

SESSION FORMATS

Buzz Group (BG) consists of a large group of participants divided into small units, usually of no more than six participants each, meeting simultaneously. The purpose of the group is to react to a topic or a charge given to them. **Standard room set: head table & lectern for presenters, round tables & chairs for attendees.**

Interactive Forum (IF) is an actively moderated session that includes significant participation. **Standard room set: coffee table & chairs for presenters, chairs in a row for attendees.**

Lecture (L) is a formal presentation usually given by one expert. **Standard room set: head table & lectern for presenter(s), chairs in a row for attendees.**

Open Forum (OF) is a broad discussion of a topic with high levels of audience participation. **Standard room set: head table & lectern for presenters, chairs in a row for attendees.**

Panel Discussion (PD) consists of experts presenting specific topics with limited audience participation. **Standard room set: head table & lectern for presenters, chairs in a row for attendees.**

Teaching Session (TS) is a detailed, how-to approach to the stated subject matter conducted with a small group of participants. **Standard room set: head table & lectern for presenters, tables & chairs for attendees.**

Workshop (WS) is an informal discussion of a topic structured for a small group of participants. (Note: limited attendance 30-40). **Standard room set: Hollow Square or Conference – chairs set around tables for attendees.**

Buzz Groups

Buzz Groups consist of a large group of participants divided into small units, usually of no more than six participants each, meeting simultaneously. The purpose of the group is to react to a topic or a charge given to them.

Facilitator Tips:

1. Give clear directions regarding questions to be discussed, tasks to be performed, the sequence of these tasks, amount of time allowed, and how each group will report on its discussion and/or activities.
2. Consider the materials the groups may need, such as copies of case studies, paper and pencils, flipchart with markers, etc.
3. Move from table to table, checking that each group is clear about its task and is on target. Be available to coach the group when needed; some small groups will require personalized coaching from the facilitator in order to begin their work.
4. Consider using multiple facilitators when faced with numbers of buzz groups. These co-facilitators may be assigned to a specific group or they may be asked to be available to several groups.
5. Be knowledgeable about the questions/tasks under consideration by the buzz groups and at the same time be comfortable interacting with small groups, initiating discussion and handling questions.
6. Summation of the buzz groups' work is important so that the learning is made explicit. Design a strategy allowing each group to answer the question, "what did we learn?"

Interactive Forum

An **interactive forum** is an actively moderated session which includes significant audience discussion of the topic.

Facilitator Tips:

1. The key to this format is a strong moderator who actively invites and elicits attendee participation. A large portion of time is used for attendee reactions, comments, questions and discussion.
2. The facilitator's task is to set the stage for discussion through introduction of the topic and pertinent issues for discussion. The issues identified should be significant to actuarial practice problems, emerging trends, etc. Identification of the topics typically takes between 5 and 10 minutes.
3. We encourage the moderator to summarize the discussion for the attendees. The summary could include a brief restatement of the topics explored and their implications on actuarial practice. Summaries should begin a couple of minutes prior to the end of the session and not after the session time has elapsed.

Lecture

A **Lecture** is a formal presentation on a subject given before an audience.

Facilitator Tips:

1. The lecturer's ideas are the focus. The lecture needs tight logical structure and concrete examples to illustrate major ideas.
2. It is crucial that the lecturer structure the material with sensitivity to the experience and range of expertise of the audience. A helpful rule of thumb for audiences of mixed abilities and experience is the "20-60-20" rule. This rule states that with mixed-ability audiences, 20% of the material should be geared to an introductory level, 60% should be geared to an intermediate level of difficulty, and the remaining 20% of material should be geared to an advanced level of difficulty. This increases the likelihood of reaching the majority of attendees with useful ideas.
3. The lecturer must possess strong speaking skills, have the ability to articulate ideas publicly, be well-organized, attentive to participants and able to handle questions presented.
4. We encourage the lecturer to actively invite questions and discussion from the attendees. This often facilitates a deeper understanding of the ideas presented.

Open Forum

Open forums are designated when a broad discussion of a topic is appropriate. These sessions are usually structured to include substantial audience participation.

Facilitator Tips:

1. The moderator sets the topic agenda and initiates discussion through brief opening remarks of no more than 5 minutes. The opening remarks should be crisp and concise.
2. The moderator controls the pace and flow of the forum as needed, e.g., makes sure to allow time for all topics to be discussed, moves discussion past needless repetition, etc.
3. We encourage the moderator to have several issues/questions in mind at the start of the forum. A brief outline of suggested topics for discussion may be helpful for participants, as well as pre-readings and/or handouts, e.g., statistics, discussion questions, etc. Come prepared to initiate discussion. With preparation, the forum is likely to be a strong learning experience for attendees.
4. The moderator must be comfortable with public speaking and initiating/participating in public dialogue.

Panel Discussion

A **panel discussion** consists of experts presenting specific topics with limited audience participation.

Facilitator Tips:

1. The moderator's primary task is to coordinate the panel for a logical, coherent presentation of a topic. Communication among panel members is the key. The moderator sets the topic agenda and approach through introductory remarks. The moderator may provide transition remarks between presenters to support the logical flow of the presentation.
2. The moderator should provide a summation of remarks and facilitate questions of the panelists.
3. Panel discussions are frequently presented to large groups. Panelists should be comfortable in front of large groups.
4. Panelists should keep remarks tight and within a specified amount of time agreed upon by the panel.
5. Practice your remarks! The first run through should not be the public presentation at the SOA meeting. Practicing your remarks allow for smoother, more polished presentations, and helps to eliminate anxiety. Practice is important especially if the presenter is not experienced in using audio/visual equipment and/or handouts while speaking.
6. Attendee participation is generally limited to questions at the end of the panel discussion. Leaving time for questions is important in allowing attendees to deepen their understanding of the topic and in applying the information to their own practice.

Teaching Session

A **teaching session** consists of one or two experts with a how-to approach to the stated subject matter working with a relatively small group of participants.

Facilitator Tips:

1. This is a “how-to” session. Attendees seek to increase practice-related skills. It is important to note the level of difficulty for the session. Are the attendees beginners? Moderately experienced? Experts?
2. The skill or “how-to” for the teaching session must be precisely and clearly defined in terms of scope and applicability.
3. Consider carefully the structuring of the content and the time allowed. How much time is needed to demonstrate and explain a skill or approach?
4. An effective teaching session allows time for the attendees to understand the skill or approach, ask questions and receive guidance. The instructors have to plan and prepare the skill practices and “how-to” examples.
5. While attendees may learn in small groups or pairs, the instructors must work to ensure that individuals have the opportunity to learn the skill or approach.

Workshop

A workshop provides an opportunity for a more informal and detailed discussion of a topic and is structured for small groups. Workshop attendees should have some prior knowledge of the subject matter.

Facilitator Tips:

1. The role of the facilitator is crucial to the success of the workshop. Some thought must be given to the aim of the workshop. Is it a freewheeling, open discussion of attendee concerns? Is the workshop a follow-up to another session? (If so, how will topics for the workshop be determined?) Is the workshop devoted to a specific, particular topic? The facilitator must be clear about the workshop's intent from the beginning.
2. If the workshop is a follow-up, the facilitator should coordinate the workshop with the facilitator/moderator of the previous session.
3. The facilitator should select a topic agenda/focus for the workshop and be clear about the focus with attendees. This will assist in making the workshop productive for attendees.