Rocky Mountain Utility Exchange

Utility Exchange Facilitator Roles and Responsibilities

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UtilityExchange.org is committed to presenting quality educational activities (in-person conferences, web-based discussions, etc.) that deliver valuable ideas and information to our attendees. UtilityExchange.org recognizes that facilitating a session at one of our events requires substantial effort on your part and we thank you in advance for your contribution. Facilitators are required to register for the event and pay the registration fee. Facilitator participation is considered a contribution to the industry and thus no honorarium is offered, and travel / per diem expenses are not reimbursed unless subject to a written agreement negotiated in advance.

The role of session Facilitators and Support is three-fold: Communicate with Presenters, Organize the Session, Manage Session. A Lead Facilitator and a Support Facilitator has been assigned to each session. You may distribute duties as necessary, but the Lead will be primary for communication about your session.

Communicate. You will receive a copy of the presenter confirmations with all email addresses as well as a list with names, emails, and phone numbers when available of the person who submitted the session. Submissions are required to include contact information for presenters; sometimes presenter contact information is "protected" by an administrative assistant, and you must reach out to the submitter to get presenter details.

- Maintain communication with presenters to ensure they are prepared and have an enjoyable experience.
- Contact the panelists, arrange a call, and communicate the details of the session to them.
- Ensuring presenters confirm acceptance by registering for the event by specified deadline.
- Ensure presenters understand the Utility Exchange Presenter Policy.

Format

The agenda format has been adjusted to encourage online interaction. Each session will follow this format:

- Presentations (45 minutes): up to three 15-minute live case study presentations related to a central topic. Remember, it is up to 15 minutes per presentation, not per presenter. Encourage them to limit to no more than 7 or 8 slides per presentation group, and all slides for each presentation must be in one deck. Attendees will be encouraged to type questions/issues in chat for further discussion.
- Breakout Groups: up to 30 minutes of breakout group discussion with randomly-assigned attendees facilitated by session presenters. Attendees will be encouraged to add their perspective and explore common challenges/opportunities related to the topic.
- Wrap-up Discussion: up to 15 minutes to reconvene the full group to allow session presenters to report-out on key takeaways from the breakout discussion and respond to insights shared in the typed chat throughout the session.

You may decide your session will not have slides, or only a few opening slides, and have a presenter panel discussion rather than presentations, but should still plan to fit within the 45-minute time slot for the presentation to allow plenty of time for the discussion.

Organize

- Ensure presenters are prepared to provide professional, educational presentations or moderated discussions.
- Coordinate the presenters for appropriate topic and flow based on the session description and pre-submitted questions. Be sure to verify the agenda description remains accurate and the session meets the relevance and topic described.

- Organize the order of presentations and provide agenda description updates as needed. If presenters will appear in a different order than in the agenda, let staff know in advance the order of appearance so the slides will be in the correct order for the broadcast.
- Identify and notify us of any special AV requirements. Video clips must be provided 2 weeks in advance, and the slide deck should have a place holder for the video clip.
- Encourage the use of the Exchange Wide-Screen PPT Slide Template. We understand that sometimes corporate legal structure will not allow this, so use your best judgement, or let us know if you need assistance. The template is available on the Presenter FAQ page and is also on the Conference Planning page
- REVIEW the presentations in advance for appropriate case-study content and to ensure there are no blatant commercials. Contact the Presenter and review any concerns you have regarding their presentation. See the Exchange Presenter Policy for additional guidance. Give yourself at least two weeks for review and feedback.
- Obtain short introductions/bios of your presenters and prepare an introduction of the session.
- Review the pre-submitted soft-ball questions to help start the breakout and audience discussion.
- Notify us immediately if there are any presenter changes. All presenters are required to register for the conference.
- Provide final copies of any PowerPoint presentations no less than one week in advance for upload to presentation computer (operations will NOT accept presentations from presenters without your approval. Staff will not accept last-minute "edits" that you have not reviewed and approved).

Manage

- Introduce your session and presenters
- Manage the time and stay on schedule.
- Moderate Question and Answer sessions and discussion following presentations.