



Webcast Guidance Document

Originally 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 goal. 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 provide 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.

This document was originally developed in 2016-2017 by the CLC Guidance Document Taskforce. It has since been updated by WEF staff to align with current practices, platforms, and technologies. The original members of the taskforce were:

Jim Hewitt, Guidance Taskforce Lead

Kyle Logue, Guidance Taskforce Co-Lead

Mattie Engels, Webcast Guidance Lead

John Copp, Representative from the Municipal Resource Recovery Design Committee

Aditya Ramamurthy, Representative from the Utility Management Committee

Adam Rogensues, Representative from the Plant Operations and Maintenance Committee

Heidi Tierney, WEF Staff

Keith McCormack, Committee Leadership Council Vice Chair

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
Create the LMS product and registration, create wef.org event page	Webcast 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; create shared folder; 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	Webcast staff
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	Webcast staff
Post webcast reminders for WEF Communities	Webcast staff
Answer prospective attendee questions	Webcast staff and customer service staff
Ensure sponsor logo (if applicable) is on all slides	Webcast staff
Upload slide handouts to website	Webcast staff

Task	Who's Responsible
Send panelist invites and reminders to speakers	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, 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 at least one date, with some committees receiving two or three depending on demand, size, and other factors. 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

Several times throughout the year WEF partners with other organizations to produce webcasts or other virtual events.

There are multiple Sponsor eShowcase webcasts per year that are utilized by companies to showcase their product(s). These are produced by the Sales and Buyer's Guide teams separately from the webcast program.

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 or lightly scheduled.
- 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
- 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 around WEFTEC 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 Thursday
Final Slide Deadline	2 days before
Practice Webcast	1 week before the webcast
Peer Review Complete	1 week before practice webcast
Draft Slides Due	1 week prior to peer review deadline
Kick-off Call	7 weeks prior to webcast
Speaker Release Forms Due	1 week prior to kick-off call
Title, Description and List of Speakers	2.5 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.

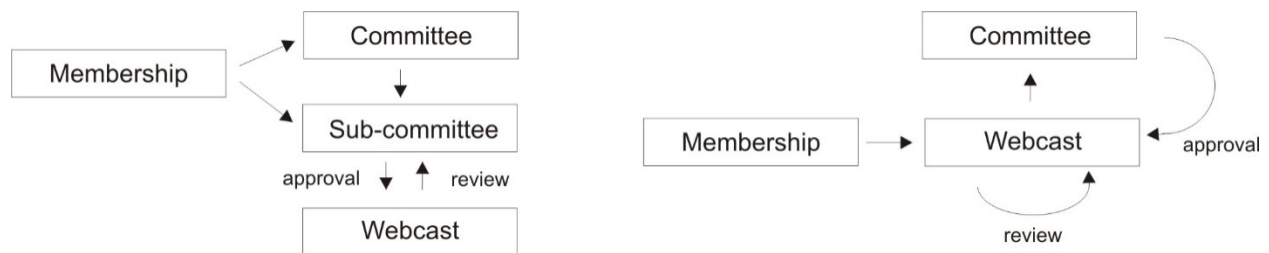


Figure 1: Schematic depiction of two different approaches taken by different committees.

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; often all Q&A will be held until the end to ensure all speakers are able to complete their presentations with sufficient time.

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 shared 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. If a formal review process is not possible due to committee commitments or other issues, slides should at least be reviewed collectively by the presentation team for feedback and adjustments. See Appendix 6 for the review checklist.

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. • Establish ground-rules for reviewing slides. • Establish suggested roles for reviewers: ○ 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
Finalization of Webcast Slides.	Presenters

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 in 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 uploading finalized content to the provided shared folder. The slides will be compiled, and presentation handouts will be uploaded to the WEF website. The compiled slides and handouts should be uploaded at least 24 hours before the webcast to provide the attendees time to review the material. This means that the speakers must submit their slides to the staff liaison two 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 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	
☐	Use the restroom before the webcast begins. Two hours can be a long time on a full bladder.
☐	Fill up your water bottle.
☐	Have a snack available.
☐	Confirm a stable internet connection. Consider having a hard-wire backup if you regularly use wireless.
☐	Setup in a quiet room, preferably a private office or a conference room.
☐	Consider using a headset or a conference call-specific land line phone to ensure quality audio.
☐	Print out a hardcopy of the presentation in case something goes wrong with your computer, you still have the slides to work off of.
☐	Have backup batteries for you mouse, if you need the mouse to navigate your slides.
☐	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 Zoom platform, and displays the slides saved on the WEF server. WEF staff will sequentially give each speaker slide 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 Zoom 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). Zoom also has a chat feature that allows speakers/moderators/and WEF staff to communicate with each other throughout the webcast as needed.

To check your system requirements for speakers (“staff”), please visit: <https://zoom.us/test>

Post Webcast Debrief

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

Webcast registrants will be able to access the webcast recording about 24 hours after the webcast has ended on the LMS platform. The webcast area on the LMS will also include everything the registrants need to obtain a PDH certificate.

Appendices

Appendix 1: Sample Deliverables Checklist

Webcast Task Organization				
Tasks:	Due:	Assigned to:	Complete:	
<i>Initial Steps:</i>			☒	
Obtain the title, description, and organizer/point-of-contact			☒	
Provide title and description to Nic in sales for possible sponsors			☒	
Create the LMS webcast product, including PDH certificate			☒	
Create the wef.org event page			☒	
Provide webcast links to marketing			☒	
<i>Webcast Development:</i>			☐	
Set up kick-off call with organizer, moderator, and speakers			☒	
Create and share the shared folder with speakers			☒	
Hold kick-off call			☐	
Compile speaker deliverables (slides, releases, bios, etc.)			☒	
Set up practice webcast session			☐	
Hold the practice session			☒	
Create final slide deck and handouts; add handouts to LMS			☐	
<i>Day of the Webcast:</i>			☐	
Create the intro script			☐	
Ensure speakers have their login links			☐	
Log on early with speakers for final check-in			☐	
<i>After the Webcast:</i>			☐	
Download the webcast recording and upload to Vimeo			☐	
Add vimeo link to LMS			☐	
Follow up with and thank presentation team			☐	

Speaker Checklist:									
Speaker Name:	Speaker Email:	Speaker Release Form:	Bio:	Picture:	Powerpoint:	Approved Dry Run Date:	Dry Run Date:	Powerpoint Final:	Initials:
Aren Williams (DCWillia@vbgov.com)		☒	☒	☒	☒	☐		☐	
Annis Piven (dpiven@aegion.com)		☐	☒	☒	☒	☐		☐	
		☒	☒	☒	☒	☐		☐	
Gordon Baldwin (gbaldwin@heitkamp.com)									
Ed DeBoda (Ted.Deboda@NASSCO.org)		☐	☒	☒	☐	☐		☐	
Will Markey (wmarkey@eheitkamp.com)		☒	☐	☒	☒	☐		☐	
		☐	☐	☐	☐	☐		☐	
		☐	☐	☐	☐	☐		☐	
		☐	☐	☐	☐	☐		☐	

Appendix 2: Webcast Proposal Form

WEF Community Webcast Program Proposal Form

Webcast organizer(s) should complete this form and submit it to WEF webcast staff (Kabrea Tyler, ktyler@wef.org) ten (10) weeks in advance of the scheduled webcast date.

Proposing Community:

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 ☐

Primary Topic Focus Area:

Possible Audiences Interested in This Topic:

Other Comments or Information:

Webcast Organizer:

Name:

Title:

Organization:

Phone:

Email:

Proposed Webcast Moderator (if not organizer):

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:

4. Name:

Title:

Organization:

Phone:

Email:

5. Name:

Title:

Organization:

Phone:

Email:

Additional speakers:

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



WEBCAST AGREEMENT (Webcast Administered by WEF)

Webcast Title:
Live Event Date:
Speaker(s):
Employer(s):

Whereas the above-identified Speaker(s) and their respective Employer(s) (collectively, the webinar “Presenters”) desire the opportunity to present and appear in a webcast produced or sponsored by Water Environment Federation® (“WEF”), the Presenters and WEF agree as follows:

1. Rights granted.

a. The Work. The “Work” shall constitute the audiovisual presentation that is referenced above (“Webcast Title”), which the parties contemplate will be filmed, webcasted, broadcasted, produced, recorded, sponsored, distributed, or otherwise supported by WEF or its representatives. The parties agree that WEF shall own copyright in the Work; to the extent WEF’s ownership does not arise by operation of law, Presenters hereby assign copyright ownership of the Work to WEF. At Presenters’ request, WEF may consider granting (by separate agreement or addendum) Presenters a limited license to use the Work for a particular time and particular purpose, but no such license is granted by this Agreement.

b. Written Materials. With respect to any written materials such as powerpoint slides, charts, graphics, photographs, text, etc. (collectively, “Written Materials”) which Presenters cause to appear (or otherwise utilize) in the course of the webcast, **this Agreement does not grant or transfer ownership of the Written Materials. Any Written Materials owned by Presenters shall remain owned by Presenters.** Presenters grant to WEF an irrevocable, royalty-free, non-exclusive, worldwide, perpetual license to use the Written Materials in connection with the Work, including without limitation reproduction, publication, public distribution, public display, public performance and (to the extent necessary to utilize the Work) creation of derivative works or adaptations.

c. Consent to use image and voice. Presenters further consent to the use of their respective names, images, photographs, voices, and video recording in the Work and WEF’s exercise of its rights in connection with the Work.

2. Representations and Warranties. Presenters represent and warrant that Presenters have full right and authority to grant to WEF all rights granted in this Agreement, including without limitation the copyright assignment and licenses set forth in section 1. Presenters further represent that Presenters have not granted any conflicting rights, and that the rights, representations, and warranties herein do not breach any contracts between Presenter(s) and third parties. Presenters further represent and warrant that the Written Materials and the Work do not infringe any copyright or any other right of any person or entity, and that to the best of Presenters’ knowledge, the Work and Written Materials contain no defamatory or other unlawful content.

It is the responsibility of the Presenters and not WEF to determine whether the prior consent of any third party is necessary for the granting of any rights set forth in this Agreement.

WEF makes no representations or warranties regarding the use of the Work by WEF’s customers, members, or others who may view the Work.

3. Indemnification. Presenters agree to indemnify, hold harmless, and defend WEF (and its members, partners, assigns, and successors in interest) from and against any claim, demand, or action arising from the exercise of rights granted in this Agreement, WEF’s publication, distribution, reproduction, or broadcast of the Work, or the breach of any of the representations and warranties herein.

4. Term. This Agreement shall be in force for the longer of ten years or the term of U.S. copyright in the Work. The Representations and Warranties, Indemnification, Disputes, Other Terms, and Special Provisions shall survive termination of the Agreement.

5. Disputes. This Agreement shall be governed by and construed under the law of the state of Virginia, the Eastern District of Virginia, and the United States. Any dispute regarding this Agreement or the rights hereunder (including without limitation copyright) shall be resolved by binding arbitration, by an arbitrator or panel mutually agreed upon by the parties, to take place in or within twenty miles of Alexandria, Virginia.

6. Other terms. If any provision, or portion of any provision, of this Agreement is determined to be illegal, invalid, or unenforceable, such provision or portion shall be severed and shall be inoperative, and the Agreement shall be construed without the particular illegal, invalid, or unenforceable provision or portion. The remainder of the Agreement shall remain operative and binding on the parties.

7. Special Provision for U.S. Government Employees and U.S. Government Works. If any Written Materials were created by employees of the United States government acting within official duties, and therefore deemed a government work not subject to U.S. copyright protection, then (i) section 1 shall not apply as to those Written Materials (identified in the "Government Employees Only" section below as Government Written Materials), and (ii) the indemnification of section 3 is limited to \$5 million. The remainder of the Agreement will remain in force. Presenters shall certify the belief as to government works.

For Presenters:

*Signature (Speaker)

*Date

*Name and Title of Authorized Employer Representative
(only if required by employer's rules)

*Date

*Signature of Authorized Employer Representative

GOVERNMENT EMPLOYEES ONLY

(Only complete this portion of the agreement if the webcast included use of materials that were created by an employee of the U.S. Government acting within the scope of official duties. If your work was performed under a government contract but not by a government employee and/or if any of the co-authors are not government employees, do not complete this section.)

Presenters certify that the Government Written Materials specifically identified below were wholly created by employees of the U.S. government as part of their official U.S. government duties, and that these Government Written Materials therefore are "works of the U.S. Government" **not subject to U.S. copyright protection**. Accordingly, the Government Written Materials are available for WEF to use, and Presenters need not and do not grant WEF rights in the Government Written Materials. The remainder of the agreement shall remain in force.

Identification of Government Written Materials: _____

Authorized Signature

Name and Title of signatory

Name of Government Organization

Date

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/events/webcasts/upcoming-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.
- ✓ Troubleshoot any audio issues that may arise (using headset may be preferable; can also join via phone audio if connection is poor)

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 shared folder 48 hours 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.