CAGP

Call for Proposals – Information for Presenters

Conference Theme and Objectives

You are invited to participate in CAGP's 25th National Conference on Strategic Philanthropy in Winnipeg April 11-13, 2018. Our theme this year is ***Explore the Future of Generosity*** at The Forks: Canada's Historical Meeting Place.

Objectives

- Advanced Learning
- New Strategies
- Strong Networking

Our Delegates

The annual conference is a showcase for gift planners, fundraisers and professional advisors to exchange information, knowledge and ideas on all aspects of the gift planning process, from the interpersonal to the highly technical. We are expecting an attendance of 300 delegates from across the country.

CAGP members are people who work in charities, promoting the idea of leaving a legacy and helping people understand how to do it; and professional advisors – lawyers, insurance brokers, accountants, financial planners etc. who advise clients at all ages and stages on the management and disposition of their wealth.

Call for Proposals

We are seeking proposals for sessions that will:

- Attract and serve a rich, diverse audience
- Support the conference themes and objectives
- Are relevant and engaging for attendees at all levels of experience and across the professional spectrum of gift planners.
- Address not only the traditional topics of gift planning, but speak to the changing face of philanthropy
- Clearly demonstrate how an understanding of gift planning wisdom can help organizations, communities and donors achieve their philanthropic dreams
- Engage delegates through creativity and interaction, a variety of approaches, concepts and applications

Potential Session Topics
Speakers are encouraged to consider the following topics for their proposals as well as submitting additional topics of interest to our delegates.

- Testamentary gifts, insurance, registered funds
- Strategic giving case studies
- Advanced gift vehicles: e.g. gifts of options, dividends, flow through shares, real estate, CRT's
- Current & future demographics, changing demographics and gift planning with different generations
- Presentation skills
- Closing a gift
- Working with people who are bereaved or facing their mortality
- Ethics
- Leadership Development
- Hiring/Motivation/Evaluation/Training
- Benchmarks & Metrics
- Integrated gift planning
- Working in education, health, faith-based, community foundations, arts/cultural sectors
- Gift Planning in a small shop
- Creating a gift planning case for support for your Board
- Non-profit accounting/gift processing (issuing receipts, administering estates, completing T3010s, etc.)
- Research & analytics
- Marketing methods e.g. advertising, direct marketing, face-to-face, social media etc.
- Websites & e-marketing
- Working with executors and trust companies
- The new estate law impact on estate administration
- Donor Visits
- Estate Planning Presentations Best Practices
- Relationship building
- Diversity & Inclusion in gift planning
- Recognition and Stewardship
- Managing a Gift Planning Portfolio- including established gift planning prospects
- Legal, regulatory and financial aspects of gift planning, the application of gift tools, gift administration
- Policies & procedures
- Legal obligations of the charity (e.g. deeds and agreements)
- Endowment and investment policies and procedures
- What's next for Gift Planning? New innovations, developments

The deadline for session proposals is June 30, 2017.

SESSION FORMATS:
We are seeking proposals for sessions, either 60 or 90 minutes in length. Sessions allocated to the 90-minute slots are typically panel/case studies where there are several presenters or more in depth information.

I. Workshop Presentation: Workshops should be a combination of presentation and dialogue with participants

Length: 60 or 90 minutes

II. Panel Discussions: Panels should reflect diverse views and experiences. Panel presentations may feature no more than four panelists.

Length: 60 or 90 minutes

TOPIC STREAMS:
Topic streams enable delegates to streamline their session choices and ensure their conference education covers the gift planning bases. You will be asked to select a stream in which your session fits.

GIFT PLANNING ESSENTIALS: Sessions that deliver knowledge and concepts fundamental for gift planners who are new to the profession or seeking a refresher on a certain topic.

SKILLS & COMPETENCIES: Successful gift planners and advisors require a broad range of knowledge and expertise to manage a complex array of tasks. These sessions focus on the development of professional skills that will maximize performance and optimize impact.

MANAGING A GIFT PLANNING PROGRAM: Strategic charitable gift planning often brings unique opportunities and challenges. These sessions will enable delegates to proactively tackle challenges and pursue opportunities to manage gift planning programs with excellence.

COMMUNICATIONS & MARKETING: These sessions introduce delegates to the newest and greatest ideas to develop and distribute targeted gift planning marketing and communications collateral across multi-media platforms.

DONOR/CLIENT RELATIONS: Sessions that explore the art of being truly donor- / client-centred, as experienced professionals share strategies and tactics for building an authentic rapport with donors and clients that will evolve relationships from the transactional to transformational.

GOVERNANCE/FINANCE: Philanthropists are becoming increasingly involved and savvy, and estates are becoming more complex, making a sound understanding of governance and financial matters integral to success. These sessions reach beyond gift and estate planning to the broader spectrum of charity management and oversight.

TECHNICAL EXPERTISE: These sessions will help professionals hone their technical knowledge and sharpen their expertise to support donors / clients along their philanthropic journey, and manage their gift planning program or practice with confidence and competence.

EDUCATIONAL LEVELS:

Please tailor your session to address one of the following educational levels:

INTRODUCTORY: Concerned with teaching basic GP skills
Best suited to: Those with less than 2 years of GP, those who currently work in Major, Annual or Campaign positions who wish to learn more about GP, Board members or other Charity staff who are considering establishing a GP program at their organization.

INTERMEDIATE: Concerned with advancing or improving an active gift planning program (both the technical and humanistic aspects of GP). Best suited to: Those who have worked in GP or a related discipline for more than 2 years, e.g. GP officers, Board members and other charity staff who work on major giving, annual campaign, donor relations, GP policy, financial transactions and/or administration. Also suitable for professional advisors with an interest in improving their technical knowledge and basic skills in GP.

ADVANCED: Concerned with the more detailed technical, regulatory and legal aspects of GP when dealing with donors/clients who are looking for expert advice related to complex, transformational gifts.
Best suited to: Those with 5 or more years in GP and professional advisors who follow a values-based, holistic approach in serving clients, and wish to incorporate charitable giving into their practice.

GENERAL: Educational sessions that would be of interest to gift planners, professional advisors or charity staff, volunteers or board members with any level of GP experience.

EXPECTATIONS OF PRESENTERS:

Presenters are expected to:

- Work closely with the Conference Program Committee and conference staff in advance of the conference

- Review the attached article on writing conference session descriptions and ensure the session description provides clear learning objectives and accurately describes what the actual presentation will deliver

- Make no substantive changes in content, process, names or numbers of presenters without the approval of the Program Committee

- Provide a complete presentation in electronic format **by March 19, 2018**. Conference delegates will be able to access the papers on the CAGP website. Access will be password protected and available to registered delegates only

- Agree to have the session audio and video recorded (if appropriate) and the presentation captured electronically onsite

- Agree to refrain from marketing their products or services

- Present without remuneration. While we are enormously appreciative of the contribution of our workshop presenters, our budget, unfortunately, does not allow for a speakers fee or for reimbursement of expenses related to your participation in the conference.

PROPOSAL SELECTION CRITERIA:

We seek diversity in methodology, topics and sector focus, size of shop, experience level and demographics of presenters. We also try to balance regional representation with showcasing the experience and knowledge of presenters in the city where the conference is held.

The Conference Program Committee, using a pre-established review process, will evaluate proposals. Acceptance will be based on the following criteria:

- Clear session purpose, description and intended results
- Presentation of ideas, experience and learning that reflects new thinking and/or improves the field of gift planning
- Level of audience engagement
- Draws on documented theory and/or practice
- A clear relationship between the session content and the conference theme and any or all of the conference objectives

CAGP

An individual may submit more than one proposal. Each will be evaluated separately.

Please note that because we look for a diversity of topics and speakers we prefer not to have any one speaker present twice nor include more than two sessions from the same organization in the program unless the decision to do so is made by the Program Committee at the time of selection.

SUBMISSION INFORMATION:

To submit your session proposal, please go to our online session submission form – https://www.surveymonkey.com/r/LDQVMDQ

The deadline for session proposals is June 30, 2017.

The primary presenter on the Session Proposal form will be notified of acceptance in mid October 2017.

In the online submission form you will be asked to complete these questions to submit a session proposal:

1. Primary Presenter Name & Contact Information
2. Additional Presenters with contact information
3. Day/Time Conflicts
4. Will you provide a Workshop Presentation or Panel session?
5. Choose the length of your session – 60 or 90 minutes
6. Choose the topic stream for your session
7. What is the education level of your session?
8. Session Title
9. What are the goals of your session?
10. Who do you think your session would appeal to?
11. What will participants learn?
12. How do you plan to engage the participants?
13. How will your session address the theme/objectives of the conference?
14. Provide a 75 word abstract of your proposal
15. Provide a more descriptive abstract of the session (250 words)
16. Speaker Biographies (100 words each)
17. Teaching or Speaking Experience in the past two years

FURTHER INFORMATION:
If you have any questions, please contact:

Erin Kuhns
Professional Development
Tel: 1-888-430-9494
Email: ekuhns@cagp-acpdp.org

Diane Laundy
Conference Coordinator
Tel: 613-715-9248
Email: diane@btsconferences.com

Writing Conference Session Descriptions
From http://velvetchainsaw.com/2010/03/18/crafting-better-conference-materials-writing-session-descriptions-for-dummies/

Begin With The End In Mind

When writing conference session descriptions and learner objectives, it's best to begin with the end in mind. Identify the three to five main points that you want the attendees to remember. Then craft the description around these points.

The session description uses brief, succinct sentences about what the presentation will cover. The Learner Objectives (LOs) are statements that describe what the participant is expected to achieve as result of attending the session. Each of these plays a vital role in getting the attendee to read the session marketing material and ultimately attend the session.

The Session Description

Let's face it. Most conference session descriptions are boring and thus attendees think the session is boring as well.

The art and science of writing good workshop descriptions involves strategically writing words that promote a person, presentation, opinion or idea, with the ultimate intention of having the reader attend the session. So the purpose of the first sentence in the workshop description is to get the reader to read the next sentence, and to think, "Hmm, I want more." After reading the second or third sentence, the goal is to get the reader to say, "I think I may want to attend this session, let's look at the learner objectives."

The word limits imposed on most session descriptions is not the challenge. It's choosing the right words to accurately describe the session, pull the reader in and get the reader to commit to attending the session. If you can't accurately describe your presentation within the word limit, you may need to start over and think of the three ideas that you want attendees to remember from your presentation.

First, focus on the reader and potential attendee. Well-crafted session descriptions make a promise and focus immediately on the benefit to the potential attendee.

Second, address WIIFM "What's in it for me" quickly.

Four Step Benefit Writing

Top copywriter Clayton Makepiece has a four step benefits writing process for persuading the reader to action. Here's how to use his process for writing conference session descriptions:

1. Make a list of every feature of attending the session.
2. Ask why each feature is included in the first place.
3. Take the why and ask how this connects with the prospective attendee's desires.
4. Get to the absolute root of what's in it for the attendee at an emotional level.

Example

Session Title
What Everyone Ought To Know About The Macro Trends Affecting Meetings And Travel Industry

Feature:
The 2010 macro trends affecting meetings and travel.

Why it's there:
"Helps attendees understand the challenges and current state of the industry."

What's in it for them?
"Helps you stay at the forefront on the industry and competition."

Emotional Root:
"Prepare for the challenges facing the industry today that are redefining business without getting stressed from experiencing unknown and unexpected changes."

Final Session Title And Description In Less Than 75 Words

What Everyone Ought To Know About The Macro Trends Affecting Meetings And Travel Industry

Stressed about 2010 industry and economic unknowns? Discover the industry's 2010 macro trends and prepare now for the challenges facing the meetings and travel industry today. A distinguished group of panelists will help you stay at the forefront of the industry's changing business landscape and one step ahead of your competition. Prepare for the challenges facing the industry today that are redefining business without getting stressed from experiencing unknown and unexpected changes.

When writing the session description, first help the attendee's right brain create desire, then satisfy the left brain with features and promises of information so that their body actually walks into that session.

Keep it simple. Good copy is written in clear, concise, simple words that get your point across.

It’s conversational. Don’t allow the reader to question why they are reading it or why they want to attend. Save the creditability and expert references for the speaker’s bio.