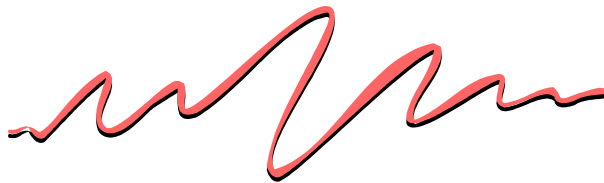


PLANNING EXTRAORDINARY EDUCATION AND TRAINING PROGRAMS



December 2005



Alliance of the Ports of Canada, the Caribbean, Latin America and the United States

**American Association of Port Authorities
1010 Duke Street, Alexandria, VA 22314**

www.aapa-ports.org

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FACILITATING COMMITTEE MEETINGS THAT GET RESULTS

OBJECTIVE

Committees will be challenged to create new possibilities for AAPA seminars using some simple tools. We have optimistic goals for future AAPA seminars:

- People will leave with tools/things they can put into practice back in their offices.
- Excite people in the audience. Find out what AAPA members are interested in and provide this at the seminars.
- “Pleasantly surprise” those attending. Entice them into learning and engagement.
- Enable people to reflect on “how do you leave here and do it?”
- Information from the seminars will be made available on the web.
- Provide follow-up learning opportunities where appropriate:
 - People making commitments for action on a certain issue;
 - Projects such as studies, etc., could result from collaborative learning;
 - Participants could commit to regular follow up discussions on an important topic through regular conference calls or e-community forum participation.

Committee leadership can achieve these results by facilitating meetings that will empower members and accomplish the bulk of the seminar planning taken care of at the meeting.

BACKGROUND

For many years, AAPA has produced education and training programs for the port industry. It is AAPA Projects & Publications Committee policy that these programs meet the dual objectives of providing quality education and training to port professionals as well as serving as a significant revenue source to the Association.

AAPA technical committees take the lead in the process of developing programs with the assistance of AAPA staff. We greatly appreciate the efforts of our technical committees and we hope this model results in the most effective use of our volunteers’ valuable time.

Professional development and education was recognized as one of the Association’s key goals in AAPA’s strategic plan. Consistent with the implementation of this plan, we are offering this model so that our programs continue to function at a level consistent with the high expectations of the AAPA membership.

LOGISTICS AND PLANNING CONSIDERATIONS

The focus of committee members involved in the process of organizing a program should center around four primary elements:

- **Set Goals**
- **Develop Learning Objectives**
- **Design Sessions**
- **Enlist Speakers/Moderators**

A secondary focus of committee members might involve:

- **Providing referrals or assisting staff in efforts to obtain event sponsorship for the program**
- **Offering suggestions on marketing to special nonmember attendee prospects**

Committee members will come to appreciate the benefits of meeting the planning timelines outlined here. A timely outline of the agenda and early commitments from speakers will help in marketing the seminar by providing information to potential registrants. An early commitment by a speaker also will allow time for AAPA to assist with the presentation. With adequate lead-time AAPA's Membership Services can better prepare biographical information for introductions, reproduce speaker remarks, and obtain needed audio/visual equipment. The expertise of AAPA's headquarters staff is always available to help technical committees produce a first-rate program.

TIMELINE FOR SEMINAR ACTIVITIES

A Year Ahead (every July prior to finalizing the AAPA Education and Training Program schedule):

- Membership Services to conduct a meeting with all AAPA Committee staff liaisons to discuss the Education and Training programs for the coming year
- Membership Services to outline the training schedule for the coming year
- Staff Liaisons, after consulting with committee, to give guidance on the format for their seminar (e.g., goals, format, etc.)

5 or More Months Out:

- Staff liaison to meet with Membership Services and Committee Chairman to discuss program.
 - Review evaluations from preceding seminar;
 - Discuss agenda;
 - Review space needs;
 - Discuss marketing needs; and
 - Identify goals/objectives of the seminar to be used for the After-Action Review (planning sheet attached).

- Following this meeting the committee chairman plan a committee meeting or conference call to identify learning objectives, design sessions, select speakers/moderators according to the attached planning guide. Moderators willing to take charge of specific panels should be identified.

4 or More Months Out:

- Moderators should begin to provide AAPA staff liaison with speaker contact information so that formal invitation/confirmations can be rendered.
- At this point in the process, there should be sufficient information to circulate a basic agenda with topics and possibly list some speakers. This agenda is used by Membership Services to send an initial marketing mailing.
- Committee chairmen should provide speakers/moderators with an outline of the session and the committee's expectations.
- Moderator and speaker guidelines should be distributed by Membership Services to those agreeing to speak at the seminar.

2 or More Months Out:

- At least 2/3 of speakers should be confirmed by the Committee at this point
- A conference call should be organized by moderators with participants in each session to outline the session and give the speakers an opportunity to coordinate their remarks

5 or More Weeks Out:

- Agenda should be completed by the Committee at this point with all speakers confirmed

4 or More Weeks Out:

- Speakers should be confirmed by committee

3 Weeks Out:

- Staff liaisons would organize a conference call with Chairman and Membership Services to discuss final details for seminar (logistics issues, etc.)
- Room block cut-off
- Speaker remarks should be forwarded to Membership Services

2 Weeks Out:

- Committee Chairman should remind Moderator to finalize plans with the speakers on his/her session
- Confirmations sent out to all conference participants by Membership Services

1 Week Out:

- Any remaining speaker remarks should be forwarded to AAPA

1-2 Weeks Post:

- Membership Services sends out thank you letters to speakers/moderators
- Electronic evaluation to be sent out to participants by Membership Services
- Committee, staff liaison and Membership Services should complete After Action Review to evaluate seminar.

ROLE DESCRIPTIONS

Membership Services

AAPA's Membership Services department supports both the Committee leadership and staff liaisons in handling all aspects of the logistics for a seminar. It works closely with the Projects and Publications Committee in establishing the seminar schedule and the length of a seminar or workshop. After the schedule is determined, hotels are selected at each host port and a printed training schedule is developed and issued to all AAPA members. Once speakers and moderators are selected, Membership Services sends confirmation letters and guidelines asking for AV, biographical information and presentations in advance of the event. Membership Services also handles all marketing and sponsorship solicitation with the help and input of the Committees and host ports.

Committee Chairman & Vice Chairman

The role of the two committee leaders should be one of leadership and oversight, primarily making sure that committee members are aware of the responsibilities involved in developing and carrying out a substantive seminar agenda. These leaders should focus committee efforts around a strategic direction using the seminar planning model attached. The Chair and Vice Chair should lead the committee in an exercise to develop the seminar. Once the seminar is designed, the leaders should provide oversight to the committee and aid in lining up speakers and moderators for the sessions (see Planning Guide). It is important that the Chairman and Vice Chairman communicate closely with the AAPA staff liaison and be available to respond to program-related issues as they arise. The registration fee will be waived for committee chairmen attending their committee's seminar.

Committee Members

Committee members are instrumental in setting the goals, developing learning objectives and designing the seminar. They also will be instrumental in identifying or acting as speakers and moderators for the sessions (see Planning Guide). Members should work with AAPA staff to assure that speakers and moderators are informed about their specific roles.

Staff Liaisons

Staff liaisons are the intermediaries between AAPA Membership Services and the committee members. It is important that the liaisons be aware of the wishes of the committee with regard to the seminar program and also be familiar with the subject matter so that they can assist the committee in an enlightened fashion. They will assist the Chair and Vice Chair in implementing the planning model.

Host Port

Typically, AAPA programs are conducted in the cities of our member port authorities. This provides our members with opportunities to see other ports and learn how these ports are dealing with critical industry challenges. It also benefits the host port city as it brings money to the local economy.

Locations for AAPA programs are selected based on several factors. It is important that a location be reasonably accessible to potential attendees from throughout the Hemisphere (adequate airline service, etc.). Generally, AAPA's regularly recurring programs are informally moved around from year to year among the various regions and delegations. In addition, within an individual activity year, AAPA endeavors to spread its programs among the regions/ delegations. Within the above parameters, AAPA seeks to accommodate technical committee recommendations on program locations, as well as expressions of interest from prospective host ports to the extent possible.

Typically a Host Port will:

- Recommend local hotels
- Provide a welcome reception for seminar participants and their spouses and guests
- Offer a port tour if participants are interested. (This may be included as part of the reception or can be held after the seminar ends.)
- Contact local companies who may be willing to sponsor an event at the seminar
- Supply mailing lists for local or regional groups that may be interested in attending the seminar
- Help secure local speakers for the program
- Submit an article about the seminar to your local newsletter or magazine

Speakers

After the initial contact by the moderator/facilitator or session leader, speakers are contacted by AAPA Membership Services with a confirmation letter and are provided the one-page "Speaker Guidelines" (attached in Section III) which contain pertinent information regarding their role. Speakers are asked by membership services to provide a short biography, audio-visual requirements and a copy of their presentation. As indicated in the Speaker Guidelines (attached), speakers generally are responsible for their own expenses, and pay the registration fee if attending the full program. Exceptions are occasionally made in extenuating circumstances at the discretion of AAPA's President.

Moderators

Moderators/facilitators are also contacted by AAPA Membership Services with a confirmation letter and are provided the one-page Moderator Guidelines (attached) which contain pertinent information regarding their role. Moderators/facilitators should communicate with each of their speakers in advance of the seminar to coordinate the overall session. Moderators/facilitators introduce each of the speakers in their session, using the brief biography that will be supplied to them by AAPA staff (Membership Services). Moderators/facilitators are expected to facilitate discussion among speakers, field questions from the audience and keep the panel within the appropriate time frame. As indicated in the Speaker Guidelines, speakers generally are responsible for their own expenses, and pay the registration fee if attending the full program. Exceptions are occasionally made in extenuating circumstances at the discretion of AAPA's President.

Sponsors

Sponsored receptions and tours provide excellent forums to allow attendees to meet industry colleagues and expand their network of industry contacts. This is a very important element of AAPA's Education & Training programs. It is not uncommon for individuals to make career-long contacts with colleagues they meet at AAPA events. Sponsors choose their level of contribution through selection of the function they wish to sponsor. AAPA's Membership Services department handles all sponsorship referrals.

MARKETING PLAN

The marketing function is primarily the responsibility of the AAPA staff, although as noted earlier, committee member suggestions for non-member target audiences are encouraged. Starting almost a year in advance, research begins on: potential host ports, hotel properties and meeting dates. Contracts are negotiated to produce optimum conditions in terms of lodging rates, meeting rooms and costs associated with food, beverage and A/V.

Marketing efforts are targeted to all classifications of AAPA members as well as appropriate non-members. Our traditional education and training brochure is made available at the Annual Convention and is also sent out following the convention, usually in October, and it marks the beginning of the marketing efforts for the coming meeting year. No later than three months before each meeting (earlier if possible), direct mail with information on specific meetings is forwarded to members, with special attention given to specific technical committees, PPM candidates and other target markets.

AAPA's database allows us to capture and sort a range of member criteria such as functional responsibility, past meeting activity, committee activity, association leadership positions and many other potential market segments. In addition, AAPA has seen success using the AAPA web site as a vehicle for sourcing meeting registrants.

Broadcast e-mails have brought information on AAPA events to the workstations of port leaders throughout the world. AAPA will continue to be creative in its marketing efforts, aggressively using technology to inform ports and the port service industry about our education and training programs.

Finally, any referrals given to AAPA by Committee members or host ports will be contacted through our marketing efforts. If other organizations are interested in supporting our marketing efforts we can give their members AAPA's member rate.

MARKETING TIMELINE

July-August (New Fiscal Year):

- Seminar locations are determined by AAPA, then Membership Services negotiates and signs agreements with hotel properties and sets the overall schedule for the upcoming fiscal year

September:

- Education and Training Programs brochure for the coming calendar year goes to press in order to be available at annual convention

October:

- Marketing efforts begin for the upcoming calendar year – program brochure mailed to the membership
- Brochure is translated and distributed to Latin American Delegation

3 or More Months Out:

- Membership Services holds a conference call with committee chairmen, host port, and committee liaison to identify marketing needs
- Membership Services receives first draft agenda from committee. First promotional mailing is sent to member contacts, PPM[®] candidates, committee members, past participants and other target markets. This mailing typically includes draft agenda listing topics, flyer, and registration form.
- All materials translated and distributed to Latin American Delegation
- Initial meeting announcement in the *Advisory*
- Confirmations go out to moderators
- Confirmation letters go out to speakers as they are selected

2 or More Months Out:

- Additional promotional mailings and e-mails are sent
- 2/3 of speakers should be confirmed at this point

5 Weeks Out:

- Members are advised of approaching room block deadline via *Advisory* and email

4 Weeks Out:

- Final marketing messages sent by email

3 Weeks Out:

- Hotel room block typically expires

2 Weeks Out:

- Confirmation letters are emailed to all attendees
- Final arrangements made with hotel and host port

1 Week Out:

- Meeting material printed by staff and shipped to meeting site

AAPA SEMINAR FRAMEWORK

SEMINAR PLANNING OBJECTIVES AND MODELS

This new framework for designing seminars will allow more flexibility in the planning process to develop dynamic and innovative sessions. It also simplifies the process and helps committees develop extraordinary AAPA programs.

GROUP DISCUSSION

The Committee Chairman should engage committee members in a discussion that will inspire individuals to think creatively about the direction the seminar should take. Here are some sample questions that can be used to break the ice and engage committee members in conversation. Keep this part of the discussion broad — like a brainstorming session. (*See attached Committee Group Discussion Template (#1) to be used to track discussions.*)

- What is happening in the industry that is new and exciting?
- What are some new industry solutions or best practices that are transforming the industry?
- What are some tools/studies/best practices we can share with others that can make their jobs easier or ports more efficient?
- What are other industries doing that could be used as a model in the port industry?
- What most excites you about your job? What would you like to know more about?
- What are the possibilities that this seminar could create for others?
- What could you share that might be an inspiration to others at this seminar?
- What would make this seminar even more successful?

ENGAGE COMMITTEES TO SET GOALS

The goals are a statement of the overall anticipated outcome of the seminar, such as:

- The learning objective (a learning outcome from the student's/participant's perspective). This particular objective might be accomplished by breaking the committee into small groups and asking each group to develop the learning objective for the seminar and then have them report out. Give them only 10 minutes for this exercise and another 5 minutes to report out.
- Number of participants.
- Involvement of international partners/members.
- A list of possible participants/partners who could become involved as speakers or attendees.

SESSION DEVELOPMENT

After discussing goals, the Chairman should have the committee break into small groups and ask each group to develop/design a session for the seminar, write a description of this session and come up with a list of speakers (depending on the size of the meeting, each group may have to design more than one session). There are eight AAPA session designs that can be used as models, however ideas do not have to be limited to these. Keep in mind that most seminars are 2 or 2½ days long, so you will need enough sessions to fill the time allotment. If you are unclear as to the length of your seminar, check with your staff liaison. (*See attached Seminar Session Development Template (#2) to aid in tracking discussions.*)

A. LEARNING OBJECTIVES/DESCRIPTION

First, ask the committee to come up with the learning objective for this panel session and a description of what the session has to offer. For example:

Session 1 – Security and Trade Growth Are Transforming Supply Chain Business Practices. *You must meet the needs of increased trade through America’s ports. That will require better infrastructure, security and logistics to move that trade inland. Be part of the discussion about the future of the supply chain.*

Session 2 – Operations and Safety Pay When It Comes to Accessing Affordable Insurance. *Port operations significantly impact insurance costs and ports should be looking at innovative ways to manage their liabilities. Other factors, such as the events of September 11, have also made it difficult for ports to get certain coverage. This session will prepare you to face these new challenges.*

B. SESSION DESIGN

Based on this list of session models, the Chairman should have each team pick a style and develop a session using a model. (You can distribute the list of model sessions to each group so they have something to work from. They can use a traditional style, tweak one of the models, or create their own style). To ensure that there is no duplication of efforts, go around the room (after about five minutes) and have each group describe the model they plan to incorporate. List these on an outline so you have a general sketch of the seminar. Remember, the goal is not to redesign every training seminar but to add several dynamic sessions in addition to the more traditional panels.

■ **Model 1 – Single speaker session.** This can be used as the keynote speaker or for a dynamic presentation from a speaker who is an expert on a particular topic. An individual speaker should be used to energize the participants about the industry or a particular topic. He/she should be given some direction on the goal/learning objectives of the seminar and how the participants will benefit from the seminar.

■ **Model 2 – Traditional Panel.** One moderator and three speakers. This is the style used most often at AAPA seminars. The moderator introduces each speaker and gives them 15 – 20 minutes each to make their presentation. After the last speaker completes his/her remarks, the moderator will ask the audience if they have any questions for the speakers.

■ **Model 3 – Traditional Panel with Facilitated Q&A.** One moderator and 2 or 3 speakers. The moderator in this session should state the message of the panel (in one minute) and the message of each speaker during his/her introduction. Each speaker should be given no more than 7-10 minutes to describe their topic. After the speakers are finished, the moderator turns to the audience and gives them three minutes to write down questions on a card. Cards are collected and the moderator engages the speaker in a conversation using the questions. After the Q&A, the moderator takes a few minutes (no more than five) to summarize the message of the panel and a sentence or two describing the key message of the speaker(s). This style panel can also be done without a facilitated Q&A.

■ **Model 4 – Traditional Panel with Speakers and Audience Participation.** This model features one moderator and two or three speakers with facilitated audience participation in between each speaker. The audience will be sitting at round tables. The moderator in this session should state the message of the panel (in one minute) and the message of each speaker during his/her introduction. Each speaker should be given no more than 7-10 minutes to describe their topic. The moderator announces the message of the panel in the first three minutes and tells the audience that in between each speaker there will be a quick audience exercise to gather additional input on the topic. The committee should develop the questions they want to ask the audience. (For example, if the panel session is on methods for dealing with crisis communication, the moderator may turn to the audience and ask what are other methods not discussed by the speaker that have worked successfully in your port/business.) The moderator will ask each table to designate a “reporter,” give the audience three minutes to answer the question, and then one minute for each table to make a presentation.

■ **Model 5 – Workshop.** A workshop can be designed to provide participants with special skills training in a particular area or used as a tool to gather information from participants to address industry challenges. They can be designed by the committee, or an expert in the field can be identified to develop the training. When using this model it is critical that the facilitator is carefully chosen since this person is responsible for running the session at the seminar. (*Samples attached*)

■ **Model 6 – Socratic Dialogue.** This is an excellent tool for teaching participants how to deal with a port crisis or challenge using a hypothetical situation. These have been conducted successfully at several AAPA conventions and seminars. (*Sample attached*)

■ **Model 7 – Table-Top Exercise.** This is an excellent tool for teaching a group how to address challenges or hypothetical situations in a hands-on real-time setting. It gives professionals a chance to test their skills and learn new techniques for addressing common port/business challenges. These have been conducted successfully at several AAPA seminars and one-day workshops. For example, a very successful table-top exercise was conducted with the AAPA Public Relations Committee in the area of crisis communications. A scenario was developed to instruct PR professionals how to deal with a port emergency that would draw tremendous media attention. The scenario was unfolded “real-time” and participants (broken into small groups) had to react as if the scenario was happening in their own port. The morning was spent reacting to the scenario and the afternoon was spent debriefing and reviewing the learning objectives.

If the committee chooses this learning model, there are a number of ways that it can be developed. The committee could partner with an expert to develop the scenario and set up the session, the committee could solicit interest from sustaining members or outside groups to develop this session, or the committee could work with AAPA to hire an expert to develop the exercise (in this case consideration must be given to finding the funds to pay the expert).

■ **Model 8 – Facilitated Discussion of Hypothetical.** This format has been successfully used in Legal Issues seminars and is an exercise in issue/problem identification. A discussion leader and one or two panelists typically engage in an open discussion of potential legal problems arising from a factual situation, with active audience participation. A hypothetical on port development used early in a seminar program can lead to the identification of issues that will be addressed in greater detail in subsequent sessions. (*Sample attached*)

C. IDENTIFY SPEAKERS/MODERATORS/FACILITATOR

Once the sessions have been designed, committees must identify potential speakers and moderators/facilitators. Have each group decide who will take the lead for contacting these speakers and establish a deadline date. All speakers should be confirmed no later than three weeks before the seminar, when the hotel room block expires. The liaison should keep a record of the commitments. Provide each committee member with a list of the committee, moderator and speaker guidelines at the meeting. AAPA Membership Services staff will send out moderator and speaker guidelines to those who agree to fill these roles. Note that these guidelines are broad, and more specific information must be given to participants when using one of the dynamic session models listed above. It is helpful in these situations to develop a script or “storyboard” to be given to the participants. (A sample storyboard can be provided by your committee liaison.)

SAMPLES OF WORKSHOP FORMATS (Model 5)

Workshop I: **Considering Port Activities From a Watershed or Regional Perspective**

Purpose of the Session: To highlight successful partnership efforts that leverage the assets of diverse organizations to accomplish extraordinary environmental, economic and social benefits. Specific examples will be provided related to regional sediment management, wetlands mitigation banks, and air quality trading.

Format: Speakers will make presentations in 10 minutes or less highlighting their successful partnership efforts to leverage assets of diverse organizations to accomplish environmental benefits. The audience will also hear about new watershed policies that will make it increasingly difficult to manage individual projects. After the speakers give their presentations, the moderator of the session will review three areas of watershed policy regarding planning, information collection and dissemination and management and funding and then turn to the audience and ask them to work in small groups to answers some questions in each area. Answers to questions are to be recorded on the index cards on the table. After each series of questions, the facilitator will ask for volunteers to report their answers. Cards will be collected at the end of the session.

9:45 – 10:30 — Speaker Presentations and Question and Answer

Moderator, three speakers

10:30 – 10:45 – BREAK

10:45 – 10:50 – Overview of Planning Issues (A speaker or the moderator will address)

10:50 – 11:00 – Moderator asks audience to work in small groups to answer the following questions with regard to planning issues:

1. How does planning for your individual projects fit with the overall watershed planning structure?
2. How are these watershed planning policies going to affect your business?
3. How will you brief the leadership of your port about these changes?

11:00 – 11:05 – Moderator asks small groups to take five minutes and propose one way that AAPA can help its port members address these new watershed planning policies.

11:05 – 11:10 – Report out – Moderator asks for volunteers to run through the answers to their questions and their proposal for how AAPA can help ports address this issue.

11:10 – 11:15 – Overview of Information Collection and Dissemination – How do we make sure data is used as widely as possible—ports are getting the information they need and ports are sharing the information and data that they have collected. (A speaker or the moderator will address.)

11:15 – 11:25 – Moderator asks audience to work in small groups to answer the following questions with regard to planning issues:

1. How is the issue of information collection and exchange working at your port?
2. How does this issue affect your business? What could be improved?
3. How will you brief the leadership of your port about new policies regarding the exchange of information?

11:25 – 11:30 – Moderator asks small groups to take five minutes and propose one way that AAPA can help its port members address these new policies regarding information exchange.

11:30 – 11:35 – Report out – Moderator asks for volunteers to run through the answers to their questions and their proposal for how AAPA can help ports address this issue.

11:35 – 11:40 – Overview of the Issue of Management and Funding
(A speaker or the moderator will address.)

11:40 – 11:50 – Moderator asks audience to work in small groups to answer the following questions with regard to management and funding issues:

1. How do management and funding issues for your individual projects fit with these new watershed policies?
2. How are these new policies going to affect your business?
3. How will you brief the leadership of your port about these changes?

11:50 – 11:55 – Moderator asks small groups to take five minutes and propose one way that AAPA can help its port members address management and funding issues.

11:55 – 12:00 – Report out – Moderator asks for volunteers to run through the answers to their questions and their proposal for how AAPA can help ports address this issue.

Workshop 2 Assessing and Managing Air Emissions at Ports

Purpose of the Session: Learn about air quality management at ports and apply proven management techniques to air quality issues within your own port.

Format: The audience will hear from a series of four speakers who have applied various techniques to reduce air emissions and have expertise in the following areas standards, inventories, general conformity, and mitigation. After we hear from each speaker the audience will break up into four teams and will be asked to come up with their permitting strategy based on a scenario outlined by the facilitator. At the end of the session each team will be asked to report on its strategy and will be graded by the panel. A prize will be given for the best grade.

Facilitator Responsibility: To introduce each speaker and describe their presentation in one sentence or less. The facilitator will also walk the audience through a fictitious air emissions scenario that will be used as the basis for the team activity. Each speaker will be asked to participate in one of the four teams.

1:30 – 2:30 – Speaker Presentations:

1:30-1:35 (5 minutes) – The panel will be introduced by the moderator, who will ask that questions that from the audience be written on an index card and given to the moderator.

1:35-1:45 (10 minutes) – Topic 1: Ozone and Particulate Standards

Speaker 1 will discuss the implication of the New Air Quality Standards and how they affect ports.

1:45-1:55 (10 minutes) – Topic 2: Emissions Inventories

Speaker 2 will discuss techniques for performing emissions inventories at port facilities.

1:55-2:05 (10 minutes) – Topic 3: General Conformity

Speaker 3 will be discussing what the new ozone standards mean in terms of port expansion via general conformity.

2:05-2:15 (10 minutes) – Topic 4: Mitigation

Speaker 4 will be discussing mitigation, techniques in terms of dredging.

2:15-2:30 (15 minutes) – Questions and Answers

2:30-2:35 (5 minutes) – Scenario Introduction by Speaker

The moderator will ask the audience to write any questions on index cards.

The Scenario

The community around the Port Authority of Greenville has seen a vast increase in growth as the city's historic downtown is attracting greater numbers of tourists and seasonal residents. In addition a number of major retailers have located their regional distribution centers nearby, and depend on the port to bring in their goods. This increase in activity has also increased public scrutiny of the port.

The City of Greenville and its surrounding counties have just been determined as being in Non-Attainment of 8-hour Ozone, and have been proposed by their state, as being in Non-Attainment of PM 2.5. In accordance with the clean air act the State is drafting a State Implementation Plan, for 8-hour Ozone. The SIP will include a list of approved projects and emission allowances and policies related to measures to reduce emissions from future projects (i.e. those not included in the SIP) and from on going operations.

The port is approaching capacity and needs to expand. The port owns land adjacent to the historic downtown that it purchased years earlier for development. In order to be developed the port will need to deepen the channel to accommodate larger ships. The port and the state have also decided that on-dock rail and new highway access lanes will be key in diverting truck traffic from the historic streets. The on-dock rail will need go through the historic downtown area in order to link up with the city's rail yard. The tourism industry and local residents have expressed concerns over the rail line and air quality issues from the increase in truck traffic, rail activity, the port's dock equipment, and the numbers of vessels now able to enter the port.

Workgroup participants must:

- Devise a plan for being included in the SIP, and include mitigation measures. In addition, devise a plan to communicate why this project will be beneficial and not have any harmful effects on the community.
- Have a back-up plan in case the project is not accepted into the SIP, and
- Present its ideas to the audience.

Curveball: the port discovers that the rock under the new section is more solid than expected and therefore the emissions allowed in the SIP will be exceeded. The port must then devise a plan to lower those emissions that exceed the values in the SIP. Or the project is allowed in the SIP with reasonable agreement from the community

2:35-2:45 (10 minutes) The audience will formulate questions on index cards and give them to the moderator.

2:45-3:00 (15 minutes) Break

3:00-3:15 (15 minutes) The moderator will ask the audience's questions to the panel.

3:15-4:15 (10 minutes) Audience breaks into groups.

SAMPLES OF SOCRATIC DIALOGUE SCENARIOS (Model 6)

Socratic Dialogue Script

Facilitator

Characters:

Port Director

Director of Operations

Reporter

Public Relations Professional

Local Coast Guard

Local Customs

Community Activist

Scenario 1

The cast of characters will be intimately involved with Port America and this shocking crisis situation in the next 90 minutes. For our panel and the audience, here is the scenario.

Port America is a small niche port with chemical and liquid bulk facilities. It is located five miles off the ocean, and along the ship channel leading to the port are many manufacturing businesses and two natural gas refineries. Port America has worked hard to play an active role in the community and to provide its citizens with various recreational facilities for boating, picnics, shopping, and dining. The port encourages residents of the Town of America to visit the port and its many attractions.

This particular day starts out like many others – the sun is shining, people are out walking around the nearby shops and restaurants, and the port is busy planning to receive three ship calls. At 9:30 a.m. the port director at Port America learns from the local Captain of the Port that a vessel in the ship channel carrying highly explosive chemicals has been hijacked. The Coast Guard Sea Marshall who boarded the vessel was taken hostage and there has been no communication with the vessel since his boarding. No other details are available except that there are armed men on deck and neither the Coast Guard nor local law enforcement can get close to the vessel without encountering gunfire. The vessel is cruising towards the port and the Coast Guard is estimating that the vessel could reach it within 20 minutes.

The Facilitator asks questions of the participants about next steps.

Sample questions directed to:

1. *Port Director:* As the Port Director, what is your role in responding to this crisis? Are you in charge of setting up the command center?
2. *Director of Operations:* As the Director of Operations, have you been involved in developing the contingency plan for the port in the event of a terrorist incident? Will this be useful? Do you know where the plan is?
3. *Public Relations Professional:* Does the port have a communications plan for dealing with this type of disaster?
4. *Reporter:* How will you handle this story? Is it too dangerous for you to send other reporters or cameramen to the scene?
5. *Local Customs:* What is the U.S. Customs Service role in this situation?
6. *Local Coast Guard:* Now that you have warned the port about this impending disaster, what are the Coast Guard's next steps?
7. *Community Activist:* Do you feel confident that the port, local law enforcement and U.S. Coast Guard are in charge? How can the surrounding community help?

Scenario 2

Soon after the Coast Guard announces the hijacking, the Director of Public Affairs informs the Port Director that the Port America Maritime Museum is hosting an educational field trip of all the third and fourth grade students from the various area schools in honor of Maritime Appreciation Week. The Maritime Museum is located on the water right next to the shipping channel. The students are one of the first groups that must be evacuated because of their proximity to the approaching hijacked vessel.

Sample questions directed to:

1. *Port Director:* Who is in charge of an evacuation strategy?
2. *Director of Operations:* Will this have any impact on port operations and the port's evacuation?
3. *Community Activist:* I understand that you have been encouraging the port to take the lead in developing a disaster plan for the surrounding community (the shops, restaurants, museum, etc.). Was this completed, and if so will this be helpful in the evacuation efforts?

Scenario 3

A bridge a mile south of the port connects Route 220, a main secondary road that runs through the city of Port America. This road is also the main evacuation route out of the city and out of the port in the event of a catastrophic emergency. Even though the hijacked vessel could clear the bridge, the U.S. Coast Guard is unclear about the hijackers' intentions.

Sample questions directed to:

1. *Local Coast Guard:* How does this change the evacuation plan? Is it better to have people remain in the ports/surrounding area?
2. *Port Director or Public Relations Professional:* How do you reach out to the surrounding community to let them know how to prepare for the potential disaster?

Scenario 4

CNN national news has just announced that a local resident has reported seeing a 40-foot pleasure craft heading for the hijacked vessel. Early reports indicate that this vessel has also been hijacked but there is no evidence to substantiate this rumor.

Sample questions directed to:

1. *Port Director:* How does this affect the contingency plan? Who do you call to get accurate information?
2. *Local Coast Guard:* What is the Coast Guard's role in trying to seek out accurate information on this new pleasure vessel situation?

Scenario 5

Since September 11, the port, local Coast Guard and local law enforcement have been trying to purchase a new state-of-the-art radio communications system to be used in emergencies such as this. The system has been purchased and installed but has not been fully tested. Telephone and cell phone service is unreliable since the announcement of the hijacking because everyone in the surrounding area is trying to call loved ones and make evacuation plans.

Sample questions directed to:

1. *Local Coast Guard:* What is the back-up plan for communicating between the port and local law enforcement? Should you use the new radio system or do you have another back-up plan?
2. *Director of Operations:* How do the Director of Operations and other key port personnel communicate with the rest of the port and aid in the planning for this impending disaster?

SAMPLE HYPOTHETICAL (Model 8)

Sample Hypothetical

The Deepwater Port Authority is a local governmental entity created by State statute. The Port Authority consists of a governing Board of seven members. Three members are appointed by the State's Governor with the consent of the State Senate. The remaining four members are elected for four-year terms out of the single-member districts within the County in which the Port Authority's facilities are located. Deepwater's marine terminal facilities are leased to ocean carriers and marine terminal operators.

- Port Director Tommy Tonnage is hired by the Board and is currently in his third year of a five-year employment contract. Mr. Tonnage has management experience in a private corporation before his appointment as Deepwater's Port Director. Mr. Tonnage is an old friend and political supporter of the Governor, James Votegetter, and continues to communicate with the Governor on a regular basis.
- Governor Votegetter announced two years ago that he felt that Deepwater should be more responsive to the public needs, and to achieve that goal, appointed Sally Sayalot, Mayor of Manatee, the municipality in which a number of Deepwater's marine facilities are located, to the Board. Among the elected members of the Board are Mike Container, a representative of the local waterfront labor union and Charles Storage, the owner of a large warehousing operation which does business at Deepwater.
- Under the Charter of the Deepwater Port Authority, three executive port positions are filled by appointment of the Board – the Port Director, General Counsel and Chief Financial Officer. Deepwater's General Counsel, Frank Speaking, has served as attorney for the Port Authority for 15 years. The Chief Financial Officer, Nick Numbers, was appointed three years ago.
- Deepwater's Operations Division is directed by Bob Bulkhead, who was hired by Tommy Tonnage following an exhaustive executive search. Mr. Bulkhead was formerly the Port Director of a smaller neighboring seaport which competes with Deepwater.

Frank Speaking received a telephone call from Mayor Sayalot, who asked about the status of negotiations regarding the lease for one of Deepwater's marine terminal facilities to Best Service Steamship Line. She said that the Governor was interested in this deal going through because there was a feeling that it would generate more cargo and therefore more jobs. Mayor Sayalot also mentioned that she would be talking to Tommy Tonnage about economic incentives to ensure that Best Service closed this deal. She asked Frank Speaking to call her daily to keep her informed and urged him to pay close attention to this matter given the Governor's keen interests in this transaction.

Frank Speaking phoned Tonnage and Bulkhead and informed them both of the conversation he had with the Mayor. While he was on the phone with Bulkhead, Bulkhead told Speaking that he disagreed with the strategy being employed in the negotiations and wanted it changed. Bulkhead informed Speaking, that Nick Numbers had, at Bulkhead's request, and with great reservation, revised the proposed rental rate schedule upward and wanted Speaking to insert the new rental terms into the draft lease with Best Service.

Later in the day, Tonnage met with his senior staff to discuss ongoing port projects. He expressed a concern that the negotiations with Best Service were dragging and asked his staff to prepare an outstanding issue list. At this meeting, Alex Sliderule, Deepwater's Port Engineer, described the circumstances surrounding the sealed bids which he had just received for the paving and construction of the marine terminal facility proposed to be leased to Best Service.

- One bid was submitted by a party which is not currently licensed as a general contractor but states in the bid that it is in the process of obtaining the needed license from the state.

- Another bidder provided a substitute for the concrete specified in the design documents. This bid also contained a miscalculation of numbers, providing the wrong total bid amount.
- A third bidder failed to disclose the names of its corporate officers and forgot to include its zip code and mailing address.
- The remaining bid was submitted by a contractor that recently completed a Deepwater project wherein such contractor constantly requested change orders, was late in completing the project, and had a poor reputation for paying its subcontractors.

Mr. Bulkhead explained that there were some problems with the proposed Best Service lease. Bulkhead stated that it was his understanding a stevedoring company was also seeking to lease the same facility, but Mayor Sayalot would prefer that the facility be leased to Best Service. Bulkhead stated that he believed the terms of the proposed lease in its current draft version were very favorable to Best Service. There were also environmental problems with the proposed leasehold site and a decision had to be made whether to seek the cost of cleanup from the prior tenant, submit a claim under certain insurance policies, have Deepwater absorb the cost of cleanup, or attempt to avoid a cleanup entirely.

After a long discussion of various legal issues presented by Speaking, Deepwater's insurance manager announced that he opposed filing an insurance claim because of the possible impacts on the current insurance policy premiums. Mr. Bulkhead opposed seeking the costs from the prior tenant because of possible public embarrassment for not having adequately monitored its activities, and also the need to maintain "good relations." Mr. Bulkhead stated that he felt that this was, in fact, a business decision, not a legal one, and suggested that Frank Speaking not discuss it with any Board members. Tom Tonnage agreed and said that he would give the Board advice on the subject. Mr. Speaking cautioned that notice of a claim should be sent to Deepwater's insurance carrier but was told not to worry about it by Bulkhead.

After this staff meeting, Mr. Speaking received a telephone call from Commissioner Mike Container who stated that he had learned through his sources of the pending lease negotiations with Best Service Steamship Line. He said the carrier was non-union and would prefer that a union stevedoring company lease the facility. The Commissioner had a number of legal questions for Mr. Speaking regarding the lease, such as whether it was legal to enter into a lease which may provide Best Service a competitive advantage over the existing competition and asked if there were any other issues relating to the property.

Later in the day, Frank Speaking was summoned to the Port Director's office where he found Tonnage and Bulkhead waiting. Tom Tonnage advised Speaking, that Bulkhead learned Speaking had a telephone conversation with Commissioner Container and demanded to know the content of same.

Frank Speaking told them that he might have to discuss this and other matters with the Board. Tom Tonnage advised that he did not want to have any of the Best Service lease issues raised with the Board unless he did so directly.

Frank Speaking left Tonnage's office and proceeded to meet with Nick Numbers. Nick suggested that he and Speaking meet with the Board members individually to discuss the issues surrounding the proposed Best Service lease.

AAPA MODERATOR/FACILITATOR GUIDELINES

- The moderator/facilitator should work with the committee to identify potential speakers for your panel.
- Contact potential speakers, discuss seminar designs, presentation topic, and any special instructions, and invite speakers to participate.
- Membership Services will send speakers a copy of the "Speaker Guidelines." These are also available on the AAPA web site.
- AAPA can provide a formal letter of invitation to the speaker if needed.
- Once a speaker's participation is confirmed, please provide contact information to AAPA (name, title, address, phone, fax, and e-mail). AAPA will send out a confirmation letter and obtain the speaker's bio and audiovisual requirements.
- Six to eight weeks out, hold a conference call with speakers to go over session design and coordinate to avoid repetitive or conflicting presentations. Make sure each speaker knows the format of the session and exactly how much time they have for their presentation. See Planning Guide for more information.
- Remind panelists to provide a copy of their presentation to AAPA at least one week before the conference, preferably by e-mail. Attendees like to receive a copy of presentations at the program.
- Arrange to meet with your speakers at least 15 minutes before the session begins to coordinate final details, preferably in the session room, so that we may set up each speaker's audio visual requirements.
- To begin your session, introduce yourself and briefly discuss the session topic. Introduce each speaker (AAPA will provide biographies) before his/her remarks, saving questions until after all speakers have made their presentations OR follow the instructions outlined by the Committee for this session.
- You are the timekeeper. Please make sure that each speaker keeps to the agreed-upon time limit.
- Moderators/Facilitators are invited and encouraged to attend the business sessions and luncheon the day of their presentation, as well as any social activities the night before and day of their presentation. If attending the full program, Moderators/Facilitators are asked to register and pay the registration fee. All expenses (travel, lodging, etc.) are borne by the individual, who is responsible for making his/her own hotel reservations.
- **If you have any questions, please call Jodi Gibson at (703) 706-4717.**

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IN THIS EDUCATION AND TRAINING PROGRAM!**

AAPA SPEAKER GUIDELINES

- Speakers are asked to consult with the panel's moderator/facilitator concerning the session designs, the presentation topic, and amount of time allotted for the presentation.
- Speakers are requested to provide AAPA with a copy of their biography (approximately two paragraphs) and audio-visual requirements at least two weeks before the program.
- When several speakers on a panel are doing a PowerPoint presentation, we would like to try to eliminate the need for several computers at once, therefore **AAPA will provide a laptop for speakers**. To make sure that there are no problems with your presentation onsite, it is best to e-mail your presentation to the AAPA office at least one week before the program. If you are unable to send your presentation in advance, please **save your presentation on a CD Rom in PowerPoint format**. If you have any problems, please contact Jodi Gibson at the number below.
- Speakers should provide AAPA with a copy of their presentation at least one week before the program, preferably by e-mail to allow time for copies to be made. Alternatively, speakers are requested to bring an adequate number of copies for distribution at the program. Copies of speaker presentations will be posted on the AAPA web site.
- Speakers are expected to avoid making presentations that are clearly structured as a marketing strategy to promote their product(s) or services.
- A/V presentations should be prepared with a clear or dark background and a minimum 18-20 point font size to ensure legibility/visibility from all points in the meeting room.
- Speakers are invited and encouraged to attend the business sessions and luncheon the day of their presentation, as well as any social activities the night before and day of their presentation. If attending the full program, speakers are requested to pay the registration fee (non-member speakers may register at the member rate).
- All other expenses (travel, lodging, etc.) are borne by the individual, who is responsible for making his/her own hotel reservations.
- Speakers should plan to arrive at the meeting room at least 15 minutes before the panel begins to coordinate final details and to set up audiovisual requirements.
- **If you have any questions, please call Jodi Gibson at (703) 706-4717.**

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COMMITTEE GROUP DISCUSSION TEMPLATE (# 1)

These sample questions will help identify the Seminar's focus and direction:

- What is happening in the industry that is new and exciting?
- What are some new industry solutions or best practices that are transforming the industry?
- What are some tools/studies/best practices we can share with our industry partners that can make their jobs easier or ports more efficient?
- What are other industries doing that could be used as a model in the port industry?
- What most excites you about your job? What would you like to know more about?
- What are the possibilities this seminar could create for others?
- What could you share that could be an inspiration to others at this seminar?
- What would make this seminar even more successful?

What are the goals of this seminar?

- Number of participants
- Involvement of international partners/members
- Learning objectives from the participants' perspective
- List of possible participants/partners that could become involved as speakers or attendees

Please return this form to AAPA Seminar Staff

SEMINAR SESSION DEVELOPMENT TEMPLATE (#2)

Develop seminar sessions by identifying the following:

- Session title and description

- Learning objectives for participants

Use these models as samples to develop a style for each session

1 Single Speaker

2 Traditional Panel *(one moderator, three speakers for about 20 minutes each, Q&A)*

3 Traditional Panel with Facilitated Q&A *(one moderator, two or three speakers for 7-10 minutes each, written questions from audience, moderator summary)*

4 Traditional Panel with Speakers and Audience Participation *(one moderator, two or three speakers for 7-10 minutes each, quick audience exercise after each speaker)*

5 Workshop *(designed by the committee or industry expert, featuring speakers and audience involvement; several formats available)*

6 Socratic Dialogue *(uses a hypothetical situation to stimulate responses)*

7 Table-Top Exercise *(participants use a hands-on real-time approach to a hypothetical situation)*

8 Facilitated Discussion of Hypothetical *(discussion leader and one or two panelists discuss hypothetical situation, with audience participation)*

Identify Speakers/Moderators/Facilitators

Identify Speakers, Moderators, and Facilitators for each session, and identify who will contact each of these, and a deadline date. All speakers and moderators should be contacted no later than eight weeks prior to each event. Written guidelines are available to send to each speaker or moderator.

Speaker/Moderator/ Facilitator	Committee member who will contact Speaker	Deadline for contacting Speaker
_____	_____	_____
_____	_____	_____
_____	_____	_____
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Please return this form to AAPA Seminar Staff

AFTER-ACTION REVIEW TEMPLATE

An After-Action Review is a simple exercise that allows AAPA committees and staff to track results both good and bad following the completion of a seminar or event. Lessons learned from these reviews help to develop an internal quality management system where improvements can be made in the future. To ensure that the system works, these reviews need to take place after every event, notes must be taken and changes must be made to existing planning guides. The AAPA staff meeting could become the perfect venue for conducting these reviews. As we move forward with SHARE, this review could become more sophisticated and possibly turn into a check list.

Prior to the seminar or event, the coordinators (AAPA staff and committee leadership) should spend 10 minutes identifying the goals of the program. These goals should cover 3-4 major areas such as:

- Logistics
- Effectiveness of the Sessions
- Member satisfaction
- Financial/Sponsorship

Within a week after the meeting/event these same coordinators should meet again to complete an After Action Review. This review is simple. The following questions should be answered in each category identified above:

- What worked?
- What could make it better?
- What will we do differently next time?
- What goals would you set for the next seminar/event?

AAPA STAFF CONTACTS

Questions or comments on this material should be directed to

ED O'CONNELL

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703/706-4709 or eoconnell@aapa-ports.org**

JODI GIBSON

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