RMUE Presenter Policy
April 9, 2018, v2.0

UtilityExchange.org is committed to presenting quality educational (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.

Compensation: Presenter and Co-Chair participation is considered a contribution to the industry and thus no honorarium is offered and travel / per diem expenses are not reimbursed.

Event Participation. All Presenters and Co-Chairs must register for the event unless subject to a written agreement negotiated in advance.

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 co-chairs for UtilityExchange.org events, as well as Advisory Committee. UtilityExchange.org desires that those who present or co-chair:
- 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 engage in marketing or commercialize presentations 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.

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/moderators/emcees 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 Co-Chair will sell or promote any commercial product, service, or publication during any presentation. Distributing or handing out a company's promotional literature is prohibited except by event sponsors and exhibitors 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 co-chairs with the final copy of your presentation for final review, approval, and uploading to the presentation computer 48 hours prior to your session. Co-chairs must provide the final presentation to UtilityExchange.org operations no less than 24-hours in advance of the session. Presentations (including "last-minute updates") will not be accepted directly from presenters on-site.

- **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.
  - If slides are used, all slides must be provided in Microsoft PowerPoint format.
    - Prezi, pdf, or other may be allowed with special arrangement no less than two weeks in advance of the conference.
    - 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 it can be played, in the event internet service is not available at the time of presentation.
  - Presenters should use the RMUE template when possible, or at least for their opening and closing slides if they are not permitted to use it throughout. The slide templates (wide screen is preferred) can be found at www.utilityexchange.org/faqs-presenters

  - 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.

- Limit your number of slides to approximately 10. Coordinate the amount of time you have to present with your co-chair, but we recommend no more than one slide per minute of actual presentation, and leave one-third of your time for Q&A. Remember, you can always continue the conversation during networking. Leave the audience with a reason to come speak with you again. Ensure presentation length is appropriate with 2/3 of time in presentation and 1/3 of the time reserved for Q&A (e.g., a 30-minute session with 2 presenters would allow each presenter 10 minutes to present, and reserve 10 minutes for Q&A).

Co-Chair Coordination. It is strongly suggested that Presenters contact the session Co-Chairs 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 Co-Chair for use in their introduction as well as suggested "ice breaker" questions to stimulate interaction with the audience and/or panelists.

- **Schedule.** The final presentation shall be provided to the session Co-Chairs 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 co-chairs risk being removed from the agenda.

- **Presentation Submission**. Co-chairs 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.

- **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.

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

- **Presenter Invitation and Session Description.** Once recruited and assigned by UtilityExchange.org Leadership, Co-Chairs will assume primary responsibility for confirming Presenters' information and the session description for their portion of the agenda. This includes providing periodic updates to Leadership and Operations Director 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.** Co-Chairs 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, Co-Chairs will at

this time solicit Presenter bios and pre-arrange for "ice breaker" questions to generate panel/audience interaction, as appropriate.

- **Presenter/Author Coordination.** Co-Chairs 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, Co-Chairs will solicit or otherwise pre-arrange for "ice breaker" questions to generate panel/audience interaction, as appropriate. Co-Chairs are responsible for gathering appropriate biograph and photo from Participants to use in introductions or acknowledgements.

- **Presentations.** The Co-Chairs 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 Co-Chair will work with the Presenter to resolve any discrepancies.

- **Audio/Visual Equipment**. The Co-Chairs are responsible for fully understanding the audio visual equipment used at the conference and providing the Presenters with any information to make their presentation smooth and comfortable. A presentation computer, projector, and remote control for advancing slides will be provided for each session. Microphones will be provided for general session presentations. If any special seating or other AV needs exist (i.e., video recordings), they must be pre-arranged to ensure functionality. Co-chairs must inform PLMA operations of any special audio/visual requirements of presenters at least 2 weeks prior to presentation. Co-Chairs must ensure that video files are compatible and playable.

- **Presenter Introduction/Bio.** The Co-Chairs 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 Co-Chairs are responsible for the time control of each presentation and the coordination of the session as a whole. The Co-Chairs 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 Co-Chair will initiate the session with a slide presentation outlining the session topic and Presenters.

- **UtilityExchange.org Representative**.   The Co-Chairs are representatives of UtilityExchange.org. Co-Chairs 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.