

Call for Proposals: 2023 CASE District VII Annual Conference

March 19-21, 2023 – Hilton San Francisco

Thank you for your interest in presenting at the 2023 CASE District VII Annual Conference! These guidelines will assist you in preparing and submitting a proposal. You will be required to identify the session format, audience level, content track, and learning outcomes in your submission.

- Proposals are due **October 14, 2022**. The conference program committee will review all proposals and speakers will be notified in early November.
- Special consideration will be given to proposals that align subject matter with the principles of diversity, equity, inclusion, and belonging in the advancement field.
- Proposals that feature or showcase collaboration across/between units, fields of expertise (e.g. alumni relations and marketing/communications) and/or organizations will be prioritized.
- Special consideration will be given to proposals in which key takeaways may be scaled to all institutions, regardless of type, size, or geographic location.
- Consultants may be part of a presentation, as long as at least one presenter is on staff at a CASE DVII member institution.
- By submitting a proposal, you acknowledge that if you are selected to speak, you and any co-presenter(s) must register and pay to attend the 2023 CASE District VII Conference.

Session Description

Session Title*

A session must have a short, specific presentation title (containing no abbreviations) that indicates the nature of the presentation. Please type your title in Title Case (each word capitalized).

Session Type*

Select one:

- **Presentation**
The presenters have significant skills and experience in the subject matter and will share their knowledge in a formal presentation. The goal is to inform, challenge, and inspire participants representing nonprofit foundations, independent schools, colleges, and universities. Audience participation is through Q&A.
- **Panel**
A panel of experts in the subject matter are guided through a topical presentation by a moderator. Each member of the panel brings an insightful angle on the topic by describing his or her personal or institutional experience. The goal is to allow participants to get a cross-institutional overview of the topic. Audience participation is through Q&A. The ideal number of participants in a panel is 4-5, including the moderator. Panelists from diverse backgrounds and/or institutions serving diverse segments of the population are encouraged to consider this opportunity.
- **Case Study**
The presenters provide an in-depth description of a specific experience that yielded success. The planning process, methods, and outcomes are shared. The goal is for participants to extrapolate

from specific situation information that may be relevant to their own shop. Audience participation is encouraged through active dialogue and Q&A.

- **Facilitated Group Discussion**

Led by experienced and dynamic speakers, all participants are invited to share ideas and explore content areas through breakout groups. Groups then share findings or ideas with all participants. Audience participation is the primary focus of the session. Facilitators are asked to tailor their presentation in a way that is applicable to advancement shops of all sizes.

Level of Audience Expertise*

Please select the primary intended level of audience expertise:

- **Level 1** – Early Career (acquire knowledge about the common core of the advancement function for new professionals and mid-career professionals transitioning into advancement.)
- **Level 2** – Emerging Early Career (develop technical, explicit knowledge in a chosen specialty and grow skills in the advancement competencies)
- **Level 3** – Practicing/maturing Mid-Career (work on achieving fluency in all aspects of advancement and grow leadership skills and gain a deeper understanding of ethics)
- **Level 4** - Senior/experienced Mid-Career (develop deep expertise in your discipline and your understanding of other disciplines)
- **Level 5**- Expert Seasoned Professional (develop an understanding of the role advancement plays in executing higher-level institutional strategy)
- **Level 6** - Leadership/Transforming Seasoned Professional (contribute with work that is more strategic than managerial and maintain a multidisciplinary understanding and portfolio)
- **All Levels** - All audience levels from beginner to advanced will benefit.

Please select the discipline that applies to your session. *

- **Advancement Services**
- **Alumni Relations**
- **Fundraising**
- **Marketing and Communications**

Please select all CASE competencies that apply to your session. *

- **Global and Cultural Competence**
Working effectively with and for people from different geographies and cultural perspectives (Cultural intelligence, understanding bias, creating a safe work environment for all)
- **Integrity and Professionalism**
Excellence in conduct representing oneself and one's institution and the profession (Builds and maintains trust, ethical conduct, personal accountability, storytelling, effective communicator, presenter and facilitator)
- **Business and Financial Acumen**
Understands the business situation and financial factors and takes responsibility for the best course of action (Data based decision making, financial fluency, institutional business knowledge, industry business knowledge)
- **Industry/Sector Expertise**

Focused upon knowledge and skills requisite to specific domains of practice within the profession (Fundraising, Constituent and Alumni Relations, Marketing and Communications, Public Affairs and Government Relations, Management, Advancement Services)

- **Relationship Building**
Effectively utilizing interpersonal skills to build and maintain strong professional relationships between the organization and internal and external stakeholders (Effectively engage volunteers and stakeholders, consensus building, collaboration and teamwork, stewardship, negotiation, conflict resolution, proactive relationship development)
- **Emotional Intelligence**
Recognizing emotions and understanding how they impact you and others to guide thinking and behavior (Active listening, self-awareness, empathy, social awareness, social skill)
- **Strategic Thinking**
Employs methods and processes to view a situation, assess factors, and create effective implementation plans with measurable results (Align strategy with action, critical thinking, innovative problem solving, change management, adaptability to complexity, strategic planning, understanding data and context, strategic stakeholder engagement)
- **Leadership**
Leading with vision and credibility, to effectively manage self, others and resources to achieve organizational impact. The ability to define what the future should look like, align people with that vision, and influence others through authenticity and inspiration to make the vision happen despite obstacles. (Entrepreneurial, models' engagement in advancement, manages ambiguity, future focused, executive presence, perseverance, courageous communicator, continuous learning)

Session Description* Max 200 words

Please write a concise description that generates excitement and provides important facts about the session content.

Conference attendees will come from all advancement professions and school sizes, so we encourage a wide range of session topics, from strategic “big picture” to practical “how-to.”

NOTE: If your proposal is selected and the Conference Program Committee requires no modifications, **this description will be used for promotional purposes** (CASE reserves the right to shorten and/or revise descriptions as necessary).

Content Tags Max 20 words

List additional keywords that will help better identify the main content of your proposed session (e.g., marketing, communications, branding, alumni, reunions, stewardship events, annual giving, crisis communications, digital engagement, etc.). At least three keywords is recommended.

Please identify your audio/visual needs for your presentation: Max 20 words

I have a preferred date/time to present, if my proposal is selected (preferred presentation times will be taken into consideration but cannot be guaranteed): Max 20 words

Learning Objectives

Provide 3-5 takeaways or outcomes that are clear, measurable, and achievable.

Complete the sentence, 'Upon completion, participant will be able to....' Use action words to begin this learning objective, such as list, describe, define, demonstrate, conduct, etc.

Learning Objective 1*

Learning Objective 2*

Learning Objective 3*

Learning Objective 4

Learning Objective 5

Diversity, Equity, Inclusion and Belonging

How will this proposed session address issues around diversity, equity, inclusion, and belonging? *

If your proposed session does not explicitly address diversity, equity, inclusion, and belonging, indicate as N/A:

Session Presenters

Below are the required fields to submit for each presenter.

Full Name:

Daytime Phone:

Email:

Job Title:

Name of Institution:

Biography (Maximum 100 words):

Emergency Contact Name: _____

Emergency Contact Number: _____

Headshot:

Please upload a digital image (a high-resolution, professionally produced portrait, if possible) for use in marketing materials.

Policies and Rules for Submission

Please read the policies and rules for submission in their entirety. Then, sign your name in agreement.

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Rules for Participation

- Submission of a proposal does not guarantee participation in the 2023 CASE District VII Annual Conference.
- Submission of a proposal confirms the speaker(s) is available to present on any day during the conference dates (Mar 19-21, 2023)
- All presenters/speakers are responsible for their travel, transportation, lodging, and meal costs.
- Individuals must complete the submission process in its entirety. Incomplete submissions will not be accepted.
- By submitting a proposal, you are agreeing to:
 - Deliver presentation(s) at dates and times assigned;
 - Devote such time, skill, energy, and experience to develop and deliver a professional quality program;
 - Warrant full permission to use any or all works of third parties contained in the materials submitted for presentation;
 - Indemnify and hold harmless CASE against any or all claims, losses, or damages;
 - Grant CASE permission to record, edit, transcribe, archive, and distribute any written or visual material submitted in connection with this program. Participants must grant permission to be considered for participation;
 - Grant permission to be photographed or digitally captured;
 - Consent to receive no monetary compensation for the performance of duties or obligations;
 - Acknowledge ownership, power, and authority to enter into said agreement;
 - Acknowledge that audio/visual needs provided by the conference will include a podium, microphone, Wi-Fi connection, screen and projection equipment. Presenters are required to bring their own laptops and laptop connections. No additional AV requests will be accommodated.
- If the submission is selected, CASE reserves the right to revise the proposal submission for promotional materials associated with conference.
- If the submission is selected, information regarding important deadlines and requirements will be provided and must be adhered to.

- Presenters may be District VII members with related expertise. Outside organizations/businesses must pair with members from District VII institutions to present.
- Presenters will be required to upload presentations to the Speaker Management System (Cadmium) prior to the conference.

Questions?

Please contact Chelsea Foster at cfoster@case.org.