of the session:

* **Welcome.** You will briefly welcome the crowd and introduce yourself. You do not need to introduce your panelists yet, but if you do, you should merely say their name. We want you to jump right into content.
* **Stage setting.** You will set the stage for the topic. Why are we talking about this subject today? This should take you no more than 5 minutes. You should remind people that this session will be interactive and participatory, that you will be looking to them to ask questions and share their stories. Then you should begin.
* **Opening the conversation**. Depending on the flow of your session, you can handle initial introductions in a number of ways. Each panelist will be prepared to give a short overview of who they are, so you don’t need to do traditional introductions. We recommend that instead of running down the panelists one after the other, you start with a substantive question.

*Now that you know why we are here and what we hope to accomplish –I want to jump right in by starting with Frank Jones. Frank, your hospital did not start off being a champion of patient engagement, did it? What sparked this intensive focus by your team?* (This will then be the first time Frank speaks, so he will introduce himself before answering.)

* **The audience.** Get them involved early. “How many of you are in a program that now focuses on this issue? How many are here to find out if you should focus on it?” Not only do these big questions help them think about how they fit into the conversation, but they can help you tailor your session. Work to balance panelist time and audience time. A good ratio to shoot for is 60% panelists, 40% audience. This will vary depending on your dynamic.
* **Q&A period.** There isn’t one. Again, the entire session should be a conversation so there is no need to leave room for Q&A. There will be a mike set up in the room, or held by a staff person, that audience members can use for projection.
* **The end.** A staff person will flag for you when the session is 5 minutes away from closing so you can wrap it up.

**THREE TIPS FOR MODERATING A SESSION**

**Ask unexpected questions.** Think Oprah. Oprah doesn’t say things like “Tell me about your background” or “How did your organization decide to support this program?” Oprah asks questions that are based in knowledge, like “There was some controversy when you tried to set this up. Tell me how you overcame that.”

Some ways to find those questions …

* The prep call and background material provided by your National Program Office contact should help you think through questions that will get to the meat of people’s stories.
* You as the moderator should also feel free to talk to panelists prior to the meeting if you want to go deeper. We don’t have to be involved.
* Your staff contact can pull together good questions from the panelists to fuel your inquiries. We often ask panelists “what are three questions we should ask you to be sure you can tell the most important piece of your story?”

**Keep the conversation on track.** Your job, as the guide for this conversation, is to set up the topic and then keep the conversation on track. You are the “boss of the room.”

That means …

* If an audience member asks a question or offers a statement that will take the conversation off track, you can rephrase it or pivot it. “Thanks, Marianne, for sharing some of your personal frustrations about getting a partnership to coalesce in this area. I think the larger issue of partnership is an important one. I want to turn now to panelist x – Joe, tell us a little about how your hospital leadership reacted to your outcomes.”
* If one audience member or panelist is dominating the time, you can interrupt or redirect to get other voices involved. You can use phrases like “I’d like to pull it back to …” or “I think the original question was focused on …”
* If a panelist goes on too long, you should find a break and interrupt. Ask another panelist to react or redirect.

**Don’t shy away from controversy, and steer clear of boring.** Heated conversation is fine, differing opinions can be engaging. The danger is when it gets personal or goes off track – or when someone is droning on and on and the natives are getting restless. Walk the line, but its better that people are fired up rather than dozing.

**WHAT ABOUT SLIDES?**

We have a philosophy on slides. They are not a handout and should not be text-laden missives. If panelists have a good handout, we will gladly put it up on the website.

Slides are not by any means required, and we have many sessions that avoid them altogether. They are a crutch and keep the presentation one-to-many focused, when what we are looking for is a conversation. Slides are most useful when:

* a panelist has a visual to share, a data point, a screen shot, a photograph
* the slides are few and far between, but add real value to the conversation
* the slides include an embedded video file (under 2 minutes is best)

**OUR BREAKOUTS AND SOCIAL MEDIA**

AF4Q meetings have a strong social media presence, primarily on Twitter. You will see we put Twitter handles for speakers in the meeting materials.

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We hope you find this guide useful and look forward to your session. If you have any questions about your breakout session, feel free to contact your session lead or XXX.

See you in Washington, DC!