**TOPIC MANAGEMENT TOOLS: Moderator Details**

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| **PRESENTATIONS or EXPLORATIONS:**  most often a WHY issue - significant, unresolved and emotionally complex.  **TOPICS**: often HOW, WHAT or WHEN – less time needed, more tactical, new ideas, perspectives or experiences. |
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| http://www.afsfitness.com/system/js/tiny_mce/plugins/image/uploads/roundtable_for_web2.png |

**TOPICAL DISCUSSION (or Round Table)**

**TIME: 20 – 30 minutes**

Can be scheduled or impromptu. If scheduled, it may be helpful for members to do some research in advance or bring information with them to support the discussion.

Topic is in the explored by everyone, we openly discuss and generate ideas towards the TOPIC not an individual member.

MODERATOR INSTRUCTIONS:

1. Assign someone to introduce the topic and set the boundaries for the discussion
2. Ask timekeeper to set 20 minutes
3. Ensure everyone has a chance to speak
4. Keep the conversation focused on topic
5. Don’t let two people ‘debate’ – generate new ideas, not try to agree on best one(s).

**LIGHTNING ROUND**

**TIME: 5 minutes**

A simple question or ‘poll’ where a member seeks everyone’s input to hear about something specific. It can add speed and energy to have members stand as they speak.

*LIGHTNING ROUND con’t*

MODERATOR INSTRUCTIONS:

1. The member asks their specific question ie*. Do you lease or buy your personal vehicles? How much emergency cash do you keep on hand?*
2. Allow each member up to 30 seconds to answer the question going in order around the table.

**EXTERNAL EXPERT**

**TIME: ~60 minutes, 15 min. present, 45 min. Q&A**

Questions arise where experience from an expert is very valuable. Identify and invite a credible expert resource to the meeting. A single point of contact from the group is best, with clear expectations provided in advance to the expert.

MODERATOR INSTRUCTIONS:

1. Identify a topic that members are interested in and known expert available (IE: financial planning, tax planning, executive comp, child psychologist, employment law, ESOP plans, etc.)
2. Contact the expert to prepare them with specific questions to address, as well as confidentiality, no-solicitation and general information regarding the group
3. Introduce the speaker and set a timer for 15 minutes
4. When the expert is finished speaking, facilitate Q & A session. Detailed or specific questions take offline, lively conversation keeps everyone engaged
5. Debrief, with experience share, if useful.

**INTERNAL EXPERT**

**TIME: ~30 minutes, 15 min. present, 15 min. Q&A**

A member of your forum or chapter may have relevant and deep expertise to share on a specific topic. Or, they may have recently learned something where sharing the knowledge with the forum is valuable to several members.

*INTERNAL EXPERT con’t*

MODERATOR INSTRUCTIONS:

1. Invite the member to present when prepared, either now or a future meeting (planned or impromptu)
2. When planned, consider if it would be useful to meet at their location
3. Set timer for agreed to length (10-15 min)
4. Set timer again for Q & A (10 – 20 min)
5. Moderate the Q & A as needed
6. Debrief, with experience share, if useful.

**WRITTEN EXPERT – Book, Article, Blog**

**TIME: 5 - 10 minutes**

When a topic is raised or a member finds a resource many in the forum would learn from.

MODERATOR INSTRUCTIONS:

1. Agree on format – one person to summarize and report or everyone to read/view and bring their thoughts
2. If a presentation by one member – maximum of 5 minutes and then Q & A.
3. If everyone reviews, ask each member to share their take away or questions
4. Short video –watch together and discuss

(Some materials may be online reference)

**I WONDER | BLIND WINDOW**

**TIME: 15 minutes**

A forum member requests this when they are concerned that they may be missing something important about a decision, situation or challenge. They may request specific or general feedback.

MODERATOR INSTRUCTIONS

1. Member presents summary or key points of the situation for up to 5 minutes (use timer)
2. Set timer for further 7 to 10 minutes
3. The Member turns away, with their back to the group, to listen and take notes as group ‘wonders’ what the member might be blind to or has not yet considered
4. Ensure that everyone, that wants to, has a turn to contribute

*I WONDER | BLIND WINDOW con’t*

1. IMPORTANT: no judgment. Group stays in a curious and non- judgmental mindset
2. Invite the member back to the circle and thank the group for their thoughts.

**HIDDEN WINDOW – I WANT TO SHARE**

**TIME: 10 - 15 minutes**

A forum member wants to share openly, talk it out, inform the group without feedback. This process allows the member to inform the group or provide information beyond what they have shared in their update

MODERATOR INSTRUCTIONS

1. Set timer for the amount of time the member requests or estimates – (up to 15 minutes)
2. Member speaks, uninterrupted
3. Thank them for their story, and confirm they don’t want experiences to be shared
4. Confirm the level of confidentiality - is this information level 2 or “Attila the Hun” where no one will ever raise the topic again with the member or basic level of confidentiality.

**GOAL | ACCOUNTABIILITY UPDATE**

**TIME: 8-10 minutes**

When goal setting is part of forum, each member may report in a written format (online if preferred) with time for challenges or celebration. Offline reporting or partners are a best practice.

MODERATOR INSTRUCTIONS

1. Forum agrees on timing, method and accountabilities for goal reporting
2. If meeting time is used, allow each member equal time to report or update
3. If a member is struggling, ask if there is a presentation or other way to gain support
4. Celebrate the wins – get clear on underlying struggles.

**BRAINSTORMING** – full page description: Brainstorming REFERENCE.