



WEBCAST GUIDANCE DOCUMENT

Developed by the CLC Guidance Document Taskforce

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Executive Summary

WEF is dedicated to advancing the professional growth and expertise of its members and webcasts are one way to meet this. Webcasts provide a convenient way to deliver the latest industry trends, practices, technologies and solutions to water professionals. Webcasts give participants the ability to view live presentations on the web and provides viewers with the ability to submit questions directly to the speakers. Recommended professional development hours (PDHs) may also be earned for participating in a webcast.

This webcast guidance document was developed to give committees and volunteers an overview of the webcast development process. The content is intended to help readers better understand the process and bring some consistency to the production, while at the same time respecting the flexibility that each committee currently has in the development of individual webcasts. The document briefly describes:

- Roles and responsibilities of webcast participants and WEF staff
- Webcast topic selection
- Review procedures
- Timetables
- Presentation and day-of-webcast logistics

The Appendix includes a variety of support information including example slides, call agendas, checklists, and key forms.

Webcast Development & Roles and Responsibilities

Presented below in Table 1 is a summary of the basic process for creating a webcast and a general description of the roles and responsibilities of those involved in webcast development. Please see Appendix 1 for a deliverables checklist.

Table 1: Webcast Development Overview

Task	Who's Responsible
Organize webcast calendar and disseminate to committee chairs	Webcast staff
Follow-up with chairs and co-chairs	Webcast staff
Submit title and description	Committee leadership or webcast subcommittee leadership
Send title and description to sales staff	Webcast staff
Obtain sponsorship	Sales staff
Request product creation, create registration, develop the webpage	Webcast staff
Create the product	Finance staff
Submit list of speakers and name of moderator	Committee leadership or webcast subcommittee leadership
Ensure speakers submit speaker release form	Organizer and webcast staff
Market webcast	Marketing staff and webcast staff
Schedule kick-off call	Webcast organizer
Create a OneDrive; invite speakers, moderator and organizer; upload slide template, speaker release forms, and schedule	Webcast staff
Attend kick off call	Webcast staff, moderator, organizer, committee liaison, and speakers attend- webcast staff and organizer run
Disseminate kick off call notes	Organizer or webcast staff
Schedule practice webcast	Organizer
Develop slides	Speakers
Review draft slides	Committee - webcast organizer to organize
Attend practice webcast	ALL speakers, moderator, organizer, webcast staff, committee liaison
Schedule separate technology check w/sponsor as needed	Webcast staff
Finalize slides: incorporate reviewer comments, check for spelling errors, ensure all items are displaying properly	Speakers
Compile finalized slides	Committee liaison
Post webcast reminder on WEF.COM	Webcast staff
Answer perspective attendee questions	Webcast staff and customer service staff
Ensure sponsor logo (if applicable) is on all slides	Webcast staff

Task	Who's Responsible
Upload slide handouts to website and edit the GTW reminder emails to include	Webcast staff
Send panelist invites and reminders to speakers	Webcast staff
Run report and send reminder to everyone that ordered but didn't register	Webcast staff
Setup webcast room	Webcast staff
Call into webcast early	Speakers and moderator, webcast staff, committee liaison
Convert recording, compile questions report, upload recording, edit GTW email, edit website and AMS to indicate the webcast has passed, create product on LMS, upload webcast to WEFCOM, create PDH form and PDH instructions, send email to speakers with question report, if sponsored, send list of attendees to sponsor	Webcast staff

Note: Organizer is often also the moderator.

Legend:

Committee	Staff	Both
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Sample Calendar for Moderator and Speaker Deliverables

May 2017

SU	MO	TU	WE	TH	FR	SA
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

May 18th – Title and Description Due
 May 25th – List of Speakers Due

June 2017

SU	MO	TU	WE	TH	FR	SA
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1

June 1st – Speaker Release Forms Due
 Week of June 5th – Kick-off call

July 2017

SU	MO	TU	WE	TH	FR	SA
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

July 17th Draft Slides Deadline
 July 31st – Peer Review Completion Deadline

August 2017

SU	MO	TU	WE	TH	FR	SA
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2						

Week of August 7th – Practice Webcast
 August 10th – Final Slides Due
 August 16th – Webcast!

Types of Webcasts

Annually Scheduled

There is an average of 25 technical webcasts per year put on by many of the WEF technical committees. Currently, each interested committee receives a date, except for the three largest committees: Collection Systems, Municipal Resource Recovery Design (MRRDC), and Plant Operations and Maintenance (POMC), who (in 2017) each received two dates. Committees that desire additional dates are encouraged to submit the webcast proposal form (provided in Appendix 2) to be added to the waitlist.

Waitlist

Occasionally there is a need to cancel a scheduled webcast. For example, if an assigned committee (or webcast organizing group) has not met its organizational obligations seven weeks before a scheduled webcast, the assigned committee will forfeit the date and the date will subsequently be assigned to a webcast on the waitlist.

Entry on the waitlist is obtained by submission of the webcast proposal form. The waitlist is first come, first serve.

Partnered webcasts

There are annually six partnered webcast with the Water Environment & Reuse Foundation (WE&RF), which will sometimes engage a related WEF technical committee. In this case, WE&RF takes the lead on selecting the topic matter and providing speakers.

There are annually two partnered National Association of Sewer Service Companies (NASSCO) webcasts per year. NASSCO takes the lead on selecting the topic matter and providing speakers as well, but the WEF Collection Systems committee is involved.

There are four eShowcase webcasts per year that are utilized by companies to showcase their product(s). WEF does not influence the content.

Webcast Calendar

The calendar is developed every year prior to WEFTEC, for the upcoming calendar year.

- All holidays, competing WEF events, and July and August (typical holiday months) are blocked off the calendar
- Cross promotion opportunities are identified. For example, each webcasting committee with a specialty conference will have a webcast scheduled 3-5 weeks before the start of the conference. If a committee is publishing a WEF book, then a webcast will be scheduled for shortly before the book's release.
- In order to highlight different subject areas over a given time period, WEF uses some general guidelines for the schedule. For example:
 - Webcasts from the same committee are scheduled as far apart as possible; and,
 - WE&RF webcasts are spread evenly across the calendar year
- The seven key production deadlines are outlined below in Table 2 with dates adjusted in order to avoid holidays.
- The committee chairs and subcommittee chairs are notified of the schedule and webcast deadlines by email in September of each year (sample email in Appendix 3). A reminder email is sent a few weeks before the first deadline in each case.

Table 2: Webcast Production Schedule

TASK	TIMELINE
Date of Webcast	Typically, a Wednesday
Slides Finalized and Compiled by Liaison	2 days before
Final Slide Deadline	Friday before webcast
Practice Webcast	Monday or Tuesday before webcast
Peer Review Complete	1 week before practice webcast
Draft Slides Due	2 weeks prior to peer review deadline
Kick-off Call	7 weeks prior to webcast
Speaker Release Forms Due	1 week prior to kick-off call
List of Speakers	2 weeks after title and description
Title and Description	3 months prior to webcast

Webcast Topic Selection

Each WEF committee assigned a webcast slot is responsible for the webcast content and speakers. The methodology used by each committee to choose the topic and speakers differs between committees. It is not the purpose of this document to specify or layout a single approach. Rather, this section has been written to outline, in general terms, the range of processes used by some of the committees so that the reader better understands the various formal and informal processes that might be in operation.

For instance, some committees have formed sub-committees that deal with webcasts specifically. In these cases, topics are identified or proposals are sought from the committee membership and the final webcast decision is determined by the webcast sub-committee. In this process, the sub-committee approves the topic, the speakers and reviews the presentation material prior to the event. However, not all committees have such a formal process. Other committees rely on a more ad hoc approach whereby interested parties submit a proposal or lobby the committee for the webcast slot. In this approach, the chair (or proposer) of the webcast takes on the responsibility to organize the speakers and ensure the presentation material is properly reviewed. In this approach, the topic and webcast speakers might be assigned through discussions with the committee management or the webcast chair might be given more autonomy to make those decisions.

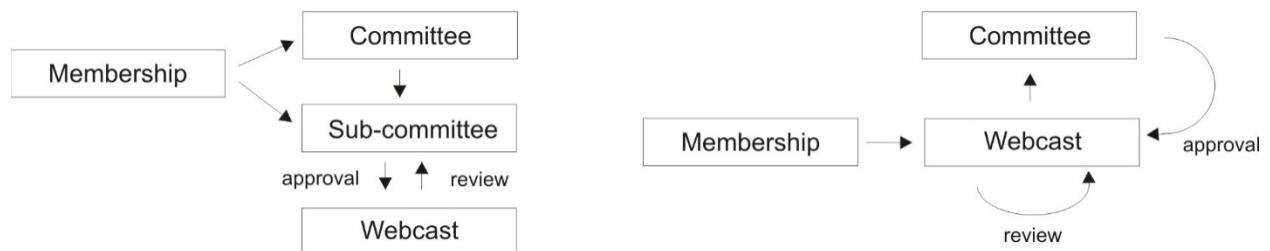


Figure 1: Schematic depiction of two different approaches taken by different committees.

Because the process in each committee is different, those wishing to organize a webcast should contact their respective committees to determine that committee's specific webcast process. However, irrespective of the methodology used by a particular committee, a starting point for topic selection may include "hot topics" at the time; an introduction to a soon-to-be or recently released MOP; or maybe an introduction to a workshop to be held at a WEF conference. The time commitment by WEF staff, the speakers, and the committee members involved is not insignificant, so the goal, irrespective of the methodology used, is to choose a topic of interest and committed speakers that can produce a high quality product.

Webcast Development

Composition

Many WEF webcasts consist of 3 speakers and a moderator. An example webcast for this case is shown below:

- WEF Staff Housekeeping (2 minutes)
- Moderator Introduction (2-5 minutes)
- Speaker 1 (20-25 minutes)
 - Q&A (5 minutes)
- Speaker 2 (20-25 minutes)
 - Q&A (5 minutes)
- Speaker 3 (20-25 minutes)
- Q&A (15 -20 minutes)
- Corporate Sponsor (if applicable) (5-8 minutes)
 - (If a webcast is sponsored, the schedule must allow 5-8 minutes for a corporate speaker to discuss a corporate topic at the end of the webcast, after the Q&A.)

Experience indicates that webcasts can be conducted effectively with as many as five speakers or as few as two speakers. As a result, the webcast schedule will need to be adjusted for each specific case with the understanding that adequate time for Q&A must be included at the conclusion.

Speaker Release Forms

For legal reasons, all speakers must sign the speaker release form. Those forms are due before the kick-off call to give the committees time to replace a speaker if the form is not submitted. The speaker release form is included in Appendix 4.

Kick-Off Call

The purpose of the kick-off call is for the speakers to meet, discuss the content that will be covered, agree on who will cover what content, determine the order the speakers will present in, and clarify how long each presentation will be. During this call WEF will also briefly explain the technology that will be utilized. A sample kick-off call agenda is included in the Appendix 5.

Slide Development

To facilitate slide development, WEF webcast staff will create a OneDrive folder and upload the slide template. Speakers are responsible for creating their own slides within the template. Speakers should ensure accurate spelling and grammar, and that items such as bullets, text and images are properly formatted. Additional guidelines for presentations include:

- Each speaker should have an introductory slide with their name and affiliation, and optionally their picture and company logo
- If a webcast is sponsored, the sponsor’s logo must appear on every slide (except those slides presented by U.S. Government employees)
- ‘Text heavy’ slides are not typically appealing to an audience; the use of images and visual graphics is encouraged
- Animations should be kept to a minimum
- Use of video is not recommended because often it does not display well; but if a presenter would like to try, it can be tested on the practice call and/or prior to the live event on the day of the webcast
- Sample slides are included in Appendix 9.

Webcast Peer Review

All webcasts should be peer reviewed one week prior to the practice webcast. Shown below in Table 3 is a summary of tasks that should be performed in the peer review.

Table 3: Peer Review Process

TASK	RESPONSIBILITY
Reach out to committee members for volunteers or recommended slide reviewers.	Webcast Organizer
Select slide Review Team. The review team should contain at least three qualified subject matter experts	Webinar Organizer
Finalize draft and distribute slides to the Review Team. <ul style="list-style-type: none"> • Establish ground-rules for reviewing slides. • Establish suggested roles for reviewers: <ul style="list-style-type: none"> ○ Flow/Organization ○ Visual Features ○ Content/Technical Accuracy • Communicate preferred method of delivering comments (paper, digital, track changes, etc.) • Set a deadline for receipt of comments. 	Presenters / Webcast Organizer
Obtain and consolidate comments from Review Team.	Webcast Organizer
Deliver slide comments to the Webcast Team to address comments.	Webcast Organizer
Update presentation based on feedback.	Presenters
Distribute updated slides to Review team for final read-through.	Webcast Organizer/Review Team
Finalization of Webcast Slides.	Presenters

Visit Appendix 6 for the reviewer checklist.

Practice Webcast

The primary purpose of a practice webcast is to familiarize the speakers with the technology and identify presentation problems. During this practice, speakers are encouraged to *briefly* go over their slides so that any issues with their presentations can be identified and corrected. Because of this, the practice webcast normally takes place between two and three days before the final slides are due. The practice call checklist is included in the Appendix 7.

Sponsorship

Webcast sponsorship is available on a first come first serve basis. A tentative calendar with the general topic for each webcast is determined September of each year for the following calendar year and that information is distributed to the sales team. The due date for the title and description of all webcasts is 3 months before the live webcast date to enable distribution of information to potential sponsors as early as possible. Once submitted, the information is posted on the webcasts website and distributed to the sales team.

Benefits of sponsorship include: sponsor's logo on all marketing for the webcast (including on the webcasts' website), 5-8 minutes to present to attendees on topic of choice at the end of the webcast, sponsor recognition in live and archived webcast, and primary contact information made available to all registered sites.

Final Slides

Speakers are responsible for submitting finalized content to the WEF staff liaison. The slides will be compiled, and presentation handouts will be uploaded to the WEF website. The compiled slides and handouts should be uploaded two days before the date of the webcast to provide the attendees time to review the material. This means that the speakers must submit their slides to the staff liaison three business days before the webcast.

Day-of Webcast Roles and Responsibilities

On the day of the webcast, speakers and moderators must login at least 30 minutes before the live event to conduct one final test of the logistics and to ensure things are working properly and that everyone knows their roles, responsibilities and cues.

Table 4 summarizes the day-of webcast roles and responsibilities and the checklist below provides guidance on individual presenter day-of preparation guidance.

Table 4: Presentation Roles

TASK	RESPONSIBILITY
General Introduction	WEF Staff
Specific Webcast and Speaker Introduction	Webcast Moderator
Manager of Slides	WEF Holds Slides on their computer and gives keyboard and mouse controls to speakers.
Management of Q&A Questions	Webcast Moderator
Proctor (ensures webcast is on track and on time)	Webcast Moderator

Day of Webcast Preparation Checklist	
<input type="checkbox"/>	Use the restroom before the webcast begins. Two hours can be a long time on a full bladder.
<input type="checkbox"/>	Fill up your water bottle.
<input type="checkbox"/>	Have a snack available.
<input type="checkbox"/>	Confirm a stable internet connection. Consider having a hard-wire backup if you regularly use wireless.
<input type="checkbox"/>	Setup in a quiet room, preferably a private office or a conference room.
<input type="checkbox"/>	Consider using a headset or a conference call-specific land line phone to ensure quality audio.
<input type="checkbox"/>	Print out a hardcopy of the presentation in case something goes wrong with your computer, you still have the slides to work off of.
<input type="checkbox"/>	Have backup batteries for you mouse, if you need the mouse to navigate your slides.
<input type="checkbox"/>	Place cell phones on silent, land lines on do not disturb, and be sure to mute your line when you are not speaking.

Delivery

During the live event, WEF controls the GoToWebinar (GTW) platform, and displays the slides saved on the WEF server. WEF staff will sequentially give each speaker keyboard and mouse control of that saved file during the webcast so they can flip through their own slides at the appropriate time. This control is passed by WEF from one speaker to the next while the moderator introduces each speaker.

During the webcast, attendees are encouraged to enter questions in the GTW question pane. The moderator sees all the questions as they come in and will verbally direct those questions to the speakers during the Q&A session(s). GoToWebinar also has a chat feature that allows speakers/moderators/and WEF staff to communicate with each other throughout the webcast as needed.

For an updated list of system requirements for speakers (“staff”), please visit:

https://support.citrixonline.com/en_US/Webinar/all_files/G2W010024

Post Webcast Debrief

After the webcast has ended staff will send speakers, moderators, and organizers the final statistics and a report of all of the questions that were asked during the webcast.

24 hours after the webcast has ended all webcast registrants will receive an email with recommended PDH instructions. Sample PDH instructions are included in Appendix 8.

Appendix

Appendix 1: Sample Deliverables Checklist

Webcast Task Organization			
Tasks:	Due:	Assigned to:	Complete:
Initial Steps:			<input checked="" type="checkbox"/>
Reserve the IT room			<input checked="" type="checkbox"/>
Obtain the title and description, update the "webcast info for sales" sheet, send to Nic			<input checked="" type="checkbox"/>
Populate the product creation spreadhseet and send to finance			<input checked="" type="checkbox"/>
Create registration page in GoToWebinar			<input checked="" type="checkbox"/>
Create the page on the CMS: outline that registration won't open until 6 weeks out. Mark on calender!			<input checked="" type="checkbox"/>
Personify: add registration link in description; make page live			<input checked="" type="checkbox"/>
Go into the CMS: update the "reg link" with the order link, add clear instructions			<input checked="" type="checkbox"/>
Webcast Development			<input type="checkbox"/>
Setup, or encourage moderator to setup, the kick-off call.			<input checked="" type="checkbox"/>
Create the OneDrive and upload the slide template and speaker release form			<input checked="" type="checkbox"/>
Run the kick-off call.			<input checked="" type="checkbox"/>
Compile slides. If the event was sponsored, be sure to add sponsor logo to slides! Create and upload the presentation handouts			<input type="checkbox"/>
Setup practice webcast.			<input checked="" type="checkbox"/>
Run the practice.			<input type="checkbox"/>
Send speaker invites to practice morning of.			<input type="checkbox"/>
Day of the Webcast:			<input type="checkbox"/>
Run the reports and email everyone that has ordered but has not confirmed reg			<input type="checkbox"/>
Edit the introduction script			<input type="checkbox"/>
Setup the PDHs			<input type="checkbox"/>
Send out the invites to the speakers			<input type="checkbox"/>
Create the waiting room			<input type="checkbox"/>
After the Webcast:			<input type="checkbox"/>
Add video to GTW (do first)			<input type="checkbox"/>
Add the video to WEFCOM			<input type="checkbox"/>
Add the video to the LMS			<input type="checkbox"/>
Create the product on the LMS. Publish.			<input type="checkbox"/>
Edit the CMS			<input type="checkbox"/>
Edit Personify			<input type="checkbox"/>
Edit the 24 hour after message to include the PDH link, the link to the product on WEFCOM, and the purchase page on the LMS			<input type="checkbox"/>
If the event was sponsored, send the attendee report to the sponsors with a one-time use reminder. A few weeks later, follow up with a full report			<input type="checkbox"/>
Send thank you email to presenters			<input type="checkbox"/>

Speaker Checklist:									
Speaker Name:	Speaker Email:	Speaker Release Form:	Bio:	Picture:	Powerpoint:	Approved Dry Run Date:	Dry Run Date:	Powerpoint Final:	Initials:
Daren Williams (DCWillia@vbgov.com)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Dennis Piven (dpiven@aegion.com)		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Gordon Baldwin (gbaldwin@heitkamp.com)		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Ted DeBoda (Ted.Deboda@NASSCO.org)		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
Will Markey (wmarkey@eheitkamp.com)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>	

Appendix 2: Webcast Proposal Form

The WEF Webcast Program:

An exceptional way to share your knowledge!

Committee(s)/Organization(s) Proposing:

Proposed Webcast Moderator:

Name:

Title:

Organization:

Phone:

Email:

Confirmed Speakers (3-5 speakers is suggested):

1. Name:

Title:

Organization:

Phone:

Email:

2. Name:

Title:

Organization:

Phone:

Email:

3. Name:

Title:

Organization:

Phone:

Email:

Topic of Interest:

Title of Webcast:

Five to Seven Sentence Description of Webcast:

Three to Four Bullet Points Briefly Highlighting Webcast Topic (Used on Promotional Materials):

Length of Webcast:

1.5 Hours

Two Hours

Order of Webcast Topics/Speakers:

Relevance of topic to WEF Members:

Possible Audiences Interested in This Topic:

Potential Sponsors:

Other Comments or Information

Point of Contact for Webcast (usually the moderator):

Name:

Title:

Organization:

Phone:

Email:

Completed forms should be submitted to the [community chair](#) with a cc to Steven Massa, WEF Manager of Online Learning. Email: webcasts@wef.org

Appendix 3: Sample Initial Email

Hello Jeremy, Hello Ian,

I'm Heidi, I manage the webcast program at WEF. I like to email chairs before WEFTEC with your 2017 webcast dates and the associated deadlines.

The chairs, vice-chairs, or webcast subcommittee assign a webcast organizer (who is usually also the moderator) to help WEF lead the development process. The chairs usually also take the lead and choosing the topic and description of the webcast and assigning speakers.

Lewis or I will reach out to you in January with more information. For your reference I have attached the webcast proposal form and the list of duties for participants. If you'd like any more information at this time, please just let us know.

Committee	Industrial
Date of Webcast	5/10/2017
Final Slide Deadline	5/4/2017
Practice Webcast Week of	5/1/2017
Peer Review Completion Deadline	4/24/2017
Draft Slides Deadline	4/10/2017
Kick-Off Call Week of	3/20/2017
Speaker Release forms Due	3/13/2017
List of Speakers Due	2/23/2017
Title and Description Due	2/9/2017

Have a safe trip to New Orleans,

Heidi Tierney
eLearning Manager
Water Environment Federation
601 Wythe Street
Alexandria, VA 22314
703.684.2400 x7440

Appendix 4: Speaker Release Form



Webcast Speaker Release Form

Webcast Title:

Speaker:

Live Event Date:

Please Read Entire Form Carefully Before Signing

For good and valuable consideration, the receipt of which is hereby acknowledged, the above identified speaker hereby irrevocably assigns to the Water Environment Federation® (“WEF®”) an irrevocable, royalty-free license to the Work identified above. WEF shall have the right to record the presentation and publish the Work in any media, in whole or in part, and distribute it, and/or license or otherwise allow third parties to distribute the work in whole or in part, for free or for sale.

My presentation will not, to the best of my knowledge, violate any proprietary or personal rights of others (including any copyright, trademark and privacy rights), is factually accurate, and contains nothing defamatory or otherwise unlawful. I have the full authority to enter into this agreement and have obtained all necessary permissions or licenses from any individuals or organizations whose material is included or used in my presentation.

WEF acknowledges that Author retains copyright of the Work.

Authorized Signature (Speaker)

Title of Authorized Signee

Date

GOVERNMENT EMPLOYEES ONLY

(Only sign this portion of the form if the identified work in this release was created by an employee of the Government acting within the scope of his official duties. If your work was performed under a government contract but not by a government employee and/or any of the co-authors are not government employees, do not fill out this section.)

Author certifies that he/they were employees of the U.S. government and that he/they created the above identified Work as part of their official duties and the Work is therefore a “work of the U.S. Government” not subject to U.S. copyright protection.

Authorized Signature

Title of signee

Name of Government Organization

Date form signed

Appendix 5: Sample Kick-Off Call Agenda

1. Thank you everyone
2. Run through presenter introductions
3. Order of speakers
 - a. Amount of time for each speaker and q&a length (i.e. 25 min, 5 min q&a)
4. Content
5. Run through deadlines and discuss best dates for subsequent calls
6. Webcast fees / sponsorship
7. Template
 - a. What to include
 - i. Logos
 - ii. Animations
 - iii. Pictures
 - iv. Personal lessons learned
 - b. Head shot
 - c. Brief bio
 - d. Copyright form

Presentation topics (in no particular order):

-
-
-
-

Speaker 1
Speaker 2
Speaker 3
Speaker 4/Moderator

Appendix 6: Reviewer Checklist

WEF Webcast Review Form



Webcast Title: Click or tap here to enter text.

Committee: Choose an item. **Webcast Date:** Click or tap to enter a date.

Reviewer Name: Click or tap here to enter text.

Technical

Does the presentation help meet the goals of the webcast as outlined in the title and description? (<http://www.wef.org/webcasts/>) Yes No

Do the different presenter’s slides work well together as a cohesive group (i.e. good flow, no contradictions)? Yes No

Is the information presented accurate? Yes No

Where table and graphs are used: are they easy to read and do they make sense and add to the goal of the presentation? Yes No

If you answered “no” anywhere above, please explain.

Visual/Grammatical:

Without reading the slides – do the slides contain an appropriate amount of material (e.g., readable without too much information)? Yes
 No

Have images been properly referenced to the source? Yes
 No

Are slides diverse and visually appealing? There should be a graphic, table, or image at least once every three slides. Yes
 No

Are acronyms defined on first use? Yes
 No

If you answered “no” anywhere above, please explain.
 Click or tap here to enter text.

Please include any additional comments here:

Click or tap here to enter text.

Appendix 7: Practice Call Checklist

Set Everyone Up

- ✓ Make sure everyone gets on okay.
- ✓ If they are not called in on the phone, remind them that's best practice.
- ✓ Be sure they enter their pin

Introduce the Tool

- ✓ Explain how the webcast will go (control passing, intros, etc.)
- ✓ Practice passing controls once

Verify the Agenda

- ✓ Make sure there have been no changes to the speaking order
- ✓ Be sure everyone knows how long they have to speak
- ✓ Ensure a decision has been made about whether Q&A will be between speakers, or only at the end

Reminder the Speakers to

- ✓ Put their final slides into dropbox by EOD the Thursday before the webcast
- ✓ Get their copyright info to you (if they haven't already)
- ✓ Get their bios to the moderator (if they haven't already)
- ✓ Once you send them the notification that the final slides have been uploaded, download deck to desktop (extremely important on sponsored webcasts)
- ✓ Call in 30-45 minutes before the webcast

Practice

- ✓ See how the group wants to proceed – everyone is different. They may want to run through their slides at a high level, or in more detail. However they choose to proceed, make sure they are somehow peer reviewing each other's slides.

Appendix 8: Sample PDH Instructions

Addressing OSHA Confined Spaces in Construction: Rules You Need to Know

Tuesday, November 15, 2016

1:00 – 3:00 pm Eastern



Continuing Education Credit Distribution

This system eliminates the need for participants to submit additional files to WEF by fax, mail or email. Utilizing this system will ensure that WEF has the necessary documentation for attendance audits by various licensing agencies, and will enable WEF to maintain status as a continuing education provider.

Attendees interested in continuing education credits should click this [link](#), complete and submit the online evaluation form in order to receive a certificate of attendance.

- Once you have successfully completed the online **evaluation form** and clicked the submit button, you will automatically receive an email containing a link to a PDH certificate.
- Attendees will be responsible for entering their name and number of credits earned into this document before printing.
- **PDH Credits** are issued at **1.0** credit for every **session hour** and should be assigned correctly on each certificate.
- Many states will require a **site monitor's signature** as confirmation of attendance. If you do not have a site monitor, you may have your HR representative or supervisor sign this certificate.

Please note: Many states differ in the types and/or numbers of credits they will approve for educational events. ***Participants are responsible for exploring their state requirements and for ensuring that WEF credits are accepted by their state licensing agency.***

WEF continues to work toward improving our Continuing Education Program. Our goal is to meet your needs while simplifying the process for all of our participants. We welcome any suggestions you may have for improving the webcast follow-up system. Please contact webcasts@wef.org with any questions or comments regarding this webcast.

Appendix 9: Sample Webcast Slides

(include PDF attachment)

