Presenter Policy

May 5, 2022, v5

PLMA is committed to presenting quality education (in-person conferences, web-based Dialogues, training, whitepapers, speakers bureau, etc.) that delivers valuable ideas and information to our members and attendees. PLMA recognizes that presenting at one of our events requires substantial effort on your part and we thank you in advance for your contribution.

Compensation

Participation in any PLMA activity is considered a contribution to the industry and thus no honorarium is offered and travel/per diem expenses are not reimbursed.

Event Participation

Presenters, Moderators and Co-Chairs must register for the event, unless subject to a written agreement negotiated in advance. The conference registration fee may be reduced for Presenters, Moderators, and Co-Chairs pursuant to Officer approval for each event.

Distribution of Materials

PLMA will distribute presentation materials through the PLMA website, www.peakload.org, and may use them in other PLMA educational activities. Participants shall not include confidential or trade secret materials in their presentation. Participants understand that their images and the materials presented at a PLMA event may be provided in electronic form to the attending audience, PLMA members, and allies. Presentations will be converted to PDF files for dissemination.

Summary

These guidelines provide information to Participants for PLMA activities as well as PLMA Officers and members of PLMA Interest Groups that plan and produce PLMA activities, webinars, and papers. PLMA desires that those who participate:

- Have significant knowledge and expertise in the subject area.
- Offer innovative and compelling thought leadership consistent with PLMA's role as the Voice of Demand Response Practitioners.
- Possess sufficient presentation skills to effectively communicate.
- Do not engage in marketing/commercialization presentations of their organization and/or clients.
- Are conscious of time/length limitations for sessions and individual presentations.
- Follow PLMA recommendations and guidelines for preparation of PowerPoint presentations, whitepapers, webinars, etc.
- Agree to review and comply with the PLMA Code of Conduct Handbook, which includes Antitrust, Conflict of Interest, Confidentiality, and Whistleblower policies.

PRESENTATION ACTIVITIES

Speaker Standards

Registrants attend PLMA events for educational and networking opportunities to further their personal and companies' knowledge of Demand Response. Participants should attempt to present information keeping in mind how it can be used to educate members of the audience.

- **Knowledge of subject.** Speakers 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 Participant will sell or promote any commercial product, service, or publication during any presentation. Distributing or handing out a company's promotional literature is prohibited outside of the Sponsor Lounge, and there limited to Sponsors of the PLMA event. 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 panelists and similar activities where it is made clear to event planners and the audience that the presenter paid or otherwise provided consideration to PLMA in exchange for a presentation opportunity, and Sponsor Showcase panelists will be governed by this Presenter Policy, as well as specific Showcase limits and restrictions provided by the session Co-Chair. For further guidance, please refer to PLMA's Code of Conduct Handbook, Conflict of Interest Policy.

- **Presentation Submission.** Presenter will provide co-chairs with the final copy of the presentation for final review, approval, and uploading to the presentation computer 48 hours prior to the session. Co-chairs must provide the final presentation to PLMA 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.
- **Copyright and Permission Assurances.** By submitting presentation materials, constitutes the presenter assures PLMA that materials are approved for publication and posting on the conference resource page, and any necessary permissions for imagery or copyright release have been obtained.
- **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 may be provided for posting to the agenda.
    - If slides are used, all slides must be provided in Microsoft PowerPoint format, using the most current PLMA PowerPoint template, by the event deadline provided to you by PLMA. All other formats must be approved by special arrangement with PLMA Staff.
        - PLMA Staff requires two weeks notification in advance of your event presentation deadline if you plan to use a non-PowerPoint format for your presentation. However, due to the volume of presentations associated with some PLMA events, Staff cannot guarantee a change in slide formats will be accepted in all instances.
        - Any presentations with video and audio are permitted, but PLMA staff must be notified prior to the provided deadline. 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 PLMA slide templates when possible, or at minimum for their opening and closing slides if they are not permitted to use it throughout. The slide templates (wide screen is preferred) is provided with the confirmation letter.
- 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 fonts such as Arial or Times New Roman which are clear and easy to read as well.
- Beware not to place too much information on one slide. We recommend keeping verbiage to less than 6 lines per slide. Use the slides as a guideline, not to tell the whole story! 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 time to allow ample 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

PLMA requires that all presenters contact their session Co-Chairs (and moderators if applicable), in advance of their specific session to discuss the content, focus, and timeframe to ensure there are no overlaps in content or redundant information. Presenters must provide their professional headshot as well as their short two-paragraph bio to their session Co-Chairs or moderator for use in session promotion and introductions.

- **Schedule.** Your final presentation must be provided to the session Co-Chairs for advance review by the event deadline provided to you by PLMA. Presenters who do not provide their presentation slides or notes, or otherwise communicate their intentions to do so to the Co-Chairs, risk being removed from the agenda.
- **Presentation Submission.** Co-Chairs must provide their session's final presentation to PLMA Staff by the published deadline. Presentations, or updates to submitted presentations, will not be accepted directly from presenters on-site.
- **Cancellations.** PLMA strongly encourages Presenters, Moderators, and Co-Chairs to notify PLMA operations 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.

WRITING ACTIVITES

Author Standards

Readers of PLMA papers, blogs, and articles are seeking education to further their personal and companies' knowledge of Demand Response. Participants should attempt to present information keeping in mind how it can be used to educate members of the audience.

- **Knowledge of subject.** Authors shall have in-depth knowledge of the subject, going beyond their personal experience or the experience of their organization or firm, and shall present all information with proper sources or citations, avoid presenting opinions, provide case-study based facts and results, and provide the practitioner audience with the ability to apply the material in a decision making or planning capacity.
- **Writing skills.** Includes, at a minimum, appropriate grammar, structure, and organization of materials, and present them in an orderly and logical manner. One should avoid plagiarism, copying from advertising materials, or providing statements or drawing conclusions without a supported factual basis.
- **Style Guide.** Authors should comply with the PLMA style guide unless special arrangements are requested, to ensure consistency and facilitate final graphic design of all written materials.

CO-CHAIR STANDARDS

The Co-Chair's role is to ensure that the activity runs smoothly and on schedule with the planning committee's intention. Presenters and authors must work with the Co-Chairs to ensure that their materials meet PLMA standards.

- **Presenter/Author Invitation and Session Description.** Once recruited and assigned by PLMA Leadership, Co-Chairs will assume primary responsibility for Participant communications and the session description for their portion of the agenda or topic of their paper. This includes providing periodic updates to Leadership and Member Services Director on status of participant commitments, and preparing a clear articulation of the session's learning objectives for the other presenters as well as inclusion in event promotional materials for prospective attendees.
- **PLMA Policies.** The Co-Chairs shall provide each presenter with a copy of the "Presenter Policy" and PLMA Code of Conduct Handbook, which includes "Antitrust, Conflict of Interest, Confidentiality, and Whistleblower" policies. They shall obtain confirmation from each presenter that they understand and will comply with the policies. All current PLMA policies are posted at www.peakload.org/page/policies, behind the secure member password. All presenters are provided a copy of the presenter policy and Code of Conduct Handbook when notified of their successful submission.
- **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.** Session Co-Chairs are responsible for reviewing presentation materials by the deadline provided by PLMA in order to ensure all presenters are in compliance with the above requirements. Co-Chairs can work with a presenter to resolve any discrepancies, should one occur.
- **Audio/Visual Equipment.** The Co-Chairs are responsible for fully understanding the audio/visual equipment used at the conference and providing the speakers with any information to make their presentation smooth and comfortable. 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, playable.

- **Speaker Introduction/Bio.** The Co-Chairs are responsible for introducing each Presenter or preparing acknowledgments for authors. They are to provide background information and frame the introduction to the presentation/paper and activity as a whole. Presenter 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. 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-Chairs will initiate the session with a slide presentation outlining the session topic and speakers.
- **PLMA Representative.** Co-Chairs are representatives of a PLMA member organization for the purposes of presenting a conference. By accepting their roles, they agree to perform these duties in a professional and non-partisan manner.

Document Revision History

Date	Version	Person	Change/ Modification Description
1 Mar 2013	1.0	J. Childs	Initial version of policy accepted and enacted by PLMA Executive Committee.
1 Dec 2014	1.1	E. Thomas	Revised policy to include more specific emcee and moderator roles. Include language to require communication of PLMA policies. Draft sent to officers and executive committee for review
17 Dec 2014	1.2	J. Childs	Comments reviewed and consolidated. Version 1.2 sent to Conference Planning Committee and Executive Committee for review and edit.
12 Jan 2014	2.0	J. Childs	Policy adopted.
26 Jan 2017	4.0	T. Adolf	Revised policy to clarify terminology used in practice and provide additional guidance on use of slides and slide formats.
10 Mar 2017	4.0	J. Childs	Executive Committee approves policy. Policy Adopted and posted on PLMA website.
17 Oct 2017	4.1	J. Childs, PLMA Secretary	Modifications to AV sections, assurances of right to publish, separates Addendum policies into stand alone Code of Conduct handbook, and adjusts references to policy accordingly.
05 May 2022	5.0	M. Hammond	Modifications to speaker standards regarding presentation deadlines, session co-chair coordination and co-chair standards have been revised.

Notes: Items with black font have been completed. Items with shaded font are planned.