Document Title: **Design, Development and Review of External Presentations**

Approval Authority: **Bureau Chief**

A.   **PURPOSE AND SCOPE**

The purpose of this Bureau Operating Procedure (BOP) is to establish and describe the requirements for controlling the activities associated with the design and revision of the standard safety and health training presentations provided to the public. This section applies to the design and periodic review and revision of the presentations provided externally to employers, employees, and citizens of North Carolina.

B.   **DEVELOPMENT ACTION STEPS FOR NEW PRESENTATIONS**

1.   The designer will ensure familiarity with the appropriate subject matter. The designer's presentations shall be designed using the standard NCDOL presentation template, instructional principles with a logical flow and, as a minimum, consist of:

    a. Learning objectives slide
    b. Body of content
    c. Summary slide
    d. A review of the presentation for the following:

        i.   Accuracy of the information on the slide;
        ii. Ensuring the presentation progresses alphabetically according to the standard. If it goes in a different order, it needs some explanation;
       iii. Ensuring speaker's notes match the slide and ensuring there is an explanation in the notes for skipped portions of the standard;
       iv. Ensuring there is an explanation regarding manufacturer's recommendations, consensus standards, Filed Information System (FIS) policies or other information included that is not directly from the standard;
       v. Checking titles and references against the text;
       vi. Ensuring pictures match the text on the slide;
       vii. Ensuring the picture on each slide has an applicable description in the speaker's notes;
      viii. Eliminating duplication;
       ix. Checking effective dates and publication dates;
       x. Ensuring terms are defined (at least in notes);
       xi. Ensuring statistics are sourced and dated (at least in notes);
      xii. Ensuring appropriate frequently asked questions (FAQs) and answers are supplied in the notes section as applicable.

xiii. Ensuring photographs are properly sourced and compliant with internal citation guidelines.

Upon completion, the designer will submit the presentation to the Training Supervisor for format, speaker notes and copyright review to ensure photographs are properly sourced and are compliant with internal photograph and presentation citation guidelines.

Upon completion, the Training Supervisor will submit the presentation to the Standards Supervisor for assignment. The presentation will then be reviewed by the assigned Standards Officer for content and consistency with current guidance and standards as appropriate and as a minimum include a review of the items in 1(d) of this section, excluding the image sourcing, which will be completed by others in the review process. If only minor changes need to be made, the Standards Officer will make the necessary changes and forward the presentation to the Standards Supervisor.

If major changes need to be made, the Standards Officer will discuss recommended changes with the Standards Supervisor, who will determine a course of action. Upon final completion of the Standards review, the presentation will be submitted to the Standards Supervisor for the final standards compliance review.

2. Upon completion of the standards compliance review, the presentation will be submitted to the Bureau Chief for the final review.

3. Upon completion of the final review process, the Bureau Chief will submit the presentation to Planning, Statistics and Information Management (PSIM) and Communications and copy the Training Supervisor. Communications will review the presentation for grammar and PSIM will review for compliance with the internal photograph and citation guidelines. Once complete, PSIM and Communications will return the presentation to the Training Supervisor.

4. Upon receipt of the revised presentation from PSIM and Communications, the Training Supervisor will make the necessary changes to finalize the presentation. The Training Supervisor will then split the primary presentation into two separate presentations; one for the internet (using the external template for external use only) and one for the One Stop Shop (using the internal template for internal use only).

5. The Training Supervisor will save the uncompressed files and compress a copy for upload to the internet and the One Stop Shop. The Training Supervisor will upload the external version to the NCDOL website and upload the internal version to the webinar platform. The Training Supervisor will send the internal version to the FIS coordinator and the external version to the Database Manager, and when applicable, the processing assistant.

a. The FIS Coordinator will upload the internal version to the One Stop Shop.

b. The Database Manager will update the resource CDs with the external version.

c. The processing assistant will add the external versions to flash drives used for distribution at training and outreach events.

C. **REGULATORY UPDATE ACTION STEPS**

1. The Standards Supervisor will submit a Training Presentation Change Control Request form to the Training Supervisor that new standards guidance affects a presentation.

2. The Training Supervisor will update the presentation and follow guidelines for presentation design and development as outlined in Section B of this document, as applicable depending on the complexity of the revision. See ETTA External Training PowerPoint Development/Review Process Flow Diagram for details on the revision process.

D. **GENERAL CHANGE ACTION STEPS**

1. Any employee can initiate a change request for an existing presentation by submitting a Training Presentation Change Control Request to the Training Supervisor.

2. Upon receipt of a change control request, the Training Supervisor will determine the level of priority and a subsequent course of action.

3. The Training Supervisor will follow guidelines for presentation design and development as outlined in section B of this document, as applicable depending on the complexity of the revision. See ETTA External Training PowerPoint Development/Review Process Flow Diagram for details on the revision process.

E. **ATTACHMENTS**
- Photograph Approval & Use Frequently Asked Questions and Guidelines
- Training Presentation Change Control Request form
- ETTA External Training PowerPoint Development/Review Process Flow Diagram
- Letter Requesting Permission to Take and/or Use Photos

F. **REVISIONS**

- Revision 1: 1-13-2010 – Addition of Communications Department in presentation review process.
- Revision 2: 4-14-2011 – Added annual review and modified documentation required within the properties section of the PowerPoint.

- Revision 3: 9-13-2011 – Restructured and simplified to include development and review guidelines. Also, added required notations for revised presentations and picture review process. Modified language to include One Stop Shop administrator.
- Revision 4: 1-31-2012 – Rewrote for clarification and to reflect new process flow. Also, added process flow diagram attachment.
- Revision 5: 1-03-2017 – Document was completely reworked to accommodate procedural changes.
- Revision 6: 12/28/2017 – Replaced references to Presentation Manager and Presentation Update Coordinator with Training Supervisor. Added additional attachments.
- Reviewed: 1/04/2019
- Reviewed: 1/15/2020
- Revision 7: 2/01/2021 – Minor changes.
- Reviewed: 2/18/22