Session Facilitator, Moderator, Chair, and Discussant Instructions*
2020 NCFR Virtual Conference

If a session has a moderator or a chair rather than a facilitator, the following responsibilities will be performed by the moderator or chair.

Before the Conference

- **Read presenter biographical material** obtained from each presenter before you record your session. If you have not received the material from the presenters by Oct. 15, contact your section chair or **Cindy Winter** (cindywinter@ncfr.org) to obtain this information.
- **Plan ahead.** Prepare your introductions, expectations for the session, discussion questions, and materials you may need prior to the session so that all is ready when the session or recording starts.
- **Connect with the presenters** in the session before the conference. You may want to discuss expectations for the session.
- Optional: **Schedule a practice time** with the full group before recording or presenting live. This will help you practice and get comfortable with the technology.
- **Know where to find support** if any issues emerge during live sessions. There will be an NCFR representative in every session that can assist. Additional support channels will be available during the conference.
- **Be comfortable with Zoom**. See the list of Zoom resources above. www.youtube.com/channel/UC2SxmE4C-KAQuHaEfHVymgQ
- **See additional instructions above under Recording Your Session.**

Recording Sessions

- Control your environment before recording. The environment should be free of noise and distractions. This includes anything that may interrupt your computer audio. We suggest closing out extra tabs, apps, and software programs not needed during the presentation as well as silencing notifications to avoid disruptions during your presentation.
- Put participants on mute who may not have done so themselves to avoid extraneous noises during the recording.
- Press record.
- Welcome everyone to the session with the session title, date, and session number
- Introduce yourself and your role.
- Provide the ground rules of the session:

- o Everyone should be on mute during the session, except the presenter during their presentation time. This is still necessary as the recorded may be played with a live audience.
  - o Share how questions should be asked after the presentations, what to expect for the discussion, and how to communicate with one another. You are setting the standard for the session. Question and discussion functions depend on session type. Additional information is provided below under session types.
  - o Provide instructions if any interactive tools will be used during the session.
  - o When questions will be answered (after each presentation, at the end of the session)
  - o Notify the participants that any the session handouts are located on the session page in the conference platform.
- Introduce the presenters. You may choose to provide more information about the presenter between presentations while screen sharing changes from one presenter to another. Introductions should be no more than three minutes total.
- Monitor time and provide presenters with time limits. You can notify presenters privately through chat when they have 5 minutes and 1 minute left of their presentation. If the presentations are too long, you may have to interrupt the presenter. Time limits are noted under each session type below.
- All panelists/presenters must be given an opportunity to present before the discussion.
- Mute yourself when not contributing.
- If your internet connection gets glitchy, disable video.
- End recording and submit to NCFR.

During the conference: Pre-recorded Sessions

- Pre-recorded sessions will be conducted via Zoom at their scheduled time. Rather than presenting live, the pre-recorded video will be played and the Zoom features (i.e. chat, Q&A) will be available for live interaction.
- You are expected to attend the session at its scheduled time (check the program schedule for the scheduled time of this session). You can access your session by logging into the conference platform and navigating to your session in the agenda.
- Play the video during recorded sessions.
- Monitor the waiting room for attendees who arrive late and allow them into the session.
- Be an active listener. This will help you facilitate the questions.
- Write down additional questions during the presentations to use during the discussion time, if necessary.
- Facilitate questions. **See additional information below under Facilitating Live Q&A below.**
- Mute yourself when not contributing.
- If your internet connection gets glitchy, disable video.
- Thank everyone for attending at the end of the session.

- Please read the next section: During the Conference: Live Sessions for additional relevant material.

During the Conference: Live Sessions

- Your session will be started by a Zoom support person (i.e., NCFR Staff) 20 minutes prior to the start of your session. Presenters will enter a waiting room. The Zoom support staff will elevate the presenters to a presenter role. All attendees will be allowed into the session approximately one minute before the start of the session by the Zoom support person.
- **Arrive 15 minutes early to your Zoom session** to check in with the presenters and Zoom support staff. This will help you work through any technical difficulties before the session begins, coordinate last-minute details, and build rapport with each of the presenters to create a comfortable environment.
- You can access your session by logging into the conference platform and navigating to your session in the agenda.
- The session will be recorded automatically for use on demand.
- Put participants on mute who may not have done so themselves to avoid extraneous noises.
- Welcome everyone to the session at the beginning of the session with the session title, date, and session number.
- Introduce yourself and your role.
- Provide the ground rules of the session:
  - Everyone should be on mute during the session, except the presenter during their presentation time. This is still necessary as the recorded may be played with a live audience.
  - Share how questions should be asked after the presentations, what to expect for the discussion, and how to communicate with one another. You are setting the standard for the session. Question and discussion functions depend on session type. Additional information is provided below under session types.
  - When questions will be answered (after each presentation, at the end of the session)
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- Write down additional questions during the presentations to use during the discussion time, if necessary.
- Facilitate questions. **See additional information below under Facilitating Live Q&A below.**
- Mute yourself when not contributing.
- If your internet connection gets glitchy, disable video.
- Thank everyone for attending at the end of the session.

Facilitating Live Q&A

- All presenters, facilitators, moderators, chairs should have their cameras on during the live discussion period. Participants in interactive sessions may choose to have their camera on as well. Additional details can be found below in session types.
- Review the questions before asking. If there are several questions of the same topic, paraphrase to ask them all.
- Presenters may choose to answer in the chat questions that arise during the session. Be careful not to ask those questions again.
- Facilitate live questions after the presentations. Questions will be asked through chat, a questions box, or live when an attendee raises their hand. How questions are asked depends on the session type. See additional information below under session types.
- Verbally ask all written questions so that everyone can hear them.
- **Invite all attendees to participate.** Remind them how to ask questions. If a discussion does not begin, ask one of your preplanned questions.
- Give everyone time who wishes to talk or ask questions. Each question or comment should be around one minute each. Tactfully intervene if a person takes too much time.
- Keep the discussion on topic and progressing.
- Maintain professionalism and objectivity.
- Be flexible. Ensure everyone gets a chance to ask questions equally from the various methods of asking questions.
- Allow a bit of silence after a question so people can think, respond, and to use the technology. Remember that sometimes people need a moment to collect their thoughts. Silence may be okay. However, if there aren't any questions, ask your previously prepared questions to facilitate the discussion.
- Help clarify questions as needed.
- Be enthusiastic.
- Be calm and have a sense of humor, especially if technical difficulties arise.

General Descriptions for Facilitators, Moderators, Chairs, and Discussants
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Facilitators

Specific instruction for facilitators can be found above. Facilitators are responsible for running the session as well as facilitating the discussion. Facilitators should prepare in advance 1 to 2 questions that can initiate a discussion between the presenters and the audience. Facilitators should receive all papers in advance in order to prep for the session. The facilitator also is a "time-keeper" to ensure that the session moves in a timely manner and that all presenters are given equal time to present their material.

Moderators

Moderator will follow the same instructions as facilitators noted above. They will run the session and facilitate the discussion. Moderators are often used during panel presentations and are responsible for asking panelists pre-established questions. Facilitators are not included in sessions with moderators.

Chairs

In some sessions, session chairs will be responsible for running the session and facilitating the discussion, particularly with symposiums. Chairs will be responsible for when facilitators or moderators are not scheduled in the session. If a facilitator is scheduled for the session, the chair will introduce the session and presenters and ask the questions.

Discussant

The discussant gives a 5-minute "take-home" message after the presentations integrating information presented and pushing the message forward. For example, describe how the papers are connected, issues for elaboration and discussion, implications for research, practice, or policy.