American Water Works Association
Pacific Northwest Section

Webinar Training Guide with Approved Pricing Policy

Introduction & Purpose

Part of the mission of the PNWS-AWWA is to promote education among water professionals. Traditionally, this has taken the form of classroom training, hands-on workshops, and technical sessions at short schools and the annual conference. With the advent of the Covid-19 pandemic, social distancing measures intended to prevent the spread of the infection have resulted in the cancellation of training in our traditional settings. Online training via conferencing applications has emerged as a leading alternative setting. Normally, Washington State does not grant CEUs for such training; however, in April 2020, Washington temporarily relaxed its policy, and currently will approve such training, subject to the addition of a few conditions to verify webinar attendance. Idaho and Oregon policies are generally less stringent than Washington's; if a practice satisfies Washington, it will usually satisfy Idaho and Oregon as well.

The purpose of this document is to provide a resource for the PNWS committees and subsections wishing to provide webinar training, and to set a common section-wide practice for preparing and delivering webinar training that qualifies for CEUs. This will allow committees and subsections to focus on developing content, rather than on duplicating processes. Many short schools and subsections do not cross or draw attendees over state lines, and may not be familiar with how to obtain CEU approval from or report CEUs back to other states. Since webinars can draw from all 3 states in the section, class sponsors will need to apply for CEUs in all 3 states.

This document will also set out some general policies, such as pricing, marketing, preferred technologies and platforms, and post-training reporting. It is our intention to also develop a list of volunteers who can provide advice, either with regard to the technology, or to working with the three state agencies to obtain CEU credit for the training.

Process - CEU's

Class / Content Structure for CEU Approval
- In Washington, minimum 3 hours instruction time. Content can be delivered in three separate one-hour increments, participant must be there for every session to receive credit. No partial credit will be granted.
- Introductions, breaks, general socializing cannot be included in the instruction time.
- See CEU application information on Program Committee page for more specific information on what each state considers to be relevant training specific to operation, maintenance and management of water systems and water quality. https://sites.google.com/a/pnws-awwa.org/program-committee/home/meeting-minutes

Applying for CEUs
- Normal procedures, visit Program Committee website for how-to information, at
  https://sites.google.com/a/pnws-awwa.org/program-committee/
    - Need to apply for all 3 states
    - Lead time needed
        - Washington minimum is 15 days for classroom format, 45 days for conference or short school format
        - Oregon – must be approved by board that meets monthly. Oregon charges fees for review, which must be paid before they will schedule review. Fees are listed on the OESAC website.
        - Idaho – may need to be approved by board that meets monthly
    - Location – webinar
    - If using previously approved classroom training, including the Spokane conference program, include approval reference numbers for all 3 states in the application, to speed re-approval process.

- Webinar special requirements per Washington temporary guidance
    - Poll each participant once/hour. Question, time stamp asked and time stamp answered.
    - If given in 1-hour increments, verify all were attended in full by each participant
    - What platform or software was used? (Zoom, Teams, GoToMeeting, etc.)
    - When submitting rosters to state, provide above info along with attendance roster. **Attendance rosters must be submitted within 30 days** of completion of training.
        - Approval letters from each state should also tell you how to submit documentation. Information is available from their websites.

- Furnish attendance certificates to each participant. Provide one for each state, including training course name, date, location, that state's reference approval number, CEUs granted, participant's name, organization sponsoring training, must be signed by an officer of that organization.

    https://ibol.idaho.gov/IBOL/BoardAdditional.aspx?Bureau=WWP&BureauLinkID=131

    http://www.oesac.org/

    http://www.instruction.greenriver.edu/wacertservices/tcs/default.shtm

CEU Records Retention

- CEU applications & approvals
    - Abstracts
    - Speaker bios/qualifications
    - Schedule
    - Application forms and cover letters
    - CEU approval letters
    - Attendance rosters and submittals to states
    - Attendance certificates to participants

Typically, these records are maintained by the sponsoring subsection or committee. In the event a session is hosted jointly, the co-sponsors will need to determine which group is applying for the CEUs and maintaining the records.

Webinar Platform and Technical Requirements

 The PNWS has a Zoom account that will accommodate up to 100 participants for a webinar.

The section will support trainings and meetings with Zoom only. It is not practical for the Section to carry multiple platforms for virtual meetings and training. Zoom was chosen for the following reasons and features:

- Provides a single communications suite for meetings, chat and other features
- Provides a stable medium for small and large (up to 100 participants) virtual meetings
- Operates in low bandwidth environments
- Easy to set up and use
- Can use desktop, conference rooms and mobile devices
- Low cost to Section

Zoom also has the following features that support CEU requirements and other conveniences:

- Play video with audio
- Virtual backgrounds
- Polling features, important for CEU requirements
- Chat and non-verbal feedback
- Personal meeting ID's – Break out meetings
- Recording with transcripts

If a committee or subsection chooses to use another platform, the Section will not support or aid in technical assistance for non-Zoom platforms. Other platforms may be used, provided they have comparable features. The sponsoring committee / agency / host must support the platform and be able to provide technical support during the webinar.

- Platform Requirements
    - Presenting
    - Polling
    - Moderating
    - Restricting attendance, preventing outsiders from hijacking meeting

- Provide log-in info to participants
- Identify the equipment participants will need
    - High speed internet
    - Wired connection or robust wi-fi
    - Accessible email
    - Participant's instructions for platform used
        - Logging in
        - Controls
        - Chat windows

- ▪ Muting/unmute
  - o Web camera & mic (Bandwidth could be an issue if everyone's camera and mic are turned on. The larger the group, the larger the issue.)
  - o Desktop, PC, Tablet
  - o Headset recommended
- Multiple moderators recommended – one to manage presentations, one to manage polling and documentation. Needs to be someone experienced in using software. Zoom has on-line tutorials.

- What back-end work is needed ahead of time?
  - o Access to PNWS Zoom account. Contact the Section's Executive Director to schedule and for further details.
  - o Technical rehearsal / testing with all presenters to ensure everything works
  - o Identify responsibilities during class
    - ▪ Moderating
    - ▪ Documenting
    - ▪ Tech support
    - ▪ Follow AWWA practice by starting 10-15 minutes early and displaying a placeholder welcome on the screen. This allows participants to log in and resolve any technical issues on their end, before the training begins.

Fees for Training

Fees for virtual training will be $40 per hour, with a 50% discount for AWWA members.

- 1 hour $20 member / $40 non-member
- 2 hours $40 member / $80 non-member
- 3 hours $60 member / $120 non-member
- 4 hours $80 member / $160 non-member
- 6 hours $120 member / $240 non-member

Fees to be collected either by credit card during registration process, or by check, and must be paid before the webinar. In Constant Contact it must be communicated where the checks should be sent (made out to PNWS-AWWA). They need to go to a coordinator of the webinar so they can verify that attendees did indeed pay. For this reason, it is highly recommended that webinar login information is not shared until just prior to the session, following verification that payment has been received.

Substitutions will not be allowed, due to complications associated with tracking attendance for CEU credit.

Refunds will be made only in the event the webinar cannot be completed due to problems on the PNWS end. We should attempt to re-schedule the webinar first.

Participants should be encouraged to check their spam folders for confirmation of registration, and again on the morning of the webinar for email containing log-in information, since mail sent via Constant Contact is often diverted directly to spam folders. No refund will be made due to missed notification of log-in information.

Registration

- Additional information required from operators
    - State Certifications and operator certification numbers.
    - Developing a template Google or Constant Contact form use is recommended
    - Include important info on registration site – a LOT of Constant Contact email goes directly to spam filters and junk mail folders, including confirmations with important instructions, like how to log in. Some organizations will reject ANY email from Constant Contact. Website must include a sentence about looking in spam filters and alternative methods of contacting people if confirmation and log-in information isn't received.
    - Constant Contact tutorials can be found on the Water Information Technology webpage. https://sites.google.com/a/pnws-awwa.org/water-information-technology/home/training-documents

- Initial confirmation email
    - Receipt
    - List of the equipment participants will need
        - High speed internet
        - Accessible email
        - Participant's instructions for platform used
            - Controls
            - Chat windows
            - Muting/unmute
        - Web camera & mic
        - Desktop, PC, Tablet
        - Headset recommended
    - Statement of when log-in information will be sent.

The initial confirmation email should <u>not</u> contain log-in information. Since we charge a fee for this class, we want to restrict attendance to people who have paid for the class. The log-in information should be held until the evening or morning before the webinar, after the webinar coordinator has confirmed payment. This will also limit re-sharing of log-in information to others who have not paid.

- Second confirmation email
    - Instructions on how to access and log into the session (URLs, phone numbers, access codes)
    - Contact information in the event the participant cannot log in, or the session is interrupted.

Marketing

Webinars can be marketed in the same manner as classes, using the Section's normal avenues.

- Constant Contact
- Section Website
- Emails
- Other Means and Methods
    - Newsletters

- o Facebook, Twitter, other social media groups
- o Reach out to other groups, e.g. DOH, or WASWD, or WPUDA
- o List on OESAC, IBOL and WCS websites

Post-Training Reporting

- How it went
- How many attendees
- Follow-up surveys
- Lessons learned
- Quality of technology, user friendly?

Other Records Retention
- Presentations & content
  - o Posting to PNWS website
  - o Speaker / webinar release forms
- Financial records
  - o Maintained according to current practices – subsections maintain their records, Executive Director maintains committee records

Lessons Learned / Pro Tips
- For general networking & social events, like YP mini-conference track
- For CEU training
- For engineering PDH training
- Documenting attendance
- Software/technical issues
- What back-end work is needed?
  - o Access to PNWS Zoom account
  - o Technical rehearsal / testing with each presenter to ensure everything works
  - o Identify responsibilities during class
    - ▪ Moderating
    - ▪ Documenting
    - ▪ Tech support

Resources & People Available for Advice
- How to apply for CEUs and send in attendance documentation
  - o Former conference program chairs & vice-chairs
  - o Subsection officers – most subsections have conducted training
  - o Short School committees
  - o Other committees that have done training - Water Treatment, Water Quality, Research, etc.
- Technology gurus
  - o Webinar platform experts
  - o Constant Contact experts
  - o Water Information Technology Committee
- Online Training Resources page in Program Committee website
  - o https://sites.google.com/a/pnws-awwa.org/program-committee/home/online-training-information

Moderator Best Practices Guide

(This is based on experience through July 30, 2020. As we continue to learn, we'll continue to update it.)

Pre-Webinar
- In addition to normal moderator duties, conduct a rehearsal with each presenter to ensure connectivity. Be sure that you are familiar with the survey and chat functions. Presenters should try to make sure that they have a quiet space during the time that they are speaking.
- If the moderator is going to be introducing everyone, make sure that you have the bios for all speakers (alternately, you can have the speakers introduce themselves or use the intro slide option below). Presenters should be aware that opening their presentation in presenter mode (with the next slide preview open) will show up that way in the webinar.
- You may want to talk about a method for keeping speakers on time – whether that's through a private chat or texting by phone.
- Prepare survey and attendance questions
- Prepare placeholder greeting to be displayed starting 15 minutes before webinar starts. You may also want to prepare a placeholder message for the breaks between sessions (if there are any breaks)
- The evening or early morning before the webinar, send log-in information to participants and any other hints/tips.

During Webinar
- Start 15 minutes early. Display placeholder welcome, so that participants can make sure everything works on their end.
- May help to go over some basic tips for enhancing their experience; such as, some attendees noted that it was distracting to have the thumbnail picture of the presenter where others liked it (this can be changed in their preferences/settings). A few people had trouble finding the chat box or entering messages in the chat box. That type of information might also be helpful to send out in the email with the log-in code.
- Opening poll – serves multiple purposes, including starting attendance clock, collecting some survey information. Show the results of the polling for a brief time so that attendees/presenters can 'see' who is attending.
  - Collect operator name, state certified in, certification number via chat window
  - Collect engineer name, state, PE number for professional development hours via chat window
  - Get to know your audience questions, such as your profession, where you live, size of city you work in or live in, etc.
  - Recommend a slide with presenter intro & bio, rather than reading them out loud

Post-Webinar
- Prepare normal CEU attendance reports and submit to each state within 30 days of training
  - Include polling & time of response from each attendee, and information on software used for the webinar
- Prepare attendance certificates to email to attendees following verification of full attendance
- Convert recording file and upload to PNWS website