



National Association
of Bond Lawyers

MEMORANDUM

To: NABL [CONFERENCE] Panelists

From: [CONFERENCE] Chair

Date:

Re: Responsibilities of Panelists

On behalf of the National Association of Bond Lawyers, I am writing to thank you for agreeing to serve as a panelist at the [CONFERENCE]. NABL recognizes that this is a significant time commitment on your part and we appreciate your participation in [CONFERENCE] and in making it a success.

To ensure that [CONFERENCE] is a success, it is important that each panelist understand his or her responsibilities. Even if you are a seasoned panelist and most likely aware of these responsibilities, it is a worthwhile endeavor to review the basic principles that will lead to the engaging discussion our membership expects (and pays for) at [CONFERENCE]. Set forth below is a summary of those responsibilities.

1. **Don't Overcommit.** Panelists generally should not serve on more than two different panel topics at [CONFERENCE] and should not teach at more than three or four panel sessions. The [CONFERENCE] Chair may grant exceptions under limited circumstances. If you are asked to serve as a panelist for more than one topic, please inform the respective chairs for those panels. This is necessary for scheduling purposes. If for any reason you cannot serve as a panelist for any session for which you are scheduled to serve, you should immediately notify the panel chair to explain the reason you need to cancel and, if requested to do so, you should assist the panel chair in finding a suitable replacement.

2. **Know Your Material.** Be familiar with your panel's subject matter. You should read the Blue Book [not applicable for The Institute] outline (the long outline) and the handout/speakers' outline for your panel. Bottom line, you should complete the preparation necessary to make sure you can contribute meaningfully to the discussion during your panel sessions.

3. **Participate in Planning Calls.** Your panel chair will schedule at least one conference call with members of the panel to prepare for your panel sessions. The purpose of these planning calls is for the panel chair to (a) review his or her expectations of each panelist, (b) review the goals and takeaways for the panel sessions, (c) review the information to be presented and the questions/hypotheticals to be discussed, (d) review the assignment of panelists to specific sessions, and (e) assign responsibility for different topics to specific panelists. You should participate in those calls if at all possible. After participating in these calls, you may want to outline points you wish to make and list the brief examples you can use to illustrate your points (e.g., by annotating your copy of the handout/speakers' outline). Determine 1 or 2 key messages that will be relevant to the audience for each discussion point and/or hypothetical that will be discussed. Also, as part of your preparation, think about what questions your audience members may have about the topic and plan to answer those questions.

4. **Panelist Guidelines.** Based on the experience of NABL members and feedback from seminar attendees over many years, NABL's Education and Member Services Committee has developed guidelines for panelists, which are attached as Appendix A. Please carefully review and follow these guidelines.

APPENDIX A

NABL PANELIST GUIDELINES

Serving as a panelist is a great opportunity to learn and to teach; however, being a bond lawyer doesn't mean that we necessarily know how to teach (at least not initially). Unfortunately, surveys of attendees at our seminars confirm that panelists make many of the same mistakes over time. Almost all of these mistakes can be avoided by a panelist who follows certain best practices. Based on the experience of NABL members and feedback from seminar attendees over many years, NABL's Education and Member Services Committee has developed the following guidelines for panelists.

1. **Speak into the Microphone.** This is probably the most common mistake made by panelists, one that is very frustrating for attendees and appears year after year in survey results. Attendees cannot learn if they cannot hear your presentation. Please be conscious of this and do your best to ensure everyone can hear you.

2. **Talk to the Audience, Not to the Moderator.** The moderator is asking the questions, but he or she is merely a proxy for the audience. When you answer, don't look at the moderator. Look at the audience. It is acceptable to look at one of the panelists when asking him or her a question, but then you should direct your attention back to the audience.

3. **Answering Questions.** You should attempt to answer questions posed by the moderator, other panelists and members of the audience as succinctly and clearly as possible. But you also should feel free to take the conversation in another direction for the audience's benefit. For example, it's okay to answer, "Yes, I think this is an issue, but the real issue that most of us face is _____," particularly in response to questions posed by the audience, if you believe this information will be helpful to the audience. Prior to answering, always repeat the questions asked from the audience; if there is no microphone, it's likely that everyone could not hear the question. Also, using examples and stories can be a terrific way to help your audience members relate to and understand what you are saying.

4. **Don't Dominate the Discussion.** Don't compete with the moderator or the other panelists for time or attention. It's not a discussion if one panelist dominates. Remember, it is the job of the panelists to work together to provide an interesting and meaningful panel discussion for the audience. Be conscious of the balance on the panel.

5. **Let Civility Be Your Guide.** Remember that one of the many benefits of NABL conferences is to hear the diversity of thoughts on many different areas of municipal bond practice and that this is best encouraged when panelists interact in a civil manner with the moderator, one another and members of the audience. Be aware of the flow of the panel discussion, sensitive to the mood of the audience, and unless you are the moderator, don't interrupt a panelist in the middle of his or her remarks.

6. **Be Engaged.** Be attentive and committed during the entire panel session. When you are not speaking, focus your attention as much as possible on the person who is speaking (the

moderator or another panelist). If you need to make notes or review some portion of the material before you speak (or speak next), do so without drawing more attention to yourself than necessary. Demonstrate an eagerness to participate in the discussion. Do not allow the audience to perceive that you are bored. If you appear bored, there's a good chance the audience members will quickly lose interest in your panel discussion. Avoid fidgeting, shuffling papers, texting and emailing during your panel session. Also, you should arrive at least 5 minutes prior to your session and not leave the panel session early (yes, this has happened in the past). If you cannot participate in the entire panel session, you should not participate in that session at all.

7. **Stand in Your Audience's Shoes.** As a panelist, be mindful of the audience's reasons for attending your panel session and give the audience what it wants. Your job is to work with the moderator and the other panelists to engage the audience and provide a panel that is interesting, useful, relevant and informative for your audience. Be the type of panelist that you admire and respect.

8. **Have Fun; Be Enthusiastic.** Being a panelist should be an enjoyable experience for you and your audience. To make the experience more enjoyable for you and the audience, be enthusiastic about the material you are presenting. If you are not enthusiastic about what you are presenting, it seems unfair to expect the audience to enjoy your presentation.