Presenter and Co-Chair Policy
April 26, 2022, v4.0

Presenter Role and Responsibilities

UtilityExchange.org is committed to presenting quality educational (in-person conferences, web-based discussions, etc.) that deliver valuable ideas and information to our participants. 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 unless subject to a written agreement negotiated in advance.

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 and will be posted online.

Summary: These guidelines provide information to Presenters and Co-chairs for UtilityExchange.org events. 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 participate in UtilityExchange.org events for educational and networking opportunities to further their personal and companies' knowledge of energy industry related issues. Presenters and Co-Chairs should attempt to present information keeping in mind how it can be used to educate members of the audience.

- **Knowledge of subject.** Presenters 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 and 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**.
    - Staff will arrange at minimum two online meetings for each agenda session group. The first meeting will be introductions and coordination on the overall flow and information to be covered during the session to minimize overlap and avoid confusion. The second meeting will be a rehearsal to actually practice the presentation, providing the Co-Chair an opportunity to provide feedback and allowing time for editing and adjustments.
    - Presenters must provide Co-Chairs with the final copy of presentations for final review, approval, and uploading to the presentation computer 48 hours prior to the session. Co-chairs must provide the final presentation to staff 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 staff 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 event 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, 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 you need to apologize to the audience that they can't read a slide, don't use that slide.

- Limit your number of slides to approximately 10, unless directed otherwise. Snapshot presenters or sponsor showcase presenters will have fewer slides. 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. Presenters should maintain contact with the session Co-Chairs on their specific panel while preparing a presentation to discuss the content, focus and timeframe and to receive timely feedback. Presenter should pro-actively provide the Co-Chair some 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 staff 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 Co-Chairs notify UtilityExchange.org immediately if an emergency should prevent them 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, 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 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.

- **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 follow 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 audiovisual 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 audiovisual needs exist (i.e., video recordings), they must be pre-arranged to ensure functionality. Co-chairs must inform staff 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.** Staff will collect a brief bio from each Presenter. They are to provide background information and frame the introduction to the presentation and session as a whole.

- **Panel/Session Management.** The Co-Chairs are responsible for the time management of each presentation and the coordination of the session as a whole. The Co-Chairs will manage and coordinate questions from the audience and answers from the presenters 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.

Co-Chair Role and Responsibilities

In addition to the duties as described above, the role of session Co-Chairs is three-fold: Communicate with Presenters, Organize the Session, Manage Session On-site.

The primary-listed Co-Chair will assume the lead role in management the session with the secondary-listed Co-Chair provided support and guidance as needed. Should the primary Co-chair be unable to fulfil their duties, the secondary Co-Chair will assume the primary role. Staff will provide administrative support to both Co-Chairs as needed.

Communicate. Co-Chairs will receive a copy of the presenter confirmations with all email addresses as well as a list with names, emails, and phone numbers of the person who submitted the session.

- Maintain communication with presenters to ensure they are prepared and have an enjoyable experience.
- Coordinate with staff to schedule an introductory call to review the details and establish a flow and organization details of the session with them.
- Ensure presenters understand and comply with the Presenter Policy.

- Review and provide feedback on slides/presentation materials.
- Approve and ensure delivery of presentation to staff by prescribed deadlines.

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.
- 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). Organize the order of presentations and provide agenda description updates as needed to staff.
- Identify and notify staff of any special audiovisual requirements no less than 2 weeks prior to the event.
- Ensure presentations comply with the Presenter Policy formatting guidelines.
- Encourage the use of the RMUE 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 gaining compliance.
- REVIEW the presentations in advance (give yourself at least two-weeks for back-and-forth) 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.
- Prepare an introduction of the session, keep bio introductions to a minimum.
- Prepare soft-ball questions to help start the Q&A session and audience discussion.
- Notify staff immediately if there are any presenter changes.
- Provide final copies of any PowerPoint presentations no less than 24-hours in advance of the session for upload to presentation computer (staff will NOT accept presentations from presenters without your approval, and will not accept last-minute "edits" on-site that you have not reviewed and approved).

Manage Sessions on Day of Presentation

- Introduce your session and presenters
- Manage the time and stay on schedule (you will have the time cards).
- Moderate Question and Answer sessions and discussion following presentations.