

## Presenter Policy

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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. 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.

UtilityExchange.org will distribute presentation materials through the UtilityExchange.org website, [www.utilityexchange.org](http://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. Presenters understand that their image and the 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 Agenda Planning Committees. 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 Exhibitor Showcase 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.
- **Presentations.** Visuals should be professional in appearance, easily legible from the back of large rooms (i.e., limit the number of words on each slide to the salient points – may be no more than 40 words total, If you need to say "I know you can't read this", then don't use that slide). All presentations must be submitted in Microsoft PowerPoint format. It is recommended that no more than one slide per minute of presentation be used (i.e., a maximum of 15 slides for a 15 minute presentation). All presentations should include an audience interaction component.

**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 one (1) week prior to the event. Presenters who do not provide their presentation slides or notes or otherwise communicate their intentions to the moderator and/or emcee risk being removed from the agenda.
- **Cancellations.** UtilityExchange.org strongly encourages Presenters and moderators to notify UtilityExchange.org's Executive Director immediately in the event that 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 within the session schedule and planning committee's intention. They must work with the Presenters to ensure that 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.

- **Presentations.** The Co-Chair is 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.
- **Presentation Checkout.** The Co-Chair is responsible for checking the Presenter presentation materials on the Audio/Visual Equipment to ensure that it is fully functional and readable by the audience prior to the start of the session.
- **Audio/Visual Equipment.** The Co-Chair is 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, and coordinating with the Operations Director on any special needs or requirements. 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.
- **Presenter Introduction/Bio.** The Co-Chair is 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-Chair is responsible for the time control of each presentation and the coordination of the session as a whole. The Co-Chair 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-Chair is a representative 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.