



# CGP CONFERENCE

October 2-4, 2019 ■ New Orleans Marriott

## Call for Presentations Worksheet

You will be asked for the following information when you submit a proposal in the [Call for Presentations system](#).

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Thank you for your interest in speaking at the 2019 CGP Conference. The conference attracts more than 800 planners from all types of charitable organizations and advising professions. Most have more than 10 years of gift planning experience. To meet their high expectations, your proposal should convey:

- **Uniqueness:** Is this a presentation that you could only find at CGP? We attempt to strike a balance between speakers who are well-known to our attendees and those who bring a new perspective. We welcome presentations that have been well received by local or regional audiences. We are unlikely to accept sessions that have already been presented at other national gift planning conferences, unless they have been substantially updated.
- **Attendee Priorities:** We are especially interested in presentations that respond to interests and needs of our attendees and show deep familiarity with trends and current challenges and opportunities in the world of philanthropy.
- **Active Learning:** An increasing body of research shows that adults learn better when they are actively engaged in applying content to their own challenges, rather than passively listening to a lecture. We prefer proposals that include strong plans for active learning.
- **Practicality:** We review proposed learning objectives and ask, “Does the presentation provide information that is immediately useful in practice?”

## Conference Tracks

You will be asked to suggest the appropriate track for your session. The conference committee will make final track assignments. The conference includes the following tracks:

**Planned Gift Tech**--Vehicles and assets, timing and taxes—these are the interlocking gears that set planned gifts apart from current gifts of cash. In these sessions, expert presenters explore the fundamentals and creative applications of planned gift technology. Case-based sessions show how rules and regulations are applied to specific donor situations.

**Getting Oriented**--The average major gift takes around 18 months to close; planned gifts can take 3 or more years. What are successful gift planners doing with all that time? These sessions for early career gift planners show you how to work with a prospect through all phases of the gift planning process, from identification and cultivation through gift design and stewardship.

**Collaboration Lab**--Great gifts have triple impact. They inspire philanthropists, accelerate charitable work, and reward expert advisors. Sessions in this track build skills for collaboration among fundraising teams, and between fundraisers and donor advisors. Approaches to building donor-focused philanthropic plans that blend current and deferred elements are also part of this track.

**Program Administration and Management**--From start-up to well-oiled machine, gift planning programs need to be managed to the highest standards of transparency and prudence. Policies and procedures, metrics and benchmarks, ethics and accountability—all are essential in a successful gift planning effort. These sessions show how to apply research and proven best practices to your own gift planning operations.

**Marketing and Communications**--What makes your message unique? Does it cut through the clutter to reach the right people with a powerful appeal? Do you KNOW who it reached and how they responded? In these sessions, work with peers and marketing masters to explore database analytics, segmented messaging, effective storytelling and other components of your effort to identify and persuade planned gift prospects.

If you are chosen to speak:

- Breakout speakers receive free conference registration and one complimentary night at the New Orleans Marriott. We do not provide complimentary rooms in other hotels.

Important Dates

**March 1:** Call for Presentations closes at midnight Eastern time. You may make changes to your proposal until that time.

**April 8:** All speakers who participate in the Call for Presentations will be notified whether or not their session has been selected for the conference program.

**September 9:** Conference papers are due. All breakout speakers are required to submit a paper--slides alone are not accepted. Paper guidelines will be provided.

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**Please collect the following information to enter into the Call for Presentations system.**

**About the Presenter(s)** In the Call for Presentations system, you will be asked to select a “correspondent” who will be the primary contact to receive messages from CGP about the status of your submission.

**Presenter 1**

First Name\*: \_\_\_\_\_

Last Name\*: \_\_\_\_\_

Professional credentials: \_\_\_\_\_

Title\*: \_\_\_\_\_

Organization\*: \_\_\_\_\_

Street Address\*: \_\_\_\_\_

Apt/Suite/Office: \_\_\_\_\_

City\*: \_\_\_\_\_

State\*: \_\_\_\_\_

Zip\*: \_\_\_\_\_

Country: \_\_\_\_\_

Email Address\*: \_\_\_\_\_

Phone Number\*: \_\_\_\_\_

Fax Number: \_\_\_\_\_

Mobile Phone: \_\_\_\_\_

Website: \_\_\_\_\_

**Bio (maximum 250 words)\***

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**Photo (upload in jpg or png format)**

**References (Name, Professional Title, Organization, phone number and email address for two people who have heard the presenter speak)**

**Reference 1\*** \_\_\_\_\_

\_\_\_\_\_

**Reference 2\*** \_\_\_\_\_

\_\_\_\_\_

**Presenter 2**

First Name: \_\_\_\_\_

Last Name: \_\_\_\_\_

Professional credentials: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Street Address: \_\_\_\_\_

Apt/Suite/Office: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_

Zip: \_\_\_\_\_

Country: \_\_\_\_\_

Email Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

Mobile Phone: \_\_\_\_\_

Website: \_\_\_\_\_

**Bio (maximum 250 words)**

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**Photo (upload in jpg or png format)**

Reference 1\* \_\_\_\_\_  
\_\_\_\_\_

Reference 2\* \_\_\_\_\_  
\_\_\_\_\_  
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**About the Presentation**

**1) Presentation Title (maximum 10 words)\***

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**2) Presentation Type**—all Breakouts are 60 minutes in length (Note that the majority of proposals we receive are for Traditional sessions. Submissions of other types attract more interest from the review committee.)

**( ) Traditional**—40 minutes of formal presentation followed by 20 minutes of attendee discussion and Q and A.

**( ) Flipped**—20 minutes of formal presentation followed by 40 minutes of attendee engagement, including for example role playing, case study analysis, point/counterpoint, etc.

**( ) Research**—The presenter will review findings of original research or data from previously conducted research. The presentation must be original (even if previously published findings are used) and practical recommendations based on research findings should be presented.

**( ) How-to**—These sessions focus on specific steps for completing a process, e.g., effective bequest program administration, starting a donor advised fund, etc. (Note that “how-to” topics are not necessarily for novice gift planners.)

**3) Presentation Level**

Please select the audience to which your presentation will be directed.

**( ) Advanced Sessions:** designed for senior planners with extensive experience in soliciting, structuring and closing planned gifts.

**( ) Intermediate Sessions:** assume a basic understanding of common gift planning tools and procedures.

**( ) Foundational Learning Sessions:** present basic information on gift planning tools and procedures; no previous experience is required.

#### 4) Track

Please select the track most appropriate for your presentation.

Tracks this year are designed to help attendees connect with content and with peers. We are especially interested in speakers who are peers of the audience likely to attend this track, and who are presenting current, direct experience with the priorities, opportunities and constraints of this work environment. Attendees are not required to stay in the same track throughout the conference. However, they have that option.

**Planned Gift Tech**

**Getting Oriented**

**Collaboration Lab**

**Program Administration and Management**

**Marketing and Communications**

#### 5) Learning Objectives

Please indicate three specific things that attendees will know or be able to do at the end of your session. Attendees will evaluate your session according to your success in achieving your stated objectives. Learning objectives also help to promote your session, so take time to make them strong. Here are some resources to help:

[Beyond SMART: Writing Effective Learning Objectives](#)  
[Intended Learning Outcomes](#)

#### 6) Breakout Description (maximum 250 words)\*

This description will be used to promote your session if it is selected.

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## 7) Presentation Outline

Please upload a Word or PDF file providing the following information required for your presentation format. This outline is NOT your final paper, however, it should provide enough detail to allow the program committee to evaluate appropriateness for the CGP audience.

- **Traditional and Flipped:** Please upload a detailed outline of the material you plan to cover. For flipped sessions, include your plan for engaging attendees in learning activities.
- **Research:** Please upload a description of the proposed project, including objectives, research methodology (including description of population if survey research will be conducted) and product or application of results. Data from previously conducted research may be used, but the presentation must be original and results should be applied to the track.
- **How-to:** Please upload a detailed outline of the material you plan to cover, with emphasis on key steps or tips that are involved in the activity or process you are describing.