

Energy Services Coalition Presentation Guidelines

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*Adapted from Rebuild Colorado & Rebuild America
Business Partners Presentation Guidelines*

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Overview:

The goal of the Energy Services Coalition and the Colorado Chapter (the "Colorado ESC") is to raise broad-based awareness of performance contracting in the public and private sectors. To this end, we regularly sponsor, facilitate, partner and participate in technical and educational seminars throughout the state to educate building owners, designers, and decision-makers about performance contracting ("PC").

The ESC believes that the role of "presenter" is an opportunity for active chapter members and their companies to benefit from their involvement without compromising our national and local charter with respect to avoiding the use of the ESC as a medium to market individual companies' products or services.

ESC Standing Committee for Speaker Engagements, Meetings, Conferences and Seminars

The Committee shall be composed of five (5) members in good standing with the Local Chapter. In addition to one member from the Chapter Leadership Team, four (4) at large members will comprise the Committee. The preferred balance for at-large members is to have one member from each of the following –

- Public Sector
- Energy Services Company
- Financial Services Provider
- Engineering or Support Consultant

Typically, the ESC presentation Committee will identify the theme for each seminar, the target audience and the general subject matter. Every effort will be made to secure a timeframe of an hour or more so that several ESC members can participate in a panel. The Committee will then issue an e-mail invitation to local Chapter membership at-large to participate in the seminar as a presenter. Speakers will be current and active ESC Colorado Chapter members. Other speakers may be invited/solicited, such as representatives from performance contracting projects of government or private facilities or other non-member industry professionals that the committee or Chapter believes would be appropriate to involve. Speakers on a typical panel would include an OEMC representative, one or more ESCOs, a financing company, and a non-member end-user.

The Committee will base their selection of speakers on the following general guidelines –

- Active participation in local Chapter (meeting attendance, committee participation, etc.).
- Prior demonstrated presentation expertise.
- Ability to team with other ESC members.
- Communication skills.
- Content expertise.

A protocol will be followed for selecting speakers and ensuring fairness. Rationale for selecting speakers include:

- Statement of interest in speaking at the event (responding to an e-mail message within 3 days)
- Recent meeting attendance and level of involvement (committee activity)
- ESCO rotation list (separating major ESCOs from smaller ESCOs)
- Did not speak at the last event (this is waived if other speakers do not volunteer or do not meet criteria)

Once speakers are selected the committee will then provide a support role for agenda development, coordination of the event and review of presentation material to ensure that it is generic (non-company specific) in nature and is on-target with the seminar topic.

The desired panel for a 1-hour or more presentation includes:

- At least 2 ESCOs
- At least one ESCO that addresses small customers (\$50,000 to \$100,000 capital projects) where such customers are likely to be represented in the audience (any schools/cities/counties audience)
- One financing company, as they can give their independent endorsement of the industry and its practices and lend credibility (this presentation could be limited to 5 minutes plus Q&A in order to keep the focus on marketing pc.
- OEMC representative to present the ESC as a public/private partnership, to lend credibility to the process and a State perspective. OEMC will typically do a 5-minute overview of PC and a 1-minute overview of the ESC to establish their connection with ESCOs. Note that the panel or committee may elect to have someone else present this material if an OEMC representative is unavailable.
- An end user of performance contracting.

Where a smaller amount of time is available, one to two speakers need to represent the ESC or its mission to educate about performance contracting. This may be 2 ESCOs (shared 20-minute overview), OEMC (1-minute intro/endorsement), and an end user (5-minute case study).

General Seminar & Presentation Guidelines:

1. The host or the ESC will facilitate communication between presenters prior to the event to help coordinate topics and prepare presenters. A “master of ceremonies” representing the host or the ESC will provide a smooth transition from speaker to speaker. The MC may be one of the panelists or an added participant.
2. Engage the audience. The objective of the presentations is to share information and motivate the attendees to action. If the presentation is dynamic and the information is credible, follow-up

activity is likely. There are a few “tricks” that will help a presenter to be both informative and dynamic, each of which are effective but will depend on the presenter’s personality and style. Some examples are as follows:

- a. Ask questions at random times.
 - b. Offer small prizes for participation. Some speakers offer a candy bar, a hat, or even a golf ball. This is fun and keeps the audience’s attention.
 - c. Call on members of the audience to share their opinions and thoughts. This makes the presentation seem more like a discussion and is very effective with some groups.
 - d. Have fun with the audience, using a combination of questions, gag prizes, and humor.
3. Company logos are not permitted. The only exceptions to this rule are –
 - a. On each speaker’s introductory slide, where company information is permitted to identify the speaker.
 - b. Where a government representative is speaking, the government logo is permitted.
 4. Specific product brand names are not permitted to be included in the presentations. However, it is acceptable to have photos and graphics using proprietary products, so long as they are not called out by trade name or catalogue number, and are represented as typical of the technology being discussed.
 5. Use the ESC standard template for slideshows.
 6. Slides are meant to be place-holders, visual aids, and memory joggers for the presenter.
 - a. Please keep the text short and use lots of graphics.
 - b. Do not read your slides to the audience. Use the slides to illustrate the points being made, with the presenter providing the “meat” of the presentation.
 7. A good rule of thumb is 1 slide should take 1-3 minutes to discuss. Therefore a 30 minute presentation will typically have 15 slides.
 8. All presentation material will be consolidated into a master presentation for hand-outs at the meeting, shared amongst presenters and posted on the ESC and Rebuild Colorado websites.
 9. Additional handout material will preferably be limited to ESC publications and materials from Government agencies or other third party organizations and should not be oriented toward any particular company’s products or services.
 10. OEMC will send post-seminar follow-up information to the attendees.
 11. Use of generic case studies that are relevant to the seminar topic is desirable. Ideally, these case studies will also be posted on the OEMC website.
 12. Evaluation forms should be provided to all attendees and should include areas to rate and comment on the content, the presenters and any suggestions or requests for future information.