



## The 31<sup>st</sup> Annual Northern California

# Planned Giving Conference

Dear Applicant,

Thank you for your interest in presenting at our 31<sup>st</sup> Annual Northern California Planned Giving Conference! Our conference is the premier opportunity to learn about planned giving, to connect with counterparts in other charities, to network with professional advisors, and to see friends, old and new.

**Our 2024 conference will be held on May 17 at the San Francisco Airport Marriott Waterfront!**

Our conference includes sixteen breakout sessions, broken down into four tracks:

- **Fundamentals.** This track is for individuals who are new to planned giving and charities who are considering launching a planned giving program.
- **Cultivation & Administration.** This track focuses on donor relationships, working with professional advisors, and gift and estate management and administration.
- **Technical.** This track is for experienced planned giving professionals and includes topics such as gifts of complex assets and advanced planning techniques.
- **Special Topics in Planned Giving.** This track allows us to select topics that are outside of the tried-and-true planned giving box. Past presentations in this track have included Diversity, Equity, and Inclusion, Engaging More Women Donors, and Engaging Senior Donors.

Starting on page 7 of this document we have included some Speaker Guidelines as well as Tips for a Great Presentation. **On the last page of this packet is a list of additional speaking opportunities with NCPGC throughout the year and instructions on how to let us know if you would like to be considered for one of our other programs.**

To submit a proposal, please complete and send the attached **Proposal Application no later than February 14, 2024**, to [info@ncpgcouncil.org](mailto:info@ncpgcouncil.org).

**If your proposal is selected, please be aware of the following:**

- ☐ **Complimentary conference registration** is provided for one speaker per presentation selected for the conference. That is, if you propose a presentation with more than one presenter, the additional presenters will be responsible for their conference registration. Reminder: This is a volunteer commitment and compensation for travel expenses will not be provided.



On behalf of the Conference Committee, thank you for submitting a proposal for the 31<sup>st</sup> Annual Northern California Planned Giving Conference. We look forward to seeing you there!

Sincerely,

**Devi Ati**

Devi Ati  
Conference Co-chair

**David Lloyd**

David Lloyd  
Conference Co-chair



## PROPOSAL APPLICATION

Please complete the following application in its entirety.

### *Biographic Information:*

Name	
Position	
Company	
Email	
Address	
City, State, Zip	
Telephone	
Short Bio (25 words maximum)	

### *Proposed Presentation Information:*

Title of Presentation	
Summary of Presentation (25 words maximum)	



<p><b>Description of Presentation</b> (100 words maximum)</p>	
<p><b>Track Selection</b> (Which track is the best fit for your presentation?)</p>	<p><input type="checkbox"/> Fundamentals,  <input type="checkbox"/> Cultivation &amp; Administration,  <input type="checkbox"/> Special Topics in Planned Giving  <input type="checkbox"/> Technical</p>

*References and previous presentation experience:*

<p><b>Reference 1</b> (Someone who has seen you present: Name, Title, Contact info)</p>	
<p><b>Reference 2</b> (Someone who has seen you present: Name, Title, Contact info)</p>	
<p><b>Have you ever presented at the Annual Northern California Planned Giving Conference before?</b></p>	
<p><b>Notable Prior Presentations</b> (Presentation Title, Event, Date)</p>	



**Continuing Education Requirements: *Check where needed***

*If you believe your presentation will qualify for continuing education, please indicate what type of continuing education, and review the criteria, below. Each session requires advance approval and we will need materials before the event to obtain approval.*

- CFRE    MCLE    CFP    CSPG    N/A    Not sure, need advice

Provide at least one learning objective. A learning objective must be a specific, measurable statement of what participants will learn in the program. Learning objectives must be realistic when considering the level of complexity and scope of the course.

---

---

---

---

---

---

---

---

**CFRE (Certified Fund-Raising Executive) qualification:**

What Knowledge Domain does your presentation address? Select all that apply:

- Current and Prospective Donor Research    Ethics, Accountability, and Professionalism  
 Leadership and Management    Relationship Building    Securing the Gift  
 Volunteer Involvement

**MCLE (Minimum Continuing Legal Education) qualification:** <sup>1</sup> All of the following must be true to qualify.

- I will provide substantive written materials  
 The presentation relates to legal subjects directly relevant to licensees of the Bar **or** has significant current professional and practical content.  
 I have significant professional or academic experience related to the content.

<sup>1</sup> Rules for attorney MCLE qualification can be found [here](#) and [here](#).



**CFP (Certified Financial Planner) qualification:**

1. Which [Principal Knowledge Topics](#) does your presentation fit within? Check all that apply:

- Estate Planning    General Principles of Financial Planning    Investment Planning
- Professional Conduct and Regulation    Psychology of Financial Planning
- Retirement Savings and Income Planning    Risk Management and Insurance Planning
- Tax Planning

2. What is the level of complexity?

- Overview    Intermediate    Advanced

**CSPG (Certified Specialist in Planned Giving - Cal State Long Beach)**

To qualify, the presentation must involve some aspect of planned giving and must be taught or discussed in a professional and formalized setting.

*Other:* We require each presentation to have at least one handout. This may take the form of a paper that is at least 4 pages or a presentation slide deck, however we understand not all presentations are conducive to those formats. If your presentation is selected and you agree to present, the Conference Committee will discuss the format and length of your handouts.

***Thank you for submitting your proposal application by February 14, 2024.***

***We will notify all selected applicants by March 1, 2024.***



## Some Speaker Guidelines

While these guidelines may seem self-evident, we hope they may serve as useful reminders as you prepare your presentation:

**Offer opportunities for active participation.** Feedback from previous conferences and our own experience shows that session participants appreciate and benefit most from sessions offering opportunity for active participation and interaction. We encourage you to seek out and create opportunities in your session to engage audience members.

**We love handouts.** All our “handouts” are distributed only online. Please provide your handouts in advance so that we can make them available in digital form to our participants prior to the conference. Participants really appreciate a good handout, both at the conference and back at work.

**Visually attractive presentation.** Visually lively slides, with color and graphics, help participants stay focused during your presentation.

**No business promotion.** Out of fairness and respect for all of our sponsors and attendees, we ask that session presenters focus their remarks on details germane to the workshop session and not use the forum to promote business for their company or involvement in their charitable organization. The conference provides very advantageous avenues for promoting companies and organizations outside of the session workshops.



## Tips for a Great Presentation<sup>2</sup>

### Stay Out of the Drone Zone

We promise our attendees that we will provide exceptional experiences, a vibrant community, and essential tools that will make them and their organization more successful. That means we need sessions that have

- Relevant content for an experienced audience that stretches their thinking and provides new approaches
- Content delivered in an engaging way and draws upon the experience of the attendees
- Application exercises that involve the participants
- Examples and case studies of real success, and successful failures! Attendees often cite these as the most beneficial of all sessions they attend.
- Practical tools and models that can be applied immediately in their organization

If you just talk at your audience and don't take an interest in what your attendees will experience, you're going to enter the Drone Zone. There's nothing worse than having to endure a boring presentation, so here are a few tips to help you liven up your session.

### What your attendees will remember

Once the conference is over and folks are back in their offices, what will they remember? While your presentation should be clear, concise, colorful and dynamic, the things that stay in people's memories are:

- What they did in your session—not what they saw or heard
- Exercises that demonstrated your points
- Stories and examples that painted a mental picture
- Powerful metaphors that serve as reminders
- Small group discussions of key learning points
- Interaction with peers

### What your attendees won't remember

- They won't remember much about your incredible statistics, even though your facts will build your credibility.
- They'll forget most of your jokes, although by giving them a few laughs, they'll be more receptive to your information and thinking.

---

<sup>2</sup> Taken from the American Society of Association Executives, 2013 International Conference Speaker Manual





- They won't remember how eloquent you were, although your clarity of thought will help them comprehend what you're trying to say.

### **No Sales Zone**

We've all had experiences when people pushed their products or services too hard, so we have established a "No Sales Zone" in our sessions. No matter how wonderful your product or service may be, attendees do not feel comfortable when they think you want them to buy something. If you let selling creep into your presentation, attendees will turn off and tune out—and they'll tell us about it in the evaluation of your session. Since the balance between communicating and selling is a little tricky, here are some guidelines:

- Developing credibility during your presentation is good, but it wears thin quickly. Name-dropping is particularly offensive if it goes on too long.
- Personal anecdotes can illustrate a point and make you seem warm and interesting, but use them sparingly. Listen more than you talk.
- Be an attentive listener to a person's situation and offer to help think through a situation or problem. Help them connect with others who have similar problems. Be an inviting resource, but don't push.
- If you wish to continue contact after the conference, you are allowed to have attendees voluntarily sign up for emails. You must make it clear it is only if they are interested in more information from you and/or your company. However, don't just send promotional material—that's selling.

### **Choose the Right Presentation Style**

As we've mentioned already, how you say something is often as important as what you are saying. Here are some presentation styles to consider.

- **Case Study**. This is an excellent way to illustrate challenges and ways of overcoming them. By having a real organization tell the story of a real problem and how they went about solving it, attendees can relate to the issue on a more personal level. Case studies can include real names and facts, or the information can be changed to protect the privacy of the players. Provided to attendees in advance or at the beginning of a program, case studies can be the basis for entire session discussion, or they can be used throughout or to illustrate a particular point.
- **Debate**. You can arrange a "pro vs. con" presentation in which panelists are split. Some present information in favor of a particular issue, while others in the group present the opposing side. This is also a good way to involve the audience (if there are volunteers!).



- **Game Show**. Using a game format can really engage session participants, adding fun and energy to a topic that otherwise might enter The Drone Zone. Anything from Jeopardy! (Several templates exist online to format the playing board) to Who Wants to Be a Millionaire can work. Games are also an excellent way to review information and can be a useful self-assessment tool as well.
- **Interrogation**. In this approach, the group questions one or more "experts" before an audience of observers. The idea is to bring out essential information from acknowledged experts, while effectively engaging and involving the audience.
- **Panel (with Q&A)**. A moderator poses questions or makes statements to the group, and group members discuss. Each panelist speaks for only a short time, since contributions continuing for more than two uninterrupted minutes tend to take away from the presentation. The idea is for the group to have a discussion for the benefit of the audience.
- **Role Play**. Participants assume the role of a particular person or type of person, and try to act as they might act in a particular given situation. Parameters for the scenario should be spelled out and facts should be clarified. Discussion among the larger group afterwards is a great way to utilize this method.
- **Roundtable Discussion**. This discussion is best used by smaller groups. It is often facilitated by one person (not necessarily a subject matter expert) who ensures that each participant has equal status, equal time to present his or her views, etc.
- **Speed Learning**. Here you provide essential information on 3-5 topics, with each presentation lasting no more than 10 minutes. After all presentations are completed, the group spends the remainder of the session time talking with the individual presenters about the topic (or topics) they are most interested in.
- **Top Ten**. This approach utilizes the popular "top ten" format and breaks down a topic into a specified number of parts, building up to Number One, the primary point of emphasis. This creates opportunities for audience interaction and creative delivery, adding fun and energy to the presentation.

## Tools

Consider utilizing unique and engaging ideas or tools to strengthen the presentation and encourage active listening and involvement from the audience.



- Multi-media presentation aids – add audio or video to your PowerPoint (but discuss with the NCPGC staff so they can make sure to have the right AV set up for you).
- Begin your session with Top Ten "Ah-ha's!" that will result from the presentation
- Make sure your handouts supplement or reinforce the information being presented in the session
- Award prizes for audience members who participate/answer questions
- Add personal experiences, stories or humor



## Northern California Planned Giving Council Program Offerings

In addition to the Annual Northern California Planned Giving Conference, NCPGC hosts several educational events each year. Our programs feature nationally recognized and locally esteemed experts in planned giving who speak on a wide variety of topics for a range of experience levels. For information about upcoming programs and previously held programs, please visit [www.ncpgcouncil.org](http://www.ncpgcouncil.org). Currently, our program offerings include:

- **Luncheon** meetings each year with speakers addressing a wide variety of topics affecting planned giving professionals.
- The **Heidi Strassburger Masters Program**, a program held in July dedicated to special topics in planned giving for intermediate and advanced gift planning professionals.
- The **Basics Course**, a virtual six-part planned giving introductory course which includes 15 hours of instruction from experienced planned giving practitioners in the Bay Area.

If you would like to be considered to present at any of the above listed programs, please indicate your interest by filling out the fields below. The NCPGC Program Chairs will reach out to you if an opportunity is available and an appropriate fit is determined.

Name	
Position	
Employer	
Email	
Title of Presentation	<i>If different than presentation being submitted.</i>
Summary of Presentation (25 words maximum)	<i>If different than presentation being submitted.</i>
Please select 1 or more	<input type="checkbox"/> Luncheon <input type="checkbox"/> Basics Course <input type="checkbox"/> Heidi Strassburger Masters Program