



# **Resources to Assist in Planning WEFMAX 2026**

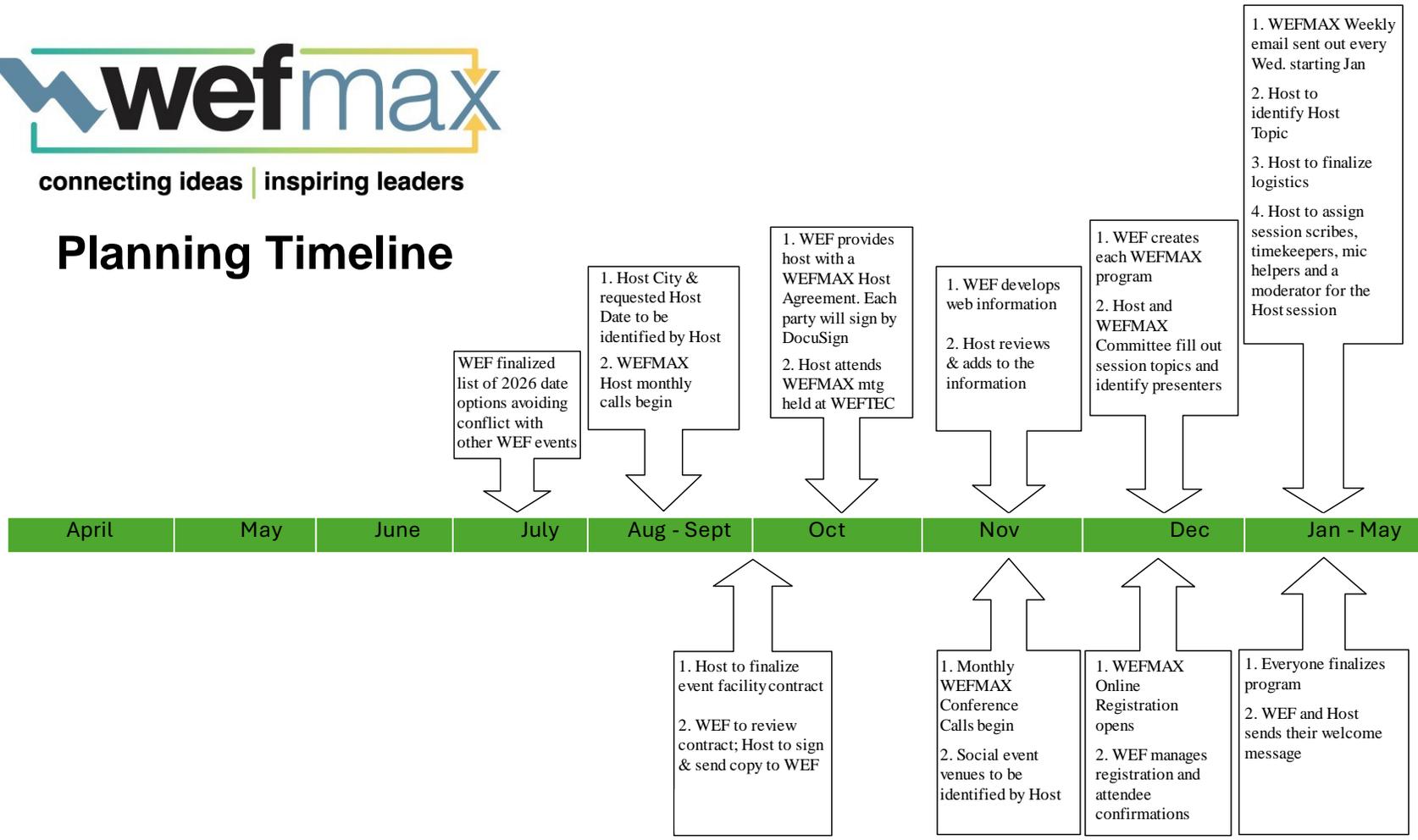
# WEFMAX Resources

1. Host Timeline
2. Steps to Planning a WEFMAX
3. Host WEFMAX Responsibilities
4. Event Check List for Wed-Friday Meeting
5. Tips and Pits
6. WEFMAX Q&A
7. Example Welcome Message from MA Hosts
8. Sample WEFMAX Agenda
9. WEFMAX Sponsorship Examples
10. PowerPoint Tips
11. Guideline for WEFMAX Moderator
12. Guideline for WEFMAX Scribe
13. Guideline for WEFMAX Mic Helper
14. Guideline for WEFMAX Timekeeper
15. Guideline for WEFMAX Guest
16. WEFMAX 2026 Committee and MA Host Contacts



connecting ideas | inspiring leaders

# Planning Timeline



Category 1: Public Information

## Steps to Planning a WEFMAX Meeting: Budget

(Wednesday-Friday WEFMAX meetings)

This document provides a guideline for Host Member Associations (MAs) in planning a WEFMAX meeting. A WEFMAX meeting is to be a stand-alone meeting and should not occur simultaneously with the MA's annual meeting.

### **BUDGET**

Each MA Host will receive a **\$25,000.00** stipend from WEF to cover meeting and social function expenses based on 60 attendees per meeting. When planning a WEFMAX meeting, try to factor in all covered event costs to stay within the **\$25,000.00** budget. If the Host MA exceeds the budget based on 60 attendees, then the MA will be responsible for payment of expenses over the budget. Should anticipated attendance exceed 60 attendees, then WEF will pay for the food cost of **\$225** per person for the number of attendees over 60 (including guests and WEF Staff). Host to submit receipts and reimbursable expenses no later than 6 weeks upon completion of event to [AP@wef.org](mailto:AP@wef.org) for reimbursement. WEF will provide reimbursement generally within one week.

### **Sample Budget Based on 60 Attendees:**

Meeting Room Rental, Printing Costs	1,500.00
A/V Equipment	3,500.00
Wednesday Social	
Thursday Social	
Meeting: 2 Breakfast, 1 Lunch & Breaks	<u>20,000.00</u>
<b>TOTAL</b>	<b>\$ 25,000.00 (USD)</b>

### **Budget Includes the Following Items:**

- Hotel Catering – Include all taxes (hotel, federal, state, provincial, local) and gratuity
- Thursday WEFMAX – Continental breakfast and refresh beverages
- Thursday Lunch – for all attendees
- Thursday evening group reception – preferred no sit-down dinner, make it fun with networking time
- Friday morning breakfast
- Local printing and supplies to be procured by MA Host
- Meeting Rooms for Canadian Affairs Council (CAC) meeting (if applicable) on Wednesday; and for WEFMAX sessions on Wednesday afternoon, all day Thursday, and Friday until afternoon
  - The WEFMAX meeting requires AV equipment i.e., 2 portable microphones, one lavalier, laser pointer/slide advancer, internet, screen, speakers + taxes + gratuity
  - Other presentation aids such as flip charts and tripods may be available from the venue
  - Host MA to provide LCD if able for WEFMAX or order through the venue

### **Budget Does Not Include the following:**

- Entertainment
- Alcohol – WEF does not pay for alcohol
- Social Event transportation such as a bus, taxi, or shuttle
- Social Event facility rental charges
- Gifts
- Spouse/guest food and beverage

### **Additional WEFMAX expense items that will be covered by WEF**

- **Attendance over 60** – Food/Beverage expenses incurred due to increased attendance.
- **Canadian Meeting** – The Canadian MAs hold their annual meeting in conjunction with a WEFMAX. They select which WEFMAX. They are to arrange for a meeting room through the MA host to be held prior to the start of WEFMAX or immediately following WEFMAX. WEF will cover room rental only if applicable. Room cost for this meeting not to exceed **\$400**. Any AV and food needs (breakfast, lunch, beverage, and snack) will be coordinated and paid by the Canadian MAs. Host hotel to work directly with the Canadian group for invoicing and payment.

## Steps to Planning a WEFMAX Meeting: Venue

### **SELECTING a CITY** - Help minimize expenses for attendee by choosing a city that:

- Has an airport with major airline service ideally within 30 minutes of the meeting location
- There is availability to an airport shuttle or reasonable transportation service versus the need to rent a car

### **SELECTING a HOTEL** - In looking for a hotel, consider selecting one that:

- Is close to the airport (ideally no more than 30 minutes from airport)
- Is a "Smoke Free" facility
- Hotel room rates should be below USD \$250.00 per night to include all taxes. Attendees must secure their own funding for travel and lodging
- Has in-house catering service; Ideally has in-house AV equipment and support
- Meeting room – consider room design (preferably no rooms with pillars, select meeting room that is not long and narrow)
- Available parking
- Negotiate with Hotel to honor room rate two days prior and two days after scheduled meeting
- **Have WEF review the hotel contract prior to the MA signing**

### **HOTEL ROOM BLOCK** –

- Wednesday – 60 | Thursday – 60 (also account for any organizers that are attending)
- Negotiate with the hotel to honor room block rate 2 days prior to and 2 days after event
- Avoid attrition fees. Keep in mind that not meeting a room block can result in hefty fees

### **MEETING ROOM SPACE** – Negotiate "at no cost" for meeting room(s) based on having met the room block

- Small meeting space for MA Staff to gather Wednesday afternoon (can be the same as room reserved for later Wednesday afternoon or a space in a common area).
  - Table for 8
  - Reserve meeting room on Wednesday from 2:00 – 5:30 pm
- **WEFMAX Meeting** – Set room for 60 – suggestions for room setup:
  - Tables -12 half rounds of 5 or 6
  - Podium at front of room; Beverage at opposite end
  - 2 skirted 8 ft tables in back of room for MA/WEF materials.
  - Reserve meeting room on Thursday from 7:00 am – 5:00 pm; Friday 7:00 am– 12:00 pm
  - MA Host to provide projector/large display if able; WEF to provide laptop; Need sound and internet.
  - Consider accessibility requirements if necessary and any special needs of attendees.

### **FOOD and BEVERAGE REQUIREMENTS** – Provide menus to WEF; be aware of dietary restrictions.

All luncheon socials ideally should be located in a nearby room from the meeting or directly outside of the meeting room.

#### **Wednesday Evening Social**

- Host to be creative with making the evening icebreaker social fun.
- Choose a location within the Hotel or within walking distance of the Hotel
- Keep food light as many like to go out to dinner

#### **Lunch on Thursday –**

- Set in rounds of 6
- Offer a light afternoon snack

#### **Thursday Evening Social** - Estimate 60 attendees and some guests to attend

- Host to be creative with making the evening social fun. Offer a casual atmosphere and provide a diverse menu of heavy appetizers. Sit down dinners can be conducted, however, cost should be a heavy consideration. Cash bar to be offered.
- Choose a location within the Hotel or within walking distance of the Hotel (keep in mind that WEF does not pay for transportation).
- WEF does not pay for restaurant room rental.
- Alcohol on a per person cash basis. WEF does not pay for alcohol; WEF will pay for the bartender(s).
- Plan social from 6:00 – 9:00 pm

#### **Breakfast on Thursday and Friday** – Keep it simple. Select a "Continental" menu if possible.

- Set buffet style inside meeting room or immediately outside of the room.
- Refresh Hot beverage (Coffee, Tea) service in the morning and afternoon break; offer juices, sodas to

include diet soda.

- Municipal Tap Ice Water filled jugs and glasses in the room are preferred to Bottled Water.
- Healthy Snacks in addition to “Cookies” are often appreciated by attendees.

Current as of August 2025

## **Steps to Planning a WEFMAX Meeting:**

### **Host Responsibilities for Programming and during the event**

1. The Host is responsible for coordinating logistics with venue, catering, and AV contractors. Keep in mind deadlines for providing final headcount to these contractors.
2. The Host to identify who from Host leadership will open WEFMAX with a welcome speech, emergency info/housekeeping details/schedule of events.
3. Host to acknowledge WEF Staff and MA Host Coordinator and or MA Staff as a resource throughout the event.
4. Host to acknowledge WEF dignitaries.
5. Host to introduce each Session and the moderator.
6. Host and WEFMAX Committee to assign roles needed during the event
  - a. One person to be the timekeeper per each session.
  - b. One person to scribe for each session.
  - c. 1-2 mic helpers for each session (# of mic helpers based on # of WEFMAX attendees).
  - d. Moderators for each session.
7. Host to identify the topic and presenter for the Host Session.
8. Host responsible for organizing the Wednesday social, Thursday Fun Walk/Run, and the Thursday Social.
9. Host responsible for adding in any tour, scavenger hunt, service event, or other fun and interesting events if there is time and interest.
10. Host and WEF responsible together to offer a Wednesday late afternoon event.
11. Host and WEFMAX Committee responsible together to build out the agenda topics/presenters
12. Host to work with WEF Staff to determine the supplies and printed material to procure locally.
13. Host to prepare a document listing restaurants and may include relevant attractions in the local area to share with the attendees.
14. Host to coordinate with WEF Staff to send out a welcome message. Approximately two weeks before event, host to provide WEF Staff with a welcome message containing site-specific information about the event and location socials, etc. Approximately one week before the WEFMAX event, WEF Staff will add a welcome message with general instructions to registered attendees via email, which will include information provided from the host.

### **WEF Responsibilities for Registration, Programming**

1. WEF Staff will advertise WEFMAX to the WEF House of Delegates and host the online registration service. The Host MA may advertise separately to their own MAs to increase awareness of the event
2. WEF Staff to track registration of WEFMAX attendees and guests
3. WEF Staff to provide the registration list, print badges, and bring lanyards
4. WEF will staff a registration check-in table at the Wednesday afternoon event and will also staff registration on Thursday morning held outside of the WEFMAX meeting room.
5. WEF staff to collect all presentations and have them ready at the time of presentation.
6. WEF to offer one WEFMAX for the Canadian Affairs Council to meet. WEF will work with the host to arrange a room and any food requirements.
7. Host and WEF responsible together to offer a Wednesday late afternoon event.
8. WEF to post all presentations on wef.org in the WEFMAX Library.
9. WEF to provide PowerPoint template for slides

## **Steps to Planning a WEFMAX Meeting: Host Responsibilities During WEFMAX**

### **Wednesday**

#### **MA Staff Meeting**

Provide a small meeting space (depending on the number of MA Staff registered for event, this could be in a common area, at a local restaurant, or in the meeting room to be used later in the day). This is an informal opportunity for MA Staff to gather, network, and share with each other. WEF Staff to communicate with registered MA Staff to develop agenda, if desired.

#### **Optional Tours or Other Sight-Seeing Activities:**

If an afternoon tour is planned, it could be held from 2:00-4:00 pm allowing all to get back in time for the group event.

#### **WEFMAX Kick Off Activity:**

Plan a gathering from 4:00 to no later than 5:30 pm. Host and the WEFMAX Committee together will plan and implement this session, time should be allotted for all to introduce themselves.

#### **Wednesday Icebreaker Social Event:**

Host is responsible for organizing an event providing light appetizers with a cash bar from 6:00 – 7:30 pm. Adding in a team building exercise has been popular and a great way to begin the networking journey.

### **Thursday – WEFMAX Day 1**

#### **(Optional) Fun Walk/Run Event:**

Host is encouraged to organize a group walk/run path to begin around 6:00 am and end by 7:00 am allowing time for all to get back in time for the WEFMAX start at 8:00 am.

#### **Host Welcome:**

Host will open WEFMAX with a welcome. Generally 10 minutes on the agenda. Give attendees a warm welcome and ask all our more seasoned attendees to be sure they get time to network with first-timers to enhance their WEFMAX experience.

#### **Introductions:**

Host will introduce each session's Moderator, announce breaks and reconvene times after breaks, Day 1 wrap up, and details on evening events. The host's role will be tailored to the actual WEFMAX agenda.

#### **(Optional) Community Service Activity:**

The Host may arrange a light service activity partnering with or benefitting a local community organization between or after sessions throughout Day 1. Example activities include community cleanup near the WEFMAX venue, encouraging WEFMAX attendees to bring books to donate to a local school, and soliciting in-kind donations to assemble care kits for a local shelter. Identify and coordinate with the intended service or donation recipient prior to committing the group to an activity.

**Thursday WEFMAX Social:**

The host is responsible for organizing a social event that will provide light fare, cash bar and networking. It can be held at the hotel or select an offsite restaurant which is walkable. Social to begin around 6:00 and end around 9:00 pm.

**Friday – WEFMAX Day 2****Introductions:**

Host will introduce each session's Moderator, announce breaks and reconvene times after breaks, and closing remarks. The host's role will be tailored to the actual WEFMAX agenda.



## Event Check List for a WEFMAX held Wednesday - Friday

### Wednesday Morning/Afternoon – Canadian Affairs Council (CAC) Meeting (11:00 am – 2:00 pm)

*\* only one WEFMAX will need to coordinate for a CAC Meeting. The current CAC secretary will work directly with the WEFMAX host coordinator on specific needs.*

- CAC Meeting held in room \_\_\_\_\_
- Provide lunch
- Room set for 15 with table set in a square or rectangle
- AV equipment may be required

### Wednesday Afternoon – MA Staff Meeting (2:00 – 4:00 pm)

- MA Staff meeting held in room \_\_\_\_\_
- Provide water; may require a light snack
- Room set for 8 in a casual setting
- No AV equipment required

### Wednesday Afternoon – Kick Off Activity (4:00 – 5:30 pm)

- Icebreaker meeting held in room \_\_\_\_\_
- Provide water
- Room set for 50
- Table set-up to match activity
- AV equipment may be required
- Host and WEFMAX Committee to plan the agenda

### Wednesday Evening – Icebreaker Social (6:00 – 7:30 pm)

- Icebreaker meeting held in room \_\_\_\_\_
- Provide light appetizers
- Provide cash bar with bartender
- Include a team building activity

### Thursday WEFMAX Day 1 (6:00 am for the walk/run | WEFMAX - 7:30 am – 4:30 pm)

- Fun Walk/Run at 6:00 am (optional)
- Light breakfast served at 7:30 am in room \_\_\_\_\_
- WEFMAX begins at 8:00 am held in room \_\_\_\_\_
- Room set in half rounds of 5 (based on 60 ppl)
- 8' X 8' screen
- Small table to set the projector on
- 3 – 6' draped tables to be placed in the back of the room
- Microphone – lavalier and 2 portable wireless microphones + podium with mic
- Projector – If the cost to rent is over budget, we would ask the MA to provide

- Laptop – WEF to bring
- Morning Break from 10:00 – 10:15 am
- Lunch from 12:00 – 1:00 pm held in room \_\_\_\_\_
- Afternoon break from 3:00 – 3:15 pm
  - o Healthy snack / Refresh beverages
- Wrap Up with Closing comments – Adjourned at 4:30 pm

**Thursday Evening - WEFMAX Social (6:00 – 9:00 pm)**

- Reception held at \_\_\_\_\_
- Event begins at \_\_\_\_\_ pm; ends at \_\_\_\_\_ pm
- Cash bar policy; hire a bartender
- Facility Name/location: \_\_\_\_\_
  - o In hotel \_\_\_\_\_ Within walking distance \_\_\_\_\_

**Friday – WEFMAX Day 2 (7:30 am – 12:00 Noon)**

- WEFMAX held in room \_\_\_\_\_
- Room and AV equipment set the same as the Thursday WEFMAX Day 1
- Continental Breakfast at 7:30 am
- Meeting begins at 8:00 am
- Morning Break from 9:30 – 10:00 am
  - o Refresh room and replenish beverages only
- Meeting ends at 12:00 pm

**Host Meeting Responsibilities**

- Host to select city and hotel location for WEFMAX
- Host to negotiate with hotel if the rental is over the allowed budget or cover the remainder
- Host to provide hotel contract to WEF for review
- Host to sign contract with hotel
- Host to identify location, coordinate, and contract for Wednesday Kick-Off Activity and Icebreaker Social, and Thursday evening social.
- Host to monitor expenses to stay within the WEF budget based on 60 attendees
- Host to bring projector for use at WEFMAX if the rental fee is over the allowed budget
- Confirm Host is receiving WEFMAX Weekly Update from WEF staff and can open registration reports
- Host to send welcome communication to WEF Staff
- Host MA to work with WEFMAX Committee to lead the Wednesday Kick-Off Activity
  - o Provide water
- Host MA to coordinate and manage the walk/run (optional)
- Host MA to identify Topic for Host Session (30-minute session)
- Host MA will identify scribes, Mic helpers & Timekeepers for all sessions
- Host MA Event Coordinator will:
  - o Schedule a Pre-Con walkthrough with Facility Staff, WEF Staff, and one person from the Host MA (*around noon on Wednesday*)

- Be present to greet attendees for the Wednesday afternoon social
- Provide opening attendee Welcome speech on Thursday morning (8:00 am)
- Provide closing remarks on Friday along with WEF Board of Trustee, and WEF HOD Speaker or Speaker-Elect.

### **Event Wrap Up**

- Host to pay for remaining expenses
- Submit receipts and final reimbursable expenses to [AP@wef.org](mailto:AP@wef.org) within 6 weeks of event
- Host to work with WEF Staff to ship any materials back to WEF
- Within 2 weeks after event, send WEF Staff any meeting notes and slide decks not already collected by WEF Staff. These materials will be posted online by WEF
- If a Virtual WEFMAX is to be hosted the same year, be ready to recommend 2-3 speakers from your WEFMAX to be considered for the virtual event

## Tips and Pitfalls

### **Room Selection/Setup**

- Avoid pillars in the meeting rooms that obstruct view across the meeting room—even if the hotel insists that they aren't a problem. (This has been an issue at past WEFMAX meetings)
- Avoid wood/tile floors for the acoustical issues
- Check to make sure there aren't loud activities going on in the next room, like a band or DJ playing, and have statements as such included in the hotel contract
- Avoid rooms with low ceilings; this affects the size of the screen and general visibility
- Visit the hotel/location to see meeting rooms first hand...brochures may use pictures from when the facility was newer, thus important to verify the current conditions of the facility, staff and service
- WEF recommends half rounds because this encourages dialogue, allows for good visibility by all attendees and gives you some flexibility in numbers (easy to add one or two more chairs at each half round). Other setups don't work as well. A classroom style setup leads to more of a lecture or presentation feel and doesn't encourage the open exchange and networking that makes WEFMAX so valuable. Full rounds limit attendees' visibility and your flexibility in numbers.

### **Meals/Breaks**

- Schedule lunch in a separate room – this allows for attendees to get up, stretch their legs and move around a bit. This is not normally an extra cost.
- Sometimes hotels will offer the breakfast as part of the room rate. This will help you save money on your budget.
- In a large room you should try to set up coffee breaks inside the room, otherwise people really feel like they are disengaging and leaving the meeting when they step outside. With a small room you may need to set up breaks just outside the room and this is ok.
- Consider skipping dessert at lunch and have a sweet snack break later in the afternoon.
- Include water station and soda (don't forget the diet drinks) in the morning, not just juice, coffee and tea.

### **AV Equipment**

- Important to find out if the hotel owns their AV equipment or if they use an outside contractor. There can be a significant cost increase if an outside contractor is required.
- Internet in the meeting room– Hotels can charge a lot to include internet service in the meeting room. We have found if you paid for a daily usage fee for internet service in your room...then most times you can use your password to connect most anywhere in the hotel. Ask the question when you meet with your hotel representative if you can use your room password in the meeting room. Another option is to have a wireless broadband internet card which is very reasonable in price.

### **Room Reservations/Meeting Numbers**

- When negotiating number of hotel rooms keep in mind that local attendees will likely not stay at the hotel. Also make sure to account for the WEF staff/leadership that will be staying in the room block (generally 5 people).
- You might wish to invite local attendees (teachers, local student chapter president, MA committee chairs, local politician) that might only stop in for a short while but you will still need the meeting space to accommodate them during the exchange.

### **Non-Hotel Locations**

A WEFMAX meeting doesn't necessarily need to be held at a hotel but in order for it to be a success make sure that an alternative site includes the following:

- Ability to host a meeting
- AV equipment and support
- Food for breakfast, lunch and mid-morning and mid-afternoon coffee/snack breaks
- Transportation to/from the location with local hotel
- Restrooms
- Comfortable chairs

It is extremely important to contact WEF staff ASAP with all details when considering a non-hotel location.

### **Sustainability reminders**

Whenever possible keep sustainable and green solutions in mind.

- Try to avoid bottled water. If this is necessary consider locally bottled water, and definitely stay away from types like Fiji water.
- Minimize the use of disposable items or use compostable plates and utensils
- Use recycled paper products
- Use and encourage attendees to use double sided copies for any meeting handouts

## **WEFMAX Q&A**

### **What to keep in mind when Selecting a Host City.**

In choosing a city – look for a city near an airport (no more than 30-minutes away from the hotel) to avoid the need for the attendees to rent a car.

### **Selecting a Hotel/Facility**

- Look to keep the Hotel cost below \$250 US per night
- Check to see if the hotel offers airport shuttle service. If not, what are the transportation options available (taxi, Uber, Lyft, other)
- If the hotel has steps at the front entrance, check to see if there is a ramp for attendees for those who cannot do steps
- The hotel must be a “smoke free” facility
- What are the parking facilities and fees; keep in mind locals may not be staying at the hotel will need to know parking options
- Check the local city activities to be sure the facility is not located in the path of a large festival, marathon run or another large local event.

### **What Type of Food should be Chosen for the Wednesday Icebreaker Social**

Host will look to provide fun, offer ongoing networking opportunities, adding in a fun team activity and make for an evening that is more of a reception, and not confining in conversation as a dinner setting would offer. Plan for light food, some tables (include some sit down and some small standing tables) and a cash bar with bartender.

### **What Type of Food should be Chosen for the Breakfast and Lunch Menu?**

Breakfast should be continental style offering an assortment from the following options: bagels, Danish/muffins, hard boiled eggs, yogurt, cereal, fresh fruit, coffee, and tea (regular and decaf), juice and sorted sodas/diet sodas. When possible, include protein items and not just carbohydrates. If we need to meet the minimum food order, then upgrade the breakfast to hot foods. At the morning break, ask the facility staff to refresh the room and replenish beverages only. Lunch should offer a diverse menu option to include non-meat items and dessert. Include iced tea/assorted sodas/water. If we have met the food minimum, then look to moving the lunch dessert to the afternoon break.

### **What Type of Food should be Chosen for the Thursday Social?**

The host will look to provide fun, offer ongoing networking opportunities, and plan for an evening that is conducive to people wanting to linger a while before possibly heading out to dinner elsewhere. Consider heavier appetizers and some tables (include some sit down and some small standing tables). If a sit down dinner is desired, cost should be considered within the overall budget. Plan for the individual to order/purchase their own drinks. Make sure all attendee dietary restrictions are observed and met.

### **What is the WEF Policy on Alcohol?**

WEF has a Cash Bar policy for social events at WEFMAX meetings. This decision was made in 2003 to reduce liability exposure for MAs and WEF. The facility must provide the bartender and

should not be served by WEF Staff, or a WEF volunteer. The MA Host is welcome to offer a cash bar or host may choose to sponsor the bar. The MA Host may provide a specific number of drink tickets and then attendees would pay cash for any additional drinks. The host may also prefer to offer an open bar for a set time and require that the attendee pay in cash/credit card/or charge to their room. We encourage attendees to drink responsibly, so be sure there are options for those that may need a ride back to the hotel.

### **What is the WEF Policy on Cruise/Boat venues?**

As the MA Host contracts out with the cruise vendor, the MA would need to look at what their policies cover. It is much better to transfer risk contractually to the cruise operator/vendor (the indemnification clause is important) and to have the MA be listed as an Additional Insured on the vendor's watercraft liability policy.

WEF would look at the contract and see if we could successfully negotiate the transfer of risk. We would not want WEF or the MA to be on the hook for responsibility if there were a drowning if someone fell off the boat, if someone fell onboard and incurred an injury, if there were a fire on the boat, etc. If the vendor would not accept full liability, we probably should not do it.

Also, they may have some sort of waiver for customers who board the ship to sign, a waiver that says the customer is assuming full risk during the cruise, and that the customer would not hold the vendor responsible for certain actions, such as if they fall. The MA Host and WEF would need to look at any sort of waiver, to see if the customer would then want to hold WEF or the MA responsible if they can't hold the cruise line responsible.

MA Host should look at their General Liability and Umbrella policies which would cover injury or property damage. There may be restrictions based on the length of the vessel.

### **Things to keep in mind...**

- Contract with a vendor who is responsible for serving the alcohol and to ensure all local, state, provincial and federal laws are followed.
- In no circumstance should a WEF Staff or MA volunteer be in a position to serve alcohol or purchase alcohol for the purpose of distribution.
- Taxi/Uber/Lyft service or other alternative transportation should be available and communicated to attendees
- The Wednesday event should be limited to a certain set period not to exceed 2 hours
- The Thursday event should be limited to a certain set period not to exceed 4 hours
- Attendees should be reminded that they should drink responsibly and exercise good judgment

# Examples of Welcome Messages from the MA Hosts

## 2024 – Virginia WEA

We are so excited to host you in Old Town Alexandria next week for the Virginia WEFMAX. To assist in your planning, we have included information on specific events for the VA WEFMAX. Please reach out to [Kathy.rabalais@vwea.org](mailto:Kathy.rabalais@vwea.org) if you have any additional questions.

**Weather:** The weather in Alexandria will range from a high temperature of 72 to nighttime lows of 50. *There is a chance of rain each day of WEFMAX, so please bring your raingear!*

### Wednesday, April 10<sup>th</sup> Special Activities

**Alex Renew Facility Tour:** Meet in the hotel lobby by 1:45. We will shuttle to Alex Renew. **PPE:** Steel toe footwear, safety vests and helmets are required at the plant. The facility has supplies onsite but recommend bringing your own if you are able to do so.

**African American Walking Tour of Old Town Alexandria:** Meet in the hotel lobby by 4:25 and join VWEA, WEF and the Manumission Tour Company to travel the streets of historic Old Town Alexandria and hear the little-known stories of Africans and African Americans, both enslaved and freemen, at a time when Alexandria, Virginia was one of early American's main centers for the international and domestic slave trade.

**Ice-Breaker Social:** Join us for a social in the beautiful courtyard of the Alexandrian Hotel at 6:00 pm (an indoor location next to the courtyard will be used if rain is forecasted during the social).

### Thursday, April 11<sup>th</sup> Special Activities

**5K Run or 2-3k Walk:** Those interested in participating in a 5k Run or 2-3k Walk meet in the lobby at 6:15am. Maps are attached and will be available at WEFMAX check-in.

**Dinner Cruise:** We will depart the hotel at 5:15 for a short walk down King Street to the harbor dock. Appetizers, dinner and drinks will be aboard the Cherry Blossom, an authentic re-creation of a 19th Century Riverboat, as well as one of only 6 coast guard certified working sternwheelers in the country. We will begin boarding at 5:30 pm and return at 8:00 pm. The boat is enclosed with the opportunity to take in the views on the decks.

Safe travels to Virginia. We can't wait to see you!

## 2024 – Florida WEA

Greetings to one and all,

Welcome to beautiful St. Petersburg, Florida. Make sure you have packed appropriately for the weather; we are expecting temperatures in the low 90's all week. We wanted to offer up some local places of interest you might want to explore during your stay. The hotel is very close to Tampa Bay and for those that want to get out and get your exercise in the morning we have attached a couple of routes to help you explore and see the beauty of the area. We will be having morning yoga and stretching at the hotel first thing in the morning.

As a reminder the hotel is located at:

Hilton St. Petersburg Bayfront, 333 1<sup>st</sup> St. SE, St. Petersburg, FL 33701

### **Within walking distance:**

The Dali Museum: <https://thedali.org/>

The Museum of Fine Arts: <https://mfastpete.org/>

St. Petersburg Museum of History: <https://spmoh.com/>

The St. Pete Pier: <https://stpetepier.org/> We will have our reception here on Thursday

There are a multitude of restaurants nearby, especially along Beach Drive and along Central Ave. A quick Yelp search will give you a plethora of options.

### **A short Uber ride away:**

Tampa Bay Rays are Playing Oakland: <https://www.mlb.com/rays>

St Pete Beach

### **If you adventure across the bay to Downtown Tampa you can visit:**

Florida Aquarium: <https://www.flaquarium.org/>

Tampa Bay History Center: <https://tampabayhistorycenter.org/>

Tampa Museum of Art: <https://tampamuseum.org/>

Glazer Childrens Museum: <https://glazermuseum.org/>

Henry B. Plant Museum: <https://www.plantmuseum.com/>

A little further get's you to Busch Gardens, Tampa: <https://buschgardens.com/tampa/>

These are just some suggestions, there is lots more to do in the area and we are happy to help with any questions or suggestions.

LET'S GET OUR WEFMAX ON!



**“DRAFT SAMPLE ONLY”**

**WEFMAX in (Host  
City) (Hotel Name)  
(Hotel  
Address)  
(Event Date)**

**WEFMAX Offers a Forum to Share Successes and Lessons  
Learned to Strengthen MAs and WEF**

**WEF Board of Trustees, (names) | WEF HOD Speaker, (name)  
WEFMAX Committee Chair, (name)  
WEF Association Engagement Staff: (names)**

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**(Host name) Board Members:**

**President, (name) | Vice President,  
(name)**

**Secretary/Treasurer, (name) | Executive Director, (name)  
WEF Delegate(s),  
(name)**

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**PROGRAM**

Improving MAs Through... (title)

<b>Wed. (date)</b>	<b>Meet in (room) (time) pm</b>
<b>3:30 – 4:00 pm</b>	WEFMAX REGISTRATION: (room)
<b>4:00 – 5:30 pm</b>	OPENING ACTIVITY: (room)
<b>6:15 – 8:30 pm</b>	ICE BREAKER MEET & GREET SOCIAL: Join (host) Group Photo, have some laughs... meet new friends or catch up with existing friends.

<b>Thur. (date)</b>	<b>WEFMAX Day 1 held in (room)</b>
<b>6:15 am</b>	<i>Early Birds...</i> Join in for a group 5K Fun Run or 2-3K Walk – Leave from the Hotel Lobby. Walk or run at your own pace. (Route maps will be provided)
<b>7:30 – 8:30 am</b>	BREAKFAST (continental or full)
<b>8:30 – 8:40 am</b>	<b>WELCOME</b> (host President)
<b>8:40 – 9:00 am</b>	<b>WEF MESSAGE</b> WEF Board of Trustee, (name) will share update from WEF



<b>9:00 – 9:45 am</b>	IMPROVING MAs THROUGH .... (theme topic presentation by MA)  <b>Presenter:</b> (name) <b>Scribe:</b> <b>Timekeeper:</b> <b>Mic. Helper:</b>
<b>9:45 – 10:00 am</b>	BREAK
<b>10:00 – 11:30 am</b>	MA MODERATED PANEL / SHARING SESSION <b>Topic: (host topic of choice)</b>  <b>Moderator:</b> (name) <b>Scribe:</b> <b>Timekeeper:</b> <b>Mic. Helper:</b>
<b>11:30 – 11:45 am</b>	WEF HOD NOMINATING (OR OTHER) COMMITTEE <b>Presenter:</b>
<b>11:45 – 1:00 pm</b>	LUNCH
<b>1:00 – 2:15 pm</b>	MODERATED PANEL / SHARING SESSION / PRESENTATION <b>Topic:</b>  <b>Facilitator / Presenter:</b> (name) <b>Scribe:</b> <b>Timekeeper:</b> <b>Mic. Helper:</b>
<b>2:15 – 2:45 pm</b>	BREAK
<b>2:45 – 3:45 pm</b>	BRAINSTORMING SOLUTIONS / SMALL GROUP EXERCISE <b>Topic:</b>  <b>Facilitator:</b> <b>Scribe:</b> <b>Timekeeper:</b> <b>Mic. Helper:</b>
<b>3:45 – 4:00 pm</b>	NEXT STEPS – ACTION PLAN <b>Facilitator:</b>
<b>4:00 – 4:15 pm</b>	WEFMAX DAY 1 WRAP AND ADJOURN
<b>4:45 – 11:00 pm</b>	COMMUNITY SERVICE EVENT AND EVENING SOCIAL: (details provided)



# WEFMAX Sponsorship Examples



*The ACWWA is proud to be hosting one of three 2023 WEFMAX events.*

*We will be in downtown Charlottetown, PEI at the Rodd Hotel from May 24-26.*

**WEFMAX** means WEF Member Association (MA) Exchange. This program's mission is to offer a forum to share successes and lessons learned to strengthen MAs and WEF.

Purpose: Organized by WEF for exchange of information and discussions by Delegates, Board Members and Staff of various regional MAs throughout North America.

More information about the Charlottetown WEFMAX can be found at the link below.

<https://www.wef.org/events--education/conferences/wefmax/wefmax-in-charlottetown/>

In addition to the meetings and group discussions at the hotel, we will be promoting our Atlantic Canadian hospitality. The program will include a "meet and greet ice breaker" on Wednesday night at Peake's Quay with a local "Anne of Green Gables" Character in attendance. Thursday our attendees will dine at the New Glasgow Lobster Supper, transported by Coach/Bus. Afterward a Down East Kitchen Party will be held at the Triangle Pourhouse featuring local entertainment. Other activities / guests are yet to be determined/booked.

Attendance is typically in the range of 70-80 delegates, affiliated with the wastewater industry from across the United States and Canada. Most everyone in attendance will be very familiar with attending WEFTEC and many people may have visited your booth in person over the years. Delegates are a mix of municipal employees, engineers, and consultants. Many are in senior positions, leadership roles within their respective fields, and some are tomorrow's leaders.

We are seeking sponsorships in the range of \$500 - \$1000, but welcome any assistance regardless of amount, to assist us with the additional expenses not covered by WEF. Each sponsor will be recognized at specific events (in print and from the podium) as well as on electronic and print communications, and any other opportunities that may arise as the program is developed.

This is a unique opportunity for a select number of companies to promote their services and offerings to a singularly motivated audience. Please take an opportunity to reach out at your earliest convenience as we must finalize bookings no later than May 15, 2023.

Feel free to reach out with any questions and thank you in advance for your considerations.

*Clara Shea*  
*ACWWA Executive Director*

*Dave Galbraith*  
*WEF Delegate, ACWWA*

*Cathy Cameron*  
*ACWWA Past-Chair*

*Emails: [contact@acwwa.net](mailto:contact@acwwa.net)*

*[dave.galbraith@sansom.ca](mailto:dave.galbraith@sansom.ca)*

*[Catherine@scotiatech.ca](mailto:Catherine@scotiatech.ca)*

**\*\*WEFMAX stands for Water Environment Federation (WEF) Member Association (MA) Exchange.**

**\*\*ACWWA is a Member Association of WEF.**

**WEFMAX South Carolina  
Charleston, SC  
May 21-23, 2013**

*Y'all Come!*

**What is WEFMAX?**

WEFMAX stands for WEF Member Association Exchange. It is an annual program offering Member Association leaders an opportunity to attend one of four meetings each year that provides a forum to learn what is new from WEF and provides sessions for ongoing exchange of MA ideas. Member Associations volunteer to jointly sponsor with WEF a WEFMAX meeting. WEASC was one of the four Member Associations selected to host a WEFMAX.

**Who attends WEFMAX?**

WEFMAX is attended by the MA Officers, Committee Chairs and Staff from all across the country. There are usually 45-60 attendees including WEF support staff

**When is WEFMAX?**

WEFMAX South Carolina will be May 21-23, 2014. Those dates are the Wednesday through Friday before the Memorial Day weekend.

**Where is WEFMAX South Carolina?**

The host committee selected Charleston as the host city. Arrangements have been made with the Francis Marion Hotel in the historic downtown district for the accommodations necessary for the meetings, guest lodging and "meet and greet" reception.

**What do you do at a WEFMAX?**

The WEFMAX program format is the same at all four meetings but the content varies at each meeting. There are updates from WEF Officers and staff about programs and opportunities available through WEF. WEF uses WEFMAX to gather feedback from MA's on the programs, support and educational opportunities they need. Members Associations who attend provide presentations on their programs too. Topics in the past have included Public Outreach and Communication, Operator Development and Engagement, Strategic Planning and Financial Stability, and Leadership Development and Succession Planning. Networking is a big part of WEFMAX as time is built into the schedule for interaction, dialog and idea exchange. There is some fun worked into the event, the Host MA provides a meet and greet reception on

Wednesday evening to welcome the attendees and they host a social event on Thursday evening.

In addition, WEFMAX South Carolina was selected to host a WEF Operator Workshop on Wednesday. Charleston Water has graciously offered to host the training session that will be made available to WEASC members at their Plum Island Reclamation Facility. Jeanette Brown, Senior Scientist from the University of Connecticut, licensed environmental systems operator, and professional engineer will be guest instructor at this workshop.

**Why do we need your support?**

WEFMAX South Carolina will be jointly sponsored by WEF and WEASC. WEF’s financial contribution does not cover the entire expense of hosting the meeting and the host MA is financially responsible for all expenses not covered by WEF.

**How will your support be used?**

We want to showcase the WEASC and South Carolina and make our guest feel welcome so they leave South Carolina with fond memories of gracious southern hospitality. As mentioned earlier, we will be hosting a meet and greet reception on Wednesday evening. We want to provide our guests a small gift bag. We will also provide refreshments at the networking breaks. We are considering several ideas for making Thursday evening a memorable event. Under consideration is a carriage ride to and dinner at one of Charleston’s restaurant, a harbor cruise and dinner, or a Low Country Boil at the Charleston Maritime Center. The financial support we receive from our sponsors will have bearing on what we decide to provide.

**How can you help?**

We have a tiered sponsorship program established so you can easily work a contribution into your budget.

Gracious Southern Hospitality:	\$500.00
Welcome to South Carolina:	\$250.00
Won’t y’all have something to eat and drink:	\$100.00
Make yourself at home:	\$50.00
Education Supporter of Operator Workshop	\$150.00

Any funding raised that exceeds what is needed to cover expenses will be redirected to the Legacy of Learning principle fund.

We will gladly accept contributions to our Welcome bags. If you have pens, pads, letter openers, etc. with your company logo we will put them in the gift bags along with other items that represent South Carolina.

**What do you get for your sponsorship?**

Recognition! Your support will be noted on placards at the different functions as well as being mentioned throughout the meeting. A list of sponsors will be included in the gift bags. We will also include recognition of our sponsors in the WEASCJournal.

**In conclusion**

WEASC is honored to have been selected as a Host MA for WEFMAX. We have marketed this meeting with the slogan “WEFMAX South Carolina – Y’all Come!” We look forward to being able to showcase our MA, South Carolina, Charleston and gracious southern hospitality. Your support will play an important role in being able to do just that and will be greatly appreciated.

# PRODUCING EFFECTIVE POWERPOINT PRESENTATIONS

PowerPoint presentations can be a huge enhancement to your lecture/speech. Why not make them as effective as possible? There are no points for pretty.

WEF will provide a PowerPoint slide template to provide a consistent look and feel to slides. For MA sharing sessions (sharing content specific to the speaker's MA), the MA's slide template may be used.

- **Rule # 1 – Keep slides SIMPLE**
- Expect lighting conditions to be poor
- Remember that the projected version will be much more difficult to see than what appears on your monitor while creating the show
- Beware of the legibility of canned wizards
- Some color combinations are very difficult to see when projected
- Avoid red on blue, avoid red on green, avoid red on brown
- NO PASTELS – EVER (you're not decorating your home)
- Use simple fonts
- Use largest font possible - every slide  
**MINIMUM** 36 pt font - larger if possible
- Consider using more than one slide for lists (to be able to use large fonts)
- Put YOUR NAME and contact information on the final slide
- Leave that slide up for as long as possible
  
- Be careful with pictures, avoid ones that are "busy"
- Make pictures as large as possible
- Test pictures in a projection setting (not just on your computer screen)
- If there is an embedded video, do not assume that audio will work; have a backup slide or be ready to verbally explain
  
- Avoid graphs whenever possible
- Avoid charts whenever possible
- Avoid tables whenever possible
- Provide a hard copy for audience if you must use a graph, chart or table
  
- Be sure to use spellcheck
- When using proper nouns be certain the spelling is correct
- When providing statistics or other "facts," be certain they are correct

The human eye can see some color combinations better than others. There is a reason why road signs are the colors that they are. There is a reason why the Yellow Pages were yellow.

Studies show that the color combinations listed below are the best to use (ranked in order of legibility of letters from a distance).

- |                    |                   |                   |
|--------------------|-------------------|-------------------|
| 1. Black on yellow | 4. White on blue  | 7. Blue on yellow |
| 2. Black on white  | 5. Yellow on blue | 8. White on green |
| 3. Yellow on black | 6. Green on white |                   |



## Suggested Guidelines for WEFMAX Moderator

The role of the moderator is to introduce the topic, the support helpers, keep conversations on track, sometimes restate a question or answer as needed, make sure that no one is monopolizing the conversation and allow as many people to talk as time allows.

1. Moderates the session
2. Keeps session on time (with timekeeper's help)
3. Opens the session with brief overview of the topic
4. Introduce the Session topic, the support group (scribe, mic helper, and time keeper)
5. Introduce the Presenter (no bio required)
6. Introduce the second presenter if applicable etc.
7. Each session will have open discussion time
  - a. Ask presenters to come to the front of the room for Q&A
  - b. Moderator
    - i. Calls on people/keeps track of those waiting to speak (with help of Microphone Handler)
    - ii. Reminds attendees to use microphone so everyone can hear
    - iii. Remind attendees to stand, state name, organization/MA
8. Moderator will thank the presenters, scribe, microphone helper, and time keeper.



## Suggested Guidelines for WEFMAX Scribes

### **Responsibility:**

The scribe is the notetaker for the topic sessions during WEFMAX. They take notes on the presentation then capture exchange, comments, questions and interaction of the discussions after the presentations.

With the support of the Microphone Helper obtain the names and specific MA in order to get back to the individual with additional responses, information or questions in regard to certain topics. The Microphone Helper is critical for managing the discussion to ensure the person states their name and MA before asking a question, responding or making a point.

### **Method:**

- Use template provided by WEF staff and refine according to your WEFMAX specifics.
- Have consistent typists as coauthors to help with scribing duties (preferably 1 per session)
- At WEFMAX be sure to highlight the name of the person speaking and their association. Note the following items:
  - Highlights of the presentation using a bulleted format
  - Comments
  - Questions with corresponding responses
  - Summary items
- Consolidate scribe notes within 1 week.
- Send Final Draft to WEFMAX Staff, both in PDF and Word format within 2 weeks of WEFMAX event.

### **Materials Required:**

- Template
- Laptop
- Power Source
- USB with Notes & Template
- Detailed WEFMAX program with everyone's name and MA

### **Suggestions:**

- Have each session in a separate template document saved on a USB drive in case something happens to the file while scribing or after.
- Making sure all scribes follow the same format will make consolidation much easier.



## Suggested Guidelines for WEFMAX

### Microphone Guideline

1. Microphone handler will deliver and retrieve microphone from attendee so their questions and comments can be heard by the other attendees. Facilitator should restate or assure that the general guidelines as noted below are followed each session:
  - Each audience member should use the microphone when speaking. This is either when a question is asked or answered. Individuals in 'front' of the person speaking can generally hear the question but for the benefit and courtesy of those 'behind' the person please use the microphone.
  - Prior to speaking please state your name and which MA you are with. This allows the scribe to appropriately track comments and suggestions. Mic handler should remind them if they forget.
  - Please stand up and speak clearly into microphone
2. Microphone Use and Quantity should be based upon the size of the group / location.
  - Large Rooms / Large Group
    - One Microphone for the presenter / speaker
    - Two 'traveling' mics for those in the audience
    - Have at least two helper to move the mics around in the audience
  - Medium Rooms / Medium Groups
    - One Microphone for the presenter / speaker
    - One 'traveling' mic for those in the audience
    - Have at least one helper to move the mics around in the audience
    - This size of room / audience may not require each person to have a mic in the audience
  - Small Rooms / Small Groups
    - One Microphone for the presenter / speaker
    - This size of room / audience may not require each person to have a mic in the audience



## Suggested Guidelines for WEFMAX Timekeepers

1. Have specific time reminders that include:
  - 10 minutes (The 10 minute one would be the initial awareness of time)
  - 5 minutes (The 5 minute one is the warning)
  - 1 minute (The 1 minute would be “wrap up now”)
2. If possible, use placards that have been developed (Provided by WEF) with a very large dark font and try to have the placards about the size of a regular sheet of paper.
3. Keep the speakers on task in terms of the specific time limits
4. Seat yourself in a place that will allow you to hold up time placards, yet not in a position that you take away from the speaker and audience’s momentum. The back of the room is great for this.
5. If you plan on participating in the conversation, try to ask your questions early so you can still maintain the time.
6. Make sure you have a good watch or cell phone for timing purposes.

### COMMENTS, QUESTIONS AND SUGGESTIONS

- Facilitator must let all presenters know of the importance of staying on time at the very beginning of the WEFMAX session and all participants respected the time constraints.
- Keep close attention on the time to ensure the presentation stays on schedule
- Ask someone to watch the time with you so you can also participate in the discussions.
- Hold up the time based on how long the presentation is taking. Use a little judgment if one presentation is longer and another is shorter. If presentations are ahead of schedule be flexible in the time limitations
- Caution the presenters to begin their wrap-up with the 5 minute warning. 5 minutes is too short to catch up with additional presentation information.



## **Guidelines for Guest**

The HOD WEFMAX Committee works diligently with host MAs to provide an enjoyable and educational experience at all WEFMAX events. Social events are planned to provide networking opportunities and a chance to make new friendships. These events provide a time for attendees to introduce their guest to peers within WEF. The associated costs with these can be significant for the host MA to cover. While guests are more than welcome, to maximize the opportunities provided, a guest fee of \$100.00 will be charged and will be retained by WEF.

## WEFMAX 2026 Committee and MA Host Contacts

WEFMAX Committee			
Name	Email	Mobile Phone	WEF - Role
Lucas Billesbach	<a href="mailto:lucasbillesbach@embris.com">lucasbillesbach@embris.com</a>	402.319.5951	Chair
Candice Au-Yeung	<a href="mailto:cauyeung@everettwa.gov">cauyeung@everettwa.gov</a>		
Marlo Davis	<a href="mailto:mdavis@sbwrd.org">mdavis@sbwrd.org</a>		
Yvan Breault	<a href="mailto:Yvan.breault@longueuil.quebec">Yvan.breault@longueuil.quebec</a>		
Emily Dong	<a href="mailto:edong@brwncald.com">edong@brwncald.com</a>		
Linda Leopold	<a href="mailto:lindaleopold@comcast.net">lindaleopold@comcast.net</a>		
Erin Longworth	<a href="mailto:longworthe@ae.ca">longworthe@ae.ca</a>		
Tina Sheikhzeinoddin	<a href="mailto:tsheikhzeinoddin@hazenandsawyer.com">tsheikhzeinoddin@hazenandsawyer.com</a>		
Emily Prescott	<a href="mailto:eprescott@sacomaine.org">eprescott@sacomaine.org</a>		
WEFMAX Host: Réseau			
Name	Email	Mobile Phone	MA - Role
Yvan Breault	<a href="mailto:Yvan.breault@longueuil.quebec">Yvan.breault@longueuil.quebec</a>		Liaison to Committee
Dominique Adam	<a href="mailto:dadam@reseau-environnement.com">dadam@reseau-environnement.com</a>		
WEFMAX Host: Pennsylvania			
Name	Email	Mobile Phone	MA - Role
Linda Leopold	<a href="mailto:lindaleopold@comcast.net">lindaleopold@comcast.net</a>		Liaison to Committee
Doug Pike	<a href="mailto:dpike@phenvironmental.com">dpike@phenvironmental.com</a>		
Ashley Mohn	<a href="mailto:ashleymohn@pwea.org">ashleymohn@pwea.org</a>		
Jim Degnan	<a href="mailto:Jim.degnan@hampton-pa.org">Jim.degnan@hampton-pa.org</a>		
Ann Marie	<a href="mailto:annmarie@millirongoodman.com">annmarie@millirongoodman.com</a>		
Don Brown	<a href="mailto:Dbrown3536@aol.com">Dbrown3536@aol.com</a>		
WEFMAX Host: Pacific Northwest			
Name	Email	Mobile Phone	MA - Role
Candice Au-Yeung	<a href="mailto:cauyeung@everettwa.gov">cauyeung@everettwa.gov</a>		Liaison to Committee
Joe Kernkamp	<a href="mailto:jkernkamp@hydrotek.net">jkernkamp@hydrotek.net</a>		
WEF Staff			
Name	Email	Mobile Phone	Role
Kelsey Hurst	<a href="mailto:khurst@wef.org">khurst@wef.org</a>		
Amy Kathman	<a href="mailto:akathman@wef.org">akathman@wef.org</a>		