

NAFTZ Speaker/Moderator Guidelines

I. General Program Selection Policy & Procedures

Speakers and Moderators will be recommended and approved by members of the Program Committee on the basis of their specific knowledge of topics to be addressed, prior Speaker evaluation and/or knowledge of the Speaker/Moderator qualifications. Unless a government official, only attending the session speaking on, or otherwise specified, all event registration fees will apply to all speakers/moderators.

As a general policy, each company shall have only one represented Speaker on the slate of Speakers/Moderators. There may be certain exceptions to this policy based on the position and/or role of a particular Speaker/Moderator within the NAFTAZ organization. To the extent possible, any replacement Speakers will be drawn first from a list of contingency Speakers identified by the Program Committee.

The topics to be addressed in any NAFTAZ program are selected by the Program Committee based on membership inquiries, comments on former seminars and conferences, on changes that are occurring within the FTZ program or any other participating U.S. Government Agency or global program with an impact on the FTZ membership.

In the event of a Speaker/Moderator cancellation, the Program Committee Chairman will consult with the appropriate parties as needed, Chairman and/or the Executive Committee of the NAFTAZ to find a replacement. The circumstances of any cancellation will be documented, recorded and taken into consideration by the Program Committee when planning future programs.

The Speaker/Moderator impacted by a cancelling party will be notified by the NAFTAZ staff or Program Chair as to the replacement Speaker/Moderator.

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A. Speaker Roles/Responsibilities

- It is the role and responsibility of the Speaker to present factually correct information based on current regulations unless otherwise clearly noted. Topics that by their nature require subjective interpretation should clearly state, within both the written and verbal presentations, the context in which the opinion or interpretation was formed or upon the experience which it is based.
- Speakers are responsible for submitting the final presentation to NAFTAZ staff by the presentation submission deadline. Copies of the presentation should be submitted by the Speakers to their session Moderators in advance of that deadline for review.
- Deadlines for presentations shall be communicated to all invited Speakers and Moderators, with periodic reminders leading up to that date. Failure to provide presentations by the assigned deadline will be documented and will be taken into consideration when determining the agenda for future seminars/conferences.
- Any written materials, including submitted PowerPoint presentations, become property of the NAFTAZ for distribution to Members/Attendees.

NAFTZ Speaker/Moderator Guidelines

- Speakers may include name, company, address and phone number in their presentation material. Speaker Letterhead and/or Logos are not permitted.
- Speakers and Moderators are prohibited from including endorsements and promotion of services, individuals and firms as part of NAFTZ sponsored educational events.
- Speakers on panels shall agree to sharing time equally with the other Speakers.

B. Moderator Roles/Responsibilities

- The Moderator's role is to review and coordinate presentations prior to the delivery, introduce the Speakers at the sessions, acknowledge questions from attendees and perform timekeeping responsibilities during the session as noted above. Moderators of sessions acknowledge and agree that they are not the Speakers of the given session. Questions asked during a presentation should be restated by the Moderator if appropriate and addressed by the Speaker
- Moderators are responsible for working with their Speakers to ensure that presentations are provided to the NAFTZ by the given deadline.
- Moderators shall review the presentations for the sessions he/she will be moderating. Any issues identified by the Moderator should be discussed with the Speaker and then the Program Committee Chair. The Program Chair will discuss special presentation issues with the NAFTZ Board and Staff as necessary.
- Moderators will coordinate with their panelists prior to and during the conference to facilitate a complementary and fluid presentation.
- Moderators will maintain track of the schedule to ensure that the panel begins and ends on time.
- Moderators should highlight key points or summarize bios in coordination with Speakers. In the interest of time, please do not read the entire bio.
- As the Moderator is responsible for maintaining the structure and timeliness of the seminar/conference session, the Moderator is also responsible for maintaining order within a session. In the event a member of the audience attempts to usurp the role of the Moderator/Speaker or is otherwise disruptive in a session, the Moderator will politely request that the individual remove themselves from the session. For additional moderating tips, visit <https://www.usertesting.com/blog/12-expert-tips-for-moderating-like-a-pro>
- By signing this agreement, you acknowledge you have read and agree to the above. Additionally, you give permission to NAFTZ to use on their website and share with attendees the presentation prepared and audio/video recording (if any) in conjunction with this event.

Name

Signature

Date

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MODERATORS:

A moderator's role is to review the presentations of the speakers to be sure that they are 'on topic' and they are not duplicative of material presented in other sessions. At the conference or seminar, a moderator is generally assigned to either a morning or afternoon of program sessions. As moderator they introduce the session speakers and facilitate the sessions.

DISQUALIFICATION:

Any speaker or moderator who receives several bad evaluations for their presentations shall not be considered for speaking or moderating roles. In addition, any speaker who repeatedly does not submit their presentation materials on a timely basis shall not be selected for a role as a speaker at the conferences and seminars.



NATIONAL ASSOCIATION OF FOREIGN-TRADE ZONES

POLICY/PROCEDURE TITLE: GUIDELINES FOR THE PROMOTION OF NAFTZ EVENTS BY SPEAKERS AND MODERATORS

CLASSIFICATION:	FINANCE & ADMINISTRATION		
SUB-CLASSIFICATION:	Conferences and Seminars		
APPROVAL DATE:	March 6, 2019	REVIEW DATE:	March 2019

PURPOSE: The NAFTZ, as part of its core member services, presents several conferences throughout the year including, but not limited to member webinars, a Fundamentals program, a Legislative summit as well as a Spring & Annual Conference as part of the Association's educational offerings to its membership. The purpose of educational opportunities is to present timely international trade topics of interest to the Association membership including, but not limited to, Grantees, Operators, Users and other members of the trade community. These topics are presented by highly qualified Speakers and Moderators who are knowledgeable subject matter individuals in their respective fields.

The NAFTZ as an organization appreciates the promotion of its events. The purpose of this policy is to establish guidelines for the way in which the NAFTZ's conferences and educational opportunities are promoted and marketed by the selected Speakers and Moderators to ensure that the NAFTZ's interests are the focal point of any business or social media channels including, but not limited to, email, text, Instagram, Linked In, Facebook, Twitter or other social media campaigns and to further ensure that the designated Speaker or Moderator does not misrepresent his/her role in the conference or misuse his/her access to advance registration lists for his/her own personal marketing or for marketing by his/her organization/company.

NAFTZ Speaker/Moderator Guidelines

POLICY:

SPEAKERS & MODERATORS

- Any individual asked to participate as a Speaker or Moderator at an NAFTZ event must adhere to the NAFTZ Speaker/Moderator Guidelines.
- Speakers and Moderators are permitted to promote their participation via social media channels subject to the limitations set forth in this policy and the NAFTZ Speaker/Moderator Guidelines.
- When promoting NAFTZ events, Speakers and Moderators must use the NAFTZ event template provided by either the NAFTZ Director of Events & Education or another member of the NAFTZ staff.
- Any deviation from the NAFTZ event template must be reviewed and

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approved by the NAFTZ Director of Events & Education or another member of the NAFTZ staff.

- An individual must specifically identify themselves as a Speaker and/or Moderator in any promotional/marketing materials.
- If an NAFTZ event template is not provided, Speakers and Moderators may only identify the following information in any promotional/marketing distribution/communication:
 - Name of Speaker and/or Moderator
 - Name of the NAFTZ Event
 - Location of the NAFTZ Event (i.e., city/state, venue)
 - Date of the NAFTZ Event
 - Name of the Speaker/Moderator Session
 - Link to the NAFTZ website or event page on the NAFTZ website
- Speakers and Moderators are not permitted to use NAFTZ Registration lists for the promotion of their organization/company's services except as otherwise outlined in the NAFTZ's Sponsor Guidelines if the Speaker or Moderator is also a Sponsor of the NAFTZ event.
- Failure to adhere to this policy may result in the Speaker and/or Moderator not being invited to participate in future NAFTZ programming.
- Use of the NAFTZ logo or the NAFTZ event logo in any promotional/marketing materials must be pre-approved by a member of the NAFTZ staff.