



## **CIGRE TUTORIALS**

### **Policy Document**

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Update 1 - 17 July 2018: change hyperlink p 7. Change CIGFE to CIGRE p4

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### 1 PURPOSE

The purpose of this document is to update the prior 2001 common rules and guidelines for the design, implementation and management of CIGRE tutorials, in line with the 2016/17 strategy which, inter alia, emphasizes dissemination of CIGRE's work products and improved communication.

### 2 NOMENCLATURE

Central Office	CO
National Committee	NC
Study Committee	SC
Technical Brochure	TB
Technical Council	TC
Tutorial Advisory Group	TAG
Working Group	WG

### 3 THE ORGANISATION OF TUTORIALS

This section addresses tutorials at CIGRE events, web conference tutorials or webinars, and tutorials outside CIGRE events.

Where agreed with the relevant event organisers, Tutorials are held in conjunction with CIGRE events:

- Paris Sessions;
- Study Committee (SC) and National Committee (NC) meetings;
- Regional Conferences;
- Symposia;
- National Committee events;
- Colloquia.

The decision to hold a tutorial at a CIGRE event at a physical location is made jointly by the National Committee in the host country and the SCs involved. In respect of a tutorial at the Paris Session or Symposia, the nature of the tutorial, the topics covered and the curriculum should be specified in the proposal to the Central Office as well as the time slot in the event timetable.

It is noted that a tutorial might be presented online as a web-conference or as part of one. Such an event may be regarded as not having a physical location as such. An online tutorial might be organised by or on behalf of a SC or a NC.

Information on the tutorial at any event is made available by the organiser of the event and is included in the programme of the main event in conjunction with which the tutorial is organised. Presentation material for the tutorial is provided to the event organiser free of charge by the Study Committee delivering the tutorial. Any special provisions that the event organiser chooses to put in place such as handout material, translations or reimbursement of costs to presenters are the responsibility of the event organiser.

Events at which tutorials might be presented are often so large that the running of parallel sessions is unavoidable. However, in order to maximise the opportunity for delegates at an event to attend tutorials, they should not be run in parallel with other sessions or meetings if at all possible. To be efficient, tutorials need to be well advertised in a timely manner.

It is permitted for approved, existing CIGRE tutorial material to be presented outside of CIGRE events, e.g. at events hosted by other professional societies. However, in such cases,

- a) The material should not be altered.
- b) The presenter should have been approved by the tutorial coordinator or TAG of the relevant SC, with information to and right of rejection of the SC Chair and the presenter's NC. Ideally, the presenter should be a member of the WG that prepared the tutorial and a CIGRE Member.
- c) The event at which the material is presented should have been approved by the National Committee of the host country (if it exists) and the relevant SC.
- d) Any different arrangements need to be approved by the SC Chair concerned.

Also see section 5 below for financial issues.

### 3.1 The role of Study Committees

Under the governance of the CIGRE TC, SCs are responsible for:

- proactively planning tutorials within the SC's scope, including recommendation of topics for identified target groups and systematically considering joint tutorials with other SCs;
- the design and production of the teaching material of tutorials;
- the definition of tutorial curricula;
- the appointment of lecturers/presenters;
- the monitoring of the quality of tutorials.

The TC of CIGRE will monitor the involvement of the SCs, on a regular basis.

SCs should appoint a tutorial coordinator to represent the SC in respect of its responsibilities towards tutorials. Where a SC's tutorial activity is significant, e.g. more than one event per year, it is advised to establish a Tutorial Advisory Group (TAG) in charge of tutorials, convened by the tutorial coordinator.

The tutorial coordinator or, where it has been established, the TAG is responsible for drawing up and updating the contents of tutorials, defining the curricula, selecting lecturers and organising feedback on the quality and relevance of a tutorial. For this they build on the SC's work products such as Technical Brochures (TBs) produced by WGs. However, as decided by the SC, tutorial material need not be limited to WG outputs. Cooperation between different SCs' TAGs and joint

tutorials are encouraged, especially if they include instructive case studies that apply CIGRE's state of the art practices.

Teaching in CIGRE tutorials and delivery of CIGRE tutorial material are performed by SC members, members of Working Groups commissioned by the SC or, on occasion, by non-CIGRE experts as recommended by the SC TAG.

It is the responsibility of the tutorial coordinator, to ensure that tutorials are appropriately filed in a secure system and that records of the available Tutorial Presentations are maintained.

The organising SC(s) is recommended to make all tutorial material available to CIGRE members via a suitable website.

### 3.2 The role of National Committees

By virtue of their role in the organisation of Regional Conferences, Symposia, Colloquia and National Committee events, NCs are in charge of the management of tutorials outside of those at Paris Sessions. This includes responsibility for logistics and financial management. Themes of Tutorials at Regional Conferences and Colloquia will be determined jointly by the host NC and relevant SCs.

For the Paris Session and CIGRE Symposia, this will also involve the CO. The SC TAGs and, where it is involved, the CO support the delivery of the Tutorial under the guidance of the TC.

### 3.3 The role of Working Groups

It is recommended that a WG prepares a Tutorial as a Deliverable additional to the Technical Brochure and Electra article. This should complement the Technical Brochure and provide an introduction to it or highlight its key points. Where a Study Committee makes it a requirement that a WG produces a Tutorial presentation of a Technical Brochure, it is recommended that it is specified in the WG Terms of Reference and preparation of the tutorial material is completed before the WG is disbanded.

Where a Tutorial is produced to complement a Technical Brochure, it should be completed at the same time as the Technical Brochure and associated Electra article. The WG convenor is responsible for ensuring that the Tutorial material is of a suitable standard.

Normally, a Tutorial presentation of a Technical Brochure will be presented by a member of the relevant WG. The presentation should comply with the Rules and advice given below.

### 3.4 Cooperation among all SCs' convenors of the Tutorial Advisory Groups

The TC asks the convenor of one of the SCs' TAGs to convene telephone or web conferences and, at least every 2 years, a physical meeting of all SCs' TAG convenors. The purpose of this cooperation is to exchange experience and best practice, to identify and solve issues, and to address and evolve copyright, ownership and financial questions in case the respective sections below do not give sufficiently detailed guidance.

## 4 OWNERSHIP OF TUTORIALS

Tutorial material is CIGRE property; contents are protected by the appropriate measures taken (copyright), and kept for CIGRE's exclusive use. It is not to be sold outside the Association. The cooperation of all SCs' TAG convenors evolves and, if necessary, details ownership and intellectual property rules. Companies, even if they are CIGRE members, are not permitted to receive payment for the delivery of CIGRE tutorials or to deliver them in their names. CIGRE also reserves the right

of translation: Translation into a different language can only be done under the responsibility of an NC, so that the intellectual property clearly stays with CIGRE. The final, NC-approved translated version will be considered TC-approved unless the CO raises an objection.

## 5 FINANCIAL RULES

A fee may be charged to attend the tutorial. This fee is intended to cover expenses incurred by the event organiser who is responsible for the financial balance.

In exceptional cases, the event organiser may, through the attendance fee, recover all or part of the expenditure related to lecturers' reasonable travel, accommodation and subsistence expenses.

## 6 RECOMMENDATIONS FOR THE DELIVERY OF TUTORIALS

### 6.1 Rules

- Tutorials should be planned as educational sessions and not duplicate technical sessions at events.
- A slide should be included near the beginning of a presentation noting the following:  
*Copyright © [include the appropriate year]*  
This tutorial has been prepared based upon the work of CIGRE and its Working Groups. If it is used in total or in part, proper reference and credit should be given to CIGRE

Disclaimer notice

“CIGRE gives no warranty or assurance about the contents of this publication, nor does it accept any responsibility, as to the accuracy or exhaustiveness of the information. All implied warranties and conditions are excluded to the maximum extent permitted by law.”

- Content should be technically sound and applicable to the area of expertise of the SC responsible for the tutorial's preparation and delivery.
- Presentation should be professional.
- Overt promotion of particular companies or products must be avoided and balanced overview of relevant alternative products or methods should be given.
- In tutorial presentations, CIGRE identification should be included on every slide and, otherwise, the format should comply with the template provided by the event organisers or the relevant TAG. Exceptions require approval by the SC Chair.
- No commercial/company logos must appear on any of the slides except the slide introducing the lecturer where a logo may appear in reasonable size.
- Proper reference to sources used should always be made, and where necessary, a copyright release obtained from the author or publisher.

In addition, special care should be given to develop a tutorial applicable to the needs of the host country.

### 6.2 Presentation advice

For tutorials to achieve their objective, they:

- must have regard for the needs of attendees from the location where the tutorial is delivered;
- must be tailored to the audience;

- must be attractive/interesting to attract young engineers and students, and in some cases non-engineers, such as government agencies, financial experts, regulators, etc.;
- should use the opportunity to communicate specific messages appropriate to the audience, e.g. communicate environmental considerations & constraints to government agencies.

The time allotted to a tutorial and its focus will depend on the audience to which it is being aimed and should be agreed between the presenter and the event organiser.

In addition, it is recommended to:

- give a small review group of SC members the chance to review the presentation in advance of delivery to a wider audience.
- make a slide which is presenting the structure of the presentation.
  - When presenting the main content of a Technical Brochure (TB), it need not have the same structure as given in the TB but it shall be selected to make a good overview and a logical build-up of knowledge.
- summarize the information on the slides.
  - In case extensive information is needed to explain a specific part, put additional information in the “Notes”-field and present it rather verbally or by some “extra” slides during the question session in the end.
- avoid complicated equations and detailed tables, unless they are logically prepared so they easily can be understood and followed.
- build up the presentation so that it can be presented during the allotted time with time left for questions and discussion.
  - For example, a session of 75 minutes, approximately 1 hour may be used for a presentation; this should have a reasonable number of slides, e.g. no more than 30 - 40. The focus in this part should be on the most important issues leaving the deepest technical details to the second part, i.e. to the questions for 10-15 minutes. In total, the content should therefore be possible to present within about 60 -75 minutes.
- invite a peer review of draft tutorial material before it is finalised and presented.

Although overt promotion of particular companies or products must be avoided, examples – which might happen to concern what particular companies have done or sell – can be useful to illustrate the ideas provided they are presented in that spirit.

- Examples can usually get a message across more clearly than abstract concepts

It can often be very useful to provide examples of further reading or sources of information

- The Notes sections of slides or additional slides at the end might be used for this.

Graphs, charts or pictures can convey more than plain text.

- Over-complicated graphics should be avoided; given suitable explanations, the viewer should be able to understand what they are looking at.
- The presenter should think about what features they want to highlight and that they think will be interesting to the audience.

USE	AVOID
a limited number of words per slide for education purposes (< $\approx 75$ )	text boxes if not really needed
key words and bullet points if possible	mixing different colours and different fonts except when really needed
some space (“air”) between items	complicated equations if not verbally prepared and explained
full explanation text in titles/axes in diagrams being sure to include correct units, e.g. “Electrical Conductivity, $\sigma$ [S/m]”	
<b>bold</b> or <u>underline</u> for highlighted text	

### 6.3 Access to tutorial material

Organisers of tutorials are recommended to make tutorial material available to attendees. Ideally, the material will be provided at the latest one week before the tutorial starts so that attendees have the opportunity to study it and, in principle, will be better able to follow the tutorial and ask pertinent questions. However, the material should be made available to attendees by no later than the start of the tutorial. On occasion, tutorial presenters may have included material in their presentations that they wish to not be included in the printed or electronic material made available to attendees or archived. Examples of such material might include unpublished technical information or information only for CIGRE members.

It is left to the organiser of the tutorial to decide whether the material is made available as printed handouts or electronically. Any relevant costs may be recovered in accordance with the Financial Rules noted in section 5.

The SC on behalf of which the tutorial is presented is responsible for ensuring that an archive of their SC’s tutorial material is maintained. The SC is recommended to make it available to CIGRE members via a suitable website (see section 3.1).

## 7 PERFORMANCE MONITORING

- Short standard evaluation forms will be distributed and collected at the end of each tutorial.
- Input from these surveys will be used as a feedback process for future tutorials.