

# Pre-WEFTEC Guidance Document

## Facilitators and Assistant Facilitators



Thank you for choosing to participate as a facilitator or assistant facilitator for WEFTEC 2023. Highly engaged facilitators are the secret ingredient for successful sessions. Facilitators and Assistant Facilitators will be participating in the **interactive** technical sessions taking place during the conference.

**Please read through the included materials carefully and completely. This document only address facilitator duties prior to WEFTEC. An additional document containing details on the WEFTEC onsite experience will be available to you as WEFTEC draws closer.**

### WEFTEC FACILITATOR TIMELINE

The timeline provided below can be used as a quick reference checklist for key deadlines. Keep this for your records.

MAY	
Notice of Acceptance	May 8
Speaker Portal Orientation	May 17
Confirmation of Participation	May 22
JULY	
Moderator & Facilitator Info Session	July 10
AUGUST	
Introduction, Photo, and Resume/CV Due	August 9
SEPTEMBER	
Interactive Session Training	September 6
Pre-WEFTEC Briefing 101	September 18
Pre-WEFTEC Briefing	September 19
Draft Presentation Due	September 25
<b>WEFTEC 2023</b>	<b>Sept 30 – Oct 4</b>

### STAFF CONTACT INFORMATION

If you need assistance from the WEF staff, do not hesitate to contact us.

**General Questions** by email to: [speakers@wef.org](mailto:speakers@wef.org)

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# GETTING STARTED

## NOTICE OF WITHDRAWAL

If at any time while looking over this document you realize you cannot fully commit your time to being an effective facilitator, please reach out to WEF staff at [speakers@wef.org](mailto:speakers@wef.org) letting us know you need a replacement.

## CONFIRMATION OF PARTICIPATION

The first thing you will be asked to do after logging into the speaker portal is to confirm your participation in WEFTEC.

You will be asked to confirm every role that has been assigned to you. For example, if you are speaking in one session and moderating another you will be asked to confirm both. This applies to those speaking in multiple sessions as well.

**Confirmation of Participation is due by May 22<sup>nd</sup> at 9:00AM Eastern in the speaker portal.**

You will need to indicate whether or not you will serve as a facilitator in-person at WEFTEC 2023.

There are no remote or virtual presentation options.

**If you do not confirm by May 22<sup>nd</sup>, we will assume you do not intend to participate in the session and you will be **withdrawn** from the program.**

## THE SPEAKER PORTAL

<https://ww3.aievolution.com/wef2301/>

All of the deadlines must be completed in the Speaker Portal. By now you should have received a notification providing you with your speaker portal log in information.

### Logging into the Speaker Portal

**WEF Members** are required to use the WEF Member Login option.

**Non-WEF Members** have been provided login credentials.

All of you have already been inputted into the system. Under no circumstances should you create a new profile. Creating a new profile could cause issues such as removing you from your presentation or session.

If you have not received an email with login instructions, contact [speakers@wef.org](mailto:speakers@wef.org) immediately.

## SPEAKER PORTAL ORIENTATION

We acknowledge some may experience challenges while trying to access information in the speaker portal. To help guide you, WEF Staff will be holding a speaker portal orientation where we will show you how to find information such as:

- 1 Facilitator, Moderator, and Speaker **Contact Info**
- 2 Session **Agenda**
- 3 Session **Description**
- 4 Session **Date, Time, and Room Location**
- 5 Session **Activity or Interactive Component**

Orientation will be held via zoom on **Wednesday, May 17<sup>th</sup>** from **1:00 – 2:00 PM Eastern**. Please make sure to register and reserve the time on your calendar.

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## MODERATOR & FACILITATOR INFO SESSION

Moderators and Facilitators have several responsibilities to complete before we arrive on-site at WEFTEC. We highly encourage attending this info session where we will provide information on how to prepare for your technical session.



Training will be held via zoom on **Monday, July 10<sup>th</sup>** from **2:00 – 3:00 PM Eastern Time**. Please make sure to register and reserve the time on your calendar.

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## WEFTEC REGISTRATION

All presenters (speakers, authors, moderators, facilitators) are responsible for their own registration, travel, and lodging fees. **All presenters & facilitators must register for WEFTEC and pay the appropriate fees.**

WEF members receive the best registration rates, so make sure you are an active WEF member to take advantage of the benefits.

The best way to register and reserve your hotel is online at [www.weftec.org/registration](http://www.weftec.org/registration).



# INTERACTIVE SESSIONS

## FREQUENTLY ASKED QUESTIONS

### What is the difference between facilitators and moderators?

WEFTEC Moderators are assigned to traditional technical sessions which have minimal engagement with the session participants. As a facilitator, you have been assigned to an interactive technical session. In addition to moderator duties such as coordinating with speakers, review presentation slides, and maintaining the agenda during the session, facilitators have the additional responsibility of maintaining **audience engagement**.

Facilitators must ensure:

1. The session engagement activity is communicated properly to speakers prior to the session and attendees during the session.
2. Engagement activity is carried out according to the agenda provided during the technical session.
3. Creating a safe environment where all session attendees are comfortable participating in the engagement activity.

### What makes a session interactive?

A technical session becomes interactive when the session agenda includes at least one of various **attendee engagement activities**. Some examples include but are not limited to:

- |  |  |
|--|--|
|  Facilitated Discussion      |  Panel Discussion |
|  Case Study Analysis         |  Trivia           |
|  Conversation & Input        |  Debate           |
|  Knowledge Development Forum |  |

### How do I find out what my engagement activity is?

In the speaker portal, your session's engagement activity is listed in the (1) **session description**, (2) **session agenda**, and (3) **session guide**.

## INTERACTIVE SESSION TRAINING

For the facilitators and speakers taking on the challenge of having interactive sessions, this training will prepare you for what to expect during your session at WEFTEC. During this training, WEF Staff will go over each interactive format, best practices on how to implement the activities in each format, and how to prepare for different challenges you may run into while working with attendees.



Training will be held via zoom on **Wednesday, September 6<sup>th</sup>** from **2:00 – 3:00 PM Eastern Time**. Please make sure to register and reserve the time on your calendar.

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# ENGAGEMENT ACTIVITY DESCRIPTIONS

## Case Study Analysis

During case study analysis, the participants will review the details of events presented during the speaker presentations and follow a step-by-step process to identify the problem and find its solution. Participants can move around to form groups where they will review the presented cases. In their groups, they will use discussion to increase awareness of the problems and share their own experiences to find the solution.

### Facilitator Responsibilities:

- Provide stimulating questions relevant to presentation to move conversation forward.
- Encourage attendee participation and speaker involvement in group discussion.

### QUICK TIP

In 2022, one of our case study facilitators prepared **handouts** for the attendees with the information for each of the case studies presented. Contact WEF Staff for assistance in preparing and providing session the handouts.

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### Speaker Presentations

10 to 15 minutes

Each speaker will present their case study within the given time period. Presentations will be followed up by a group analysis from the session participants.

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### Group Analysis

5 to 10 minutes

Participants will form small groups with those seated around them and will discuss the presented case study. Discussions should include summarizing the case study, identifying problem areas, providing solutions, and report-outs to facilitator.

#### Questions to include:

- What actions were taken in the case?
- Were these actions the most appropriate and why?
- Were there any consequences of the actions taken?
- Was anything omitted or not considered?
- Is there anything you would have done differently?

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## Conversations and Input

During conversation and input sessions, the speaker will have an opportunity to engage directly with the attendees. After each presentation, speakers will propose a question to the attendees who will then openly discuss the answer to the question while sharing knowledge and information.

### Facilitator Responsibilities:

- Confirm speakers have prepared their post-presentation questions for the attendees.
- Guide attendee conversation. Remain focused on presentation topic.

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### Speaker Presentations

15 to 20 minutes

Each speaker will give their presentation. Speakers must remember to leave time to present the audience with their questions for the conversation and input segment.

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### Conversations and Input

5 to 10 minutes

After being presented with the speaker's questions, the session participants will discuss the answer amongst themselves as the facilitator provides thought-provoking comments to encourage conversation.

## Facilitated Discussion

In facilitated discussion sessions, attendees will be encouraged to have open conversation with the speaker(s) and other attendees after each presentation.

### QUICK TIP

Facilitators should come prepared with questions or thought-provoking comments to help spark conversation if participants are not actively participating in discussion. Facilitated Discussion should **not** be a Q&A period. **Work with your speakers to develop best conversation starters.**

### Facilitator Responsibilities:

- Provide stimulating questions relevant to presentation to move conversation forward.
- Encourage attendee participation and speaker involvement in group discussion.
- Recognize when there is need to cut conversation or opportunity to dive deeper.

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#### Speaker Presentations 15 - 20 minutes

Speakers will have a max of 15 minutes to give their presentation. Each speaker presentation will be followed up by a period of facilitated discussion.

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#### Discussion 10 to 15 minutes

The conversations should be between the session participants, the facilitator, and the speakers. There is an opportunity here for participants to share their knowledge with the speaker and for speakers to ask questions.

## Knowledge Development Forum (KDF)

Knowledge Development Forums allow the attendees to exchange information and collaborate with one another to gain and share new knowledge. The conversation will be pushed forward by instigators (additional facilitators) mixed in with the audience members.

**\*Facilitator responsibilities will vary depending on the session agenda and discussion topic. Meet with your session (speakers and co-facilitators) to determine how to proceed.**

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#### Speaker Presentations 5 to 10 minutes

Short speaker presentations with condensed information on each slide is highly encouraged. During KDF's – it is possible for discussion to interrupt the speaker and begin early.

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#### Discussion 15 to 20 minutes

The goal of the instigators will be to fuel conversation and create an environment where knowledge is constantly being shared from different perspectives. When participants are constantly participating without prompt, instigators can take a step back.



## Panel Discussion

Panels are an opportunity for the attendees to have an open discussion with the panelists. The goal of the panel format is recognizing audience members have valuable information to offer as well and allowing them to get involved in the session.

### Facilitator Responsibilities:

- Provide stimulating questions relevant to presentation(s) to move conversation forward.
- Encourage attendee participation and speaker involvement in group discussion.

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#### Speaker Presentations 5 to 10 minutes

Speakers need to prepare short, ted-talk style presentations and prepare for majority of the session to consist of the sharing information with the audience via conversation.

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#### Discussion 30 minutes minimum

The majority of the session time will be spent on open discussion between the panelists and audience. During discussion attendees will be encouraged to not just ask questions, but to offer their own knowledge, perspectives, and converse with the panelists.

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## Trivia

Sessions including trivia are the perfect opportunity to quiz the attendees. Trivia sessions consist of short presentations and the majority of the time will be spent using polling software to present questions to the attendees.

### QUICK TIP

During the summer, inform the speakers of session setup and develop the polling questions alongside them.

To ensure the session runs smoothly, facilitators are highly encouraged to work closely with WEF Staff when setting up polling for the session. Staff can also assist in preparing prizes for trivia winners.

### Facilitator Responsibilities:

- Work closely with speakers to prepare polling questions relevant to the information they will share during their presentations.
- Input questions into polling software before the session and manage the polling software during the session.
- Prep for session by letting attendees know how to participate in the polling and encourage their participation.

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#### Speaker Presentations Varies

Presentation time lengths must follow the agenda closely. Each speaker may have a different speaking time length. Speakers should develop short presentations that introduce attendees to their topic and prepare them for the upcoming trivia moment.

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#### Trivia Varies

Based on the provided agenda, the length of each trivia moment will depend on the speaker's topic and the number of polling questions that will be shared with the audience.

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# FACILITATOR TO-DO LIST

After your Info Session, it is time to begin preparing for your session!

## CONTACTING SESSION PARTICIPANTS

Starting with their acceptance into the program and leading up to WEFTEC, speakers have many responsibilities to fulfill. As a facilitator, familiarizing yourself with your speaker's timeline will be beneficial. **Be sure to keep up with this timeline and contact your speakers when necessary.**

SPEAKER DEADLINES	
Notice of Acceptance	<b>May 8</b>
Confirmation of Participation	<b>May 22</b>
Author and Speaker Info Session	<b>June 1</b>
Full Paper Due	<b>July 12</b>
License Agreement e-Signature Due	<b>August 1</b>
Introduction, Photo, Resume/CV Due	<b>August 9</b>
Draft of Presentation Due	<b>Sept 25</b>

**Download** the **Author and Speaker Guidance Document** available within the speaker portal for more detailed information on speaker deadlines.

All contact information for your **speakers** and **co-facilitators** is available to you in the speaker portal. To find their contact information, follow the steps provided below:

**Step 1:** Log into <https://ww3.aievolution.com/wef2301/>

**Step 2:** Click the Speaker Portal option available on the Dashboard

**Step 3:** Scroll down to find your session block

**Step 4:** Click on your session title

**Step 5:** Once the session details and agenda open up, click on each speaker or facilitator name to access their contact information.

Use these instructions to introduce yourself to your speakers and co-facilitators.

## SCHEDULING SESSION PREP CALLS

Time to discuss your session with all of your speakers and facilitators. Prepare for your session by scheduling a zoom, teams, etc. call where you can go over the session agenda, discuss how the session will run, and predetermine what presentation slides should cover to avoid overlap.

**Contact WEF Staff if you would like assistance with scheduling and setting up session calls.**



## DRAFT PRESENTATION UPLOAD

All speakers are required to upload a draft of the PowerPoint presentation to the speaker portal by September 25<sup>th</sup>. As moderators your responsibility will be to log into the speaker portal and review each speaker's presentation. For the session to flow as smoothly as possible, please ensure the following:

1. **There is minimal overlap between each of the speakers' slides.**
2. **The number of slides is consistent with presentation time length.**  
Example: There should not be 50 slides for a 10-minute presentation.
3. **Company/organization logos should only be on the first and last slides.**

So that WEF may continue to offer Continuing Education credits for the Technical Program, it is our policy that logos should not be used in presentations at WEF Conferences. If it is your employer's policy to use the logo in presentations, placement may be on the first and last slide only. This means **no logos** may be used on any slides other than the first and last slide!

- Slides are not too crowded/busy.
- Text should be large enough for people in the back of the room to see.
- Images should not be blurry or grainy.
- Colors on the slide should consider those in the audience who may be visually impaired. Light text should be used for dark backgrounds and darker text for light backgrounds.

## PRE-WEFTEC BRIEFING

Pre-WEFTEC Briefings provide you with a step-by-step of what to do when you arrive onsite in Chicago. For example, speakers will receive information on how to check-in and upload their final presentations while moderators will learn where to pick up the materials needed for their session such as speaker bios.

**Attendance to at least one of the speaker briefings is mandatory. Use the provided links to register for one of the two options.**

There will be no onsite briefings. If you would like to meet with your fellow session participants before your session, please visit the Speaker Prep Room where we will have tables available to you.

### Pre-WEFTEC Briefing 101

September 18 | 2:00 – 3:00 PM Eastern

For those who have three years or less of experience participating in a WEFTEC session

[REGISTER](#)

### Pre-WEFTEC Briefing

September 19 | 2:00 – 3:00 PM Eastern

For those who have participated in a WEFTEC session many times before and will need quick updates.

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