

Utility Exchange Presenter Policy

V3.1 – June 22, 2021

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 presenting at one of our events requires substantial effort on your part and we thank you in advance for your contribution.

Event Participation. All Presenters and Facilitators must register for the event and pay the registration fee unless subject to a written agreement negotiated in advance. Presenter and Facilitator participation is considered a contribution to the industry and thus no honorarium is offered, and travel / per diem expenses are not reimbursed.

Distribution of Materials: UtilityExchange.org will distribute presentation materials through the UtilityExchange.org website, www.utilityexchange.org, and perhaps use them in other UtilityExchange.org educational activities. The Presenter **shall not** include confidential or trade secret materials in their presentation or have "Confidential" on their slides. Presenters understand that their image and all materials presented at any UtilityExchange.org event may be provided in electronic form to the attending audience, UtilityExchange.org members, and allies. Presentations will be converted to PDF files for dissemination.

Summary: These guidelines provide information to Presenters and Facilitators for UtilityExchange.org events, as well as Advisory Committee. UtilityExchange.org desires that those who present or facilitate:

- Have significant knowledge and expertise in the subject area.
- Offer innovative and compelling thought leadership consistent with the purpose and theme of each UtilityExchange.org event.
- Possess sufficient presentation skills to effectively communicate.
- Do not commercialize presentations to make them solely about their organization, products, and/or clients.
- Are conscious of time limitations for sessions and individual presentations.
- Follow UtilityExchange.org recommendations and guidelines for preparation of PowerPoint presentations. The Exchange PowerPoint template is available on the Presenter FAQ page at www.utilityexchange.org/faqs-for-presenters

Presenter Standards: Registrants attend UtilityExchange.org events for educational and networking opportunities to further their personal and companies' knowledge of energy industry related issues. Presenters and Facilitators should attempt to present information keeping in mind how it can be used to educate members of the audience.

- **Knowledge of subject.** Presenters and moderators shall have in-depth knowledge of the presented subject, going beyond their personal experience or the experience of their organization or firm.
- **Presentation skills.** Includes, at a minimum, good voice projection, coordination of oral and visual information, ability to interact positively with the audience, and ability to synthesize information

into understandable segments and present them in an orderly and logical manner. One should avoid reading material from the slide presentation. Slide material should only illustrate key points of the presentation.

- **No commercials.** No Presenter or Facilitator will directly sell or promote any commercial product, service, or publication during any presentation. Distributing a company's promotional literature is prohibited except by event sponsors in designated areas or at designated times. No more than two slides may be used in a presentation describing the organization's capabilities and business operations. Exceptions will be made for Sponsor Showcase Lightning Round panelists and similar activities where it is made clear to event planners and the audience that the Presenter paid or otherwise provided consideration to UtilityExchange.org in exchange for a presentation opportunity.
- **Presentation Submission.** Provide your Facilitators with the final copy of your presentation for final review, approval, and uploading to the presentation computer 48 hours prior to your session. Facilitators must provide the final presentation to UtilityExchange.org staff no less than one week in advance of the session. Presentations (including "last-minute updates") will not be accepted directly from presenters.
- **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. Limit your presentation to no more than 7 or 8 slides, and all slides for each presentation must be in one deck even if there are multiple co-presenters. 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 in cooperation with other presenters in your session and your Facilitator that your session will not have slides, or only a few opening slides, and have a presenter panel discussion rather than presentations, but you should still plan to fit within the 45-minute time slot for the presentation to allow plenty of time for the discussion.

- **Presentations.**
 - Slides are not required. Conversational panels, discussions, and roundtables are encouraged.
 - Noncommercial supplemental information in the form of reports, analyses, or other public documents are welcome and will be posted to the agenda.
 - Video and audio is permitted, but UtilityExchange operations must be notified no less than 2 weeks ahead of time of any special requirements. Video files must be provided with the presentation to ensure they are properly uploaded and can be played during the live broadcast.
 - If slides are used, all slides must be provided in Microsoft PowerPoint format.
 - Do not overload slides. If you must apologize that the slide can't be read, then don't use that slide.

- Your opening slide should contain:
 - Title of presentation as listed in the program
 - Name(s) of presenter(s)
 - Date of presentation
- Closing slide should contain:
 - Name(s) of presenter(s)
 - Email address(es) and/or phone number(s) of presenter(s)
- **Utility logos may be used on each slide, however, vendor logos must be limited to the opening and closing slides ONLY.**
- Keep font size to a **minimum of 24 point**. Beware of using elaborate fonts since they may not be available on computers used at the conference. We recommend universal Sans Serif fonts such as Arial or Helvetica which are clear and easy to read as well, and not likely to scramble on a new computer.
- Beware not to place too much information on one slide. We recommend keeping verbiage to **less than five lines or bullet points per slide**. Use the slides as a guideline, not to tell the whole story!
- Use charts appropriately and don't try to put too much data on the screen. If the audience can't read the slide, don't use that slide and try presenting it in another way.
- Limit your number of slides to approximately 7 or 8 per presentation (not per presenter). Coordinate the amount of time you have to present with your Facilitator, but we recommend no more than one slide per 2 minutes of actual presentation. The conversation will be continued during breakouts, and that's the time reserved for detailed question responses. Leave the audience with a reason to come speak with you again. Review format details above for online presentations.

Facilitator Coordination. It is strongly suggested that Presenters contact the session Facilitators on their specific panel in advance of preparing a presentation to discuss the content, focus and timeframe to ensure there is no overlap or redundant information. Also, the Presenter should pro-actively provide a bio to the Facilitator for use in their introduction as well as suggested "ice breaker" questions to stimulate interaction with the audience and/or panelists. Review your agenda description and submitted questions to be sure you stay on track with your presentation.

- **Schedule.** The final presentation shall be provided to the session Facilitators for advance review at least two (2) weeks prior to the event. Presenters who do not provide their presentation slides or notes or otherwise communicate their intentions to the Facilitators risk being removed from the agenda.
- **Presentation Submission.** Facilitators must provide the final presentation to UtilityExchange.org operations no less than 24-hours in advance of the session. Presentations will not be accepted directly from presenters on-site. Video is due 2 weeks in advance. Slide decks should contain a video placeholder slide.
- **Cancellations.** UtilityExchange.org strongly encourages Presenters and moderators to notify UtilityExchange.org immediately if an emergency should prevent him or her from presenting a session, and to the best of their ability, attempt to provide a substitute to fill the vacancy.

Facilitator Standards: The Facilitator's role is to ensure that the session runs smoothly and on schedule and Advisory Committee's intention. Presenters must work with their Facilitators to ensure their materials meet UtilityExchange.org standards.

- **Presenter Invitation and Session Description.** Once recruited and assigned by UtilityExchange.org Facilitators will assume primary responsibility for confirming Presenters' information and the session description for their portion of the agenda. This includes providing periodic updates to staff on status of Presenter commitments, and preparing a clear articulation of the session's learning objectives for inclusion in event promotional materials for prospective attendees.
- **Presenter Coordination.** Facilitators will reach out to invited Presenters as soon as commitment is confirmed to set a future date for a conference call or technical rehearsal to review content, focus and timeframe to ensure there is no redundant or inappropriate information and that all technical requirements are understood. Further, Facilitators will at this time solicit Presenter bios and pre-arrange for "ice breaker" questions to generate panel/audience interaction, as appropriate.
- **Presenter/Author Coordination. Facilitators** will reach out to confirmed Participants as soon as submission is accepted and confirmed to set a future date for a conference call or technical rehearsal to review content, focus and timeframe to ensure there is no redundant or inappropriate information and that all technical requirements are understood. Further, Facilitators will solicit or otherwise pre-arrange for "ice breaker" questions to generate panel/audience interaction, as appropriate. Facilitators are responsible for gathering appropriate biograph and photo from Participants to use in introductions or acknowledgements.
- **Presentations.** The Facilitators are responsible for the review of the presentation materials at least two weeks before the scheduled event to ensure that they are in compliance with the above standards. The Facilitator will work with the Presenter to resolve any discrepancies.
- **Audio/Visual Equipment.** The Facilitators are responsible for fully understanding the audio visual equipment used for the Exchange. Each presenter should be prepared to be camera-ready for the live online presentation. A headset or headphones are required for best audio and to avoid feedback. Dialing in by telephone is recommended, especially if you have a challenged internet connection. Contact staff if you need advice or need to test your setup.
- **Presenter Introduction/Bio.** The Facilitators are responsible for introducing each Presenter. They are to provide background information and frame the introduction to the presentation and session as a whole. The introductions shall be rehearsed.
- **Panel/Session Management.** The Facilitators are responsible for the time control of each presentation and the coordination of the session as a whole. The Facilitators will manage and coordinate questions from the floor and answers from the panel to ensure that the discussion benefits the audience as a whole. The Facilitator will initiate the session with a slide presentation outlining the session topic and Presenters.
- **UtilityExchange.org Representative.** Facilitators will recognize their responsibility to be professional and non-partisan. They represent the entire event, and will keep in mind first and foremost that the event must be managed for the benefit of the majority of participants, and will not be a tool to further a personal agenda or interest. They will encourage the same behavior for the Presenters in their sessions.