



How to Plan a Roundtable Policy Discussion: A Step-by-Step Guide

Introduction: A roundtable policy discussion is a valuable forum for in-depth conversations on critical issues. Whether you're an organization, government agency, or an individual, planning an effective roundtable can foster informed debate and lead to informed policy decisions. This guide will walk you through the steps to plan a successful roundtable policy discussion.

Step 1: Define the Purpose and Scope

- Clearly state the purpose and objectives of the roundtable.
- Determine the specific policy issue or topic you want to address.
- Identify your target audience and stakeholders.

Step 2: Assemble a Team

- Create a planning team with diverse expertise.
- Assign roles and responsibilities for organizing the event.
- Ensure you have individuals with policy knowledge, event planning skills, and communication expertise.

Step 3: Set a Date and Location

- Choose a date that accommodates key participants' schedules.
- Select an accessible and suitable venue for the roundtable.
- Ensure the location is equipped with necessary technology and facilities.

Step 4: Develop the Guest List

- Identify and invite key stakeholders, experts, policymakers, and influencers.
- Consider inclusivity, ensuring diverse perspectives.
- Send out invitations well in advance and follow up as necessary.

Step 5: Prepare Background Materials

- Collect relevant research, data, and reports on the policy issue.
- Create a discussion guide or agenda to structure the conversation.
- Share the materials with participants before the event.

Step 6: Structure the Agenda

- Design a clear agenda with specific time slots for each segment.
- Include welcome remarks, presentations, panel discussions, and Q&A sessions.
- Allow for networking breaks and a structured wrap-up.

Step 7: Secure Speakers and Moderators

- Identify experts, policymakers, and thought leaders to present and moderate.
- Ensure your speakers have a deep understanding of the topic.
- Provide clear guidelines and expectations to speakers and moderators.

Step 8: Facilitate Engagement

- Encourage open dialogue and diverse viewpoints.
- Use interactive tools like polls, audience questions, and breakout sessions.
- Allocate time for audience participation and feedback.

Step 9: Document the Discussion

- Record the roundtable through audio or video.
- Assign someone to take detailed notes.
- Consider live-streaming or reporting to reach a wider audience.

Step 10: Follow-Up and Action Steps

- Share post-event summaries, key takeaways, and any commitments made.
- Encourage participants to collaborate and continue the conversation.
- Consider publishing a policy brief or report based on the discussion.

Conclusion: Planning a roundtable policy discussion can be a catalyst for informed policy decisions and positive change. By following these steps and carefully organizing your event, you can create a productive and engaging forum for critical discussions and foster collaboration among stakeholders. Remember, the success of a roundtable largely depends on thorough preparation and effective facilitation.



Planning Checklist

- ___ Date, Time of Event & Expected # of guests
- ___ Venue– Size, Cost, Availability, UUF
- ___ Budget? Budget #, Project Name, Who pays?
- ___ Format — Speaker? Townhall, Roundtable? If it's a roundtable, who invites participants? Who is the moderator and who manages the program? (Stage manager?)
- ___ Speaker/Table needs
- ___ Audio/Video—In house, or hire out?
- ___ US Flag?
- ___ Décor – Banners? Table runners? Media Backdrop?
- ___ Reception—Food? Beverages? Budget? Alcohol permit?
- ___ Directional Signage, A Frames, Posters, Easels & who designs?
- ___ Help needed? Greeters? Set up? Directional help in garage?
- ___ Who is hosting? Who is Main Contact?
- ___ Who makes the guest list? Who sends out invitations?
- ___ Registration? Call in, or web? RSVPs—Who receives?
- ___ Parking Needs. How many spots, who pays, who provides passes?
- ___ Guest Registration Table- Guest List? Nametags needed? Packets?
- ___ Who is the contact/host for invited guests?
- ___ Reserved seats needed? Seating Chart?
- ___ Who are the speakers? Is there a moderator? Who's writing the program?
- ___ Who creates & manages the program?

