Career Navigator

How to Convene a Panel: Think of a Jazz Performance

By Sandra K. Masur

There may be times in your career when you have the opportunity to organize a panel. This could be around a special topic at a scientific meeting or within your own institution when you have a chance to organize a celebration of an idea, a movement, or a person and their work. Or you might want to highlight a challenging situation that might best be resolved by individuals with diverse points of view. As an organizer of a number of these events, I put together some guidelines and ideas that led to successful and engaging programs.

First, decide whether your event would benefit from a panel or would be just as good with a single keynote speaker. In jazz parlance, you are asking whether this event would be best as a solo performance (keynote) by an outstanding person who is both knowledgeable and an engaging speaker, or whether it would benefit from various voices, as in a jazz trio (panel).

I recommend that you choose the panel format when the topic would benefit from multiple perspectives. For example, you may want to celebrate the life of an amazing scientist who, in addition to doing ground-breaking scientific work, was a great mentor and advisor and also an activist in gender equity. Similarly, you might want to use this format to present multiple techniques that can be used to interrogate a biological system.

Although the suggestions below can apply to many situations, I will give examples primarily related to a celebratory panel. A panel of diverse individuals who can each speak from their own vantage point will better highlight the diverse aspects of the celebrated individual’s contributions.

Recruiting a Diverse Organizing Committee

At least three to four months before your proposed event, bring together a group to brainstorm the program and decide upon whom to invite as panelists. There is strong evidence in the literature that diverse groups generate more creative programs, so be inclusive from the beginning. For example, if you are planning to highlight advocacy for gender equity, your planning should go beyond inclusion of binary male and female genders and include planners and insights from the LGBTQ+ community. After all, you wouldn’t want a trio consisting only of drummers!

Generate a list of candidate panelists and characterize their viewpoint, community, and expertise. Names that receive multiple nominations should rise to the top of the list. When possible, watch videos of their presentations, aiming for people who are thoughtful and articulate as public speakers.

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It’s good to have a planning partner for all the next steps. If you don’t have one at the start, the committee you just created is often a great source of a co-chair. This person can share the tasks/responsibilities, act as a sounding board, and will benefit from your mentoring if they are more junior in their career.

Recruiting Panel Members

An often useful approach is to first invite that person on your list who is considered to be a “star”—someone who is recognized by the audience you want to attract because they are an outstanding scientist, or are known for activism.

Once you have your star as an anchor, you can more easily recruit the next person on your list. By working down the list, one person at a time, you can continue to build a diverse panel, especially if you choose as the next invitee someone who is different from the previous one. In this case, “different” could refer to gender, career status, training discipline, country of origin—again, bringing together diverse people whose perspectives will enrich the information to be shared.

Preparing the Program in Collaboration with the Panel Members

I strongly recommend that you now engage the panelists in generating the final program. You can do this through a conference call one to two months before the event.

In addition to sharing your vision for the event, this approach has several advantages: 1) you have the benefit of their expertise; 2) the call allows them to meet each other over the phone (if they have not yet met) and to learn about one another’s expertise and style; and 3) they can become familiar and comfortable with the proposed material. In the jazz metaphor, this helps prepare them for a smooth performance where each can take turns at solos.

This is also the time to ask each panelist what topics they think would be important to discuss. Based on their answers, the organizers can draft questions that the moderator (often one of the organizers) will ask each panelist. This format will both frame the discussion and highlight the unique perspective of each panelist. Placing the draft in a shared Google document makes it easily accessible to all.

You should schedule a second conference call at least two weeks before the event to elicit feedback on the drafted questions and to allow time for potential modification. It’s also an opportunity to ask each member to indicate whether there are some additional topics or anecdotes they would like the moderator to elicit. As a result of the second call, the scripted questions are refined and sent to the panelists. It’s also a good idea to provide all panelists a script of the event, including the questions each will be asked by the moderator. This is the musical arrangement that provides structure without inhibiting improvisation by the individuals in the group. In my experience, this approach is remarkably effective in generating a harmonious presentation with the potential of hearing a variety of voices clearly.

This second conference call is also the time to address issues of logistics, including when the panelists would arrive; whether they will stay for dinner; transportation; hotel accommodations; and people with whom they might want to meet while on your campus.
Planning the Events Surrounding the Panel

As with organizing any special event, you need to identify and engage staff who regularly put together public events at your institution early in the process (three to four months before the event). In our case, they helped us think about the time of day of the event so as to best accommodate a reception afterward that would keep the conversation going. They also helped us plan the food and drinks (including alcohol), and importantly, the financing. These people know the key resources and challenges, such as identifying an auditorium that has an adjacent reception area. They will also be able to advise on whether the venue has a podium, stage, and a table for the panelists. They usually know which publicity tools are most effective, such as posters, emails, evites, and RSVPs. Your younger colleagues may be especially adept at using social media, so get one on the organizing committee for publicity as well.

Audiovisual specialists are essential for making the event go smoothly. They can advise on requirements for PowerPoint and videos, and compatibility with their projectors; can set up microphones for panelists and the audience; and can place a teleprompter in front of the panelists so they can easily track the timing and flow of the event.

Funding the Event

As you recruit panelists, your budget will depend on who is “local,” defined as a drive or train ride away, and who will require airfare and hotel accommodations. There may be honoraria involved (or perhaps not, if they are friends of the celebrated person). A small budget will be necessary for posters, but Internet-based publicity is free. In addition to the reception afterward, a dinner for the panelists (plus one guest each) is a lovely way to thank them and prolong their connection. If the person who was honored is still living, by all means they should be at the dinner. If they are deceased, perhaps a surviving spouse or partner could join the group.

Identifying multiple sources for financing not only makes it easier to fund the event, it also engages a diverse group of sponsors who are now likely to attend and add to the event. Your funding could be institutional (budgets for speakers from departments, institutes, programs, named awards, and professional organizations). You should have a realistic budget in hand prior to inviting the full panel.

When this all comes together, you will find that the panel has made people think in new ways and see new connections. This will be confirmed by the exciting buzz of conversation in the reception and even afterwards, perhaps as late as "Round Midnight."

Reference and Footnote


2"Round Midnight is a classic jazz tune by the Thelonious Monk Quartet

About the Author

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