



## Required Call for Presentations

NACVA and the CTI's 2016 Annual Consultants' Conference  
June 8–11, 2016 • The Hotel Del Coronado • San Diego, CA

### SUBMISSION DEADLINE FOR PROPOSALS: Friday, October 23, 2015

**We suggest you save it to your computer first to fill out and submit (do not use Chrome browser).** Complete all sections below and use the submit button above to send the form. **Please save a copy of the completed form for your records and in case there is any issue with the submittal.** If you have any issues sending the Call for Presentations form via the submit button, contact Diana Ridgeway at [DianaR1@NACVA.com](mailto:DianaR1@NACVA.com) or (800) 677-2009. **Submission made in any other manner than via the fillable PDF will not be accepted.** Submission of the Call for Presentation form is not a confirmation of presentation.

**Only completed session call for presentations will be considered** for the 2016 Conference Agenda. Incomplete summaries will *not* be accepted. Conference sessions will be scheduled in 50- or 100-minute increments. Direct all questions or concerns to Diana Ridgeway by e-mail at [DianaR1@NACVA.com](mailto:DianaR1@NACVA.com). Acceptance and/or rejections will be confirmed by e-mail by the end of December 2015.

**Note:** The 2016 Conference will be using “green initiatives” to reduce the volume of paper handouts. Sessions confirmed for the Conference agenda will require presenters to prepare not only a detailed presentation outline, but also PowerPoint (PPT) presentations as well as take-aways (deliverables that session attendees can immediately implement in their practice). *“How-to-Do-It” sessions with exercises, examples, and case studies are highly encouraged.* Presenters confirmed may also be scheduled to participate in Q&A discussions related to their Conference presentation at the Conference. They will be asked to submit an article for consideration to be published in a special edition of *The Value Examiner* or *QuickRead Buzz Blog* based on their presentation and to present a live webinar based on their session during the summer of 2016.

If your presentation is selected by our Conference Planning Committee, materials **must** be e-mailed in electronic Word or PPT format to Diana Ridgeway ([DianaR1@NACVA.com](mailto:DianaR1@NACVA.com)) no later than Friday, April 22, 2016.

Those selected to present will receive (see page six [6]for information regarding co-presenters):

- Round-trip, coach-class airfare to be booked by NACVA/CTI Travel Services
- One night's hotel lodging (room and tax only) for night prior to session—all other nights at own expense
- One complimentary Conference registration
- Reimbursement of ground transportation between the Conference hotel and airport

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**Provide your information exactly how you'd like it listed in the Conference marketing if selected.**

Presenter First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Designations: \_\_\_\_\_

Name of Company, Firm, Organization: \_\_\_\_\_

Street/Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Tel: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_ Cell: \_\_\_\_\_

*(Held in strict confidence and used for emergency purposes only)*

NACVA's Certified Valuation Analyst® (CVA®) is the only valuation credential accredited by the  
National Commission for Certifying Agencies® (NCCA®), the accreditation body of the Institute for Credentialing Excellence™ (ICE™).



## I. PRESENTER/SPEAKER BIO

Provide a 75- to 100-word narrative bio below. NACVA/CTI also requires a high resolution (300 dpi), electronic photo (color or black and white) that will be used in marketing materials (jpeg or tiff preferred). E-mail the photo to Diana Ridgeway at [DianaR1@NACVA.com](mailto:DianaR1@NACVA.com) with your session proposal submission.

If there is a co-presenter, please provide all information regarding the presenter on page six (6) of this form.

## II. PROPOSED PRESENTATION TITLE

## III. ARTICLE REQUEST

### **NACVA's *The Value Examiner*, *QuickRead*, and IBA's *Business Appraisal Practice***

Indicate whether you give NACVA/CTI permission to share your proposal with the editors of these publications. The editors will evaluate whether your proposed presentation (whether or not it is selected for the 2016 Conference) would be an appropriate topic for the publications, in which case the editor(s) will contact you to discuss writing an article based on your presentation proposal for an upcoming and/or future issue.

☐ Yes, I grant permission

☐ No, I do not grant permission

## IV. LIVE, ONLINE, WEBINAR DISCLOSURE

We are planning to broadcast all Conference sessions, both live and online for attendees. Each session will also be recorded for placement in NACVA/CTI's CPE On-Demand portal for which the presenter would be paid royalties. If your session is selected, we will request permission to do so in the presenter agreement.

In addition, we may ask you to present your session as a live webinar. You will be compensated for the webinar, both for the live presentation and any royalties if the recorded webinar is sold in NACVA/CTI's CPE On-Demand portal. The webinar would be a repeat of your Conference presentation if selected or a presentation on the topic you submitted, coordinated, and scheduled with our webinar administrator, Kelli Eyres

☐ Yes, I would be interested in doing a webinar

☐ No, I am not interested

## V. PRESENTATION DESCRIPTION

Please provide a 50- to 75-word narrative description below.

## VI. LEARNING OBJECTIVES

Clearly describe what the attendees/participants will *be able to do after* this presentation. Learning objectives should be bullets that are written clearly and focus on the specific information, skills, or ability participants will be able to demonstrate after they have attended your session.

*Sample:*

After completing the session, participants will be able to:

- Identify
- List
- Differentiate between
- Define

(See Page 7 for **Useful Tips for Writing Learning Objectives**)

## VII. WHO SHOULD ATTEND

List who should attend this Presentation/Webinar—your target audience [CEOs, CPAs, attorneys, practitioners, etc.].

## VIII. SESSION TRACKS

The 2016 Annual Conference could include the following session tracks. Please indicate to which track(s) you wish to submit your Session Proposal. Select all that apply. (Refer to Section IX for the Program Level and Prerequisites for your session.)

- |  |   |
|--|---|
| <input type="checkbox"/> Exit Planning                       | <input type="checkbox"/> Matrimonial Consulting   |
| <input type="checkbox"/> Expert Witnessing                   | <input type="checkbox"/> Mergers and Acquisitions |
| <input type="checkbox"/> Financial Reporting                 | <input type="checkbox"/> Practice Management      |
| <input type="checkbox"/> Forensic Accounting                 | <input type="checkbox"/> Standards and Ethics     |
| <input type="checkbox"/> Healthcare Valuation and Consulting | <input type="checkbox"/> Valuation Symposium      |
| <input type="checkbox"/> Litigation Consulting               | <input type="checkbox"/> Academic                 |

## IX. PROGRAM LEVEL AND PREREQUISITES

Please indicate the **Program Level and Prerequisites** required to meet the desired Learning Objectives. The National Association of State Boards of Accountancy (NASBA) requires a reporting of Program Level, Prerequisites, and Fields of Study. The following questions apply to your presentation:

Program Level	<input type="checkbox"/> <b>Update</b> — Learning activity level that provides a general review of new developments.  <b>Prerequisite:</b> Participants need a background in the subject area and desire to keep current.	<input type="checkbox"/> <b>Overview</b> — Learning activity level that provides a general review of a subject area from a broad perspective.  <b>Prerequisite:</b> None required. These overview programs may be appropriate for professionals at all organizational levels.	<input type="checkbox"/> <b>Basic</b> — Learning activity level most beneficial to individuals new to a skill or an attribute.  <b>Prerequisite:</b> Previous training or experience with the fundamentals of subject matter being taught. These individuals are often at the staff or entry level in organizations, although such programs may also benefit a seasoned professional with limited exposure to the area.	<input type="checkbox"/> <b>Intermediate</b> — Learning activity level that builds on a basic program most appropriate for individuals with detailed knowledge in an area.  <b>Prerequisite:</b> Previous training or research on subject matter being taught. Such persons are often at a mid-level within the organization, with operational and/or supervisory responsibilities.	<input type="checkbox"/> <b>Advanced</b> — Learning activity level most useful for individuals with mastery of the particular topic. This level focuses on the development of in-depth knowledge, a variety of skills, or a broader range of applications.  <b>Prerequisite:</b> Good knowledge of topic and experience in the field. Advanced level programs are often appropriate for seasoned professionals within organizations; however, they may also be beneficial for other professionals with specialized knowledge in a subject area.
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Please provide additional prerequisites (education, experience, etc.), and/or advance preparation necessary (pre-read, exam, etc.), if applicable:



## X. APPLICABLE NUMBER OF CPE CREDITS AND FIELDS OF STUDY

Please provide the length of time needed for this presentation as well as the number of CPE credits: (50 minutes = 1 hour CPE credit). Select all that apply.

☐ 50 mins/1 hr CPE credit      ☐ 100 mins/2 hrs CPE credit

CPE fields of study are broken down into 23 subject areas. The National Association of State Boards of Accountancy (NASBA) requires a reporting of each subject area as it relates to each presentation/session offering. Please allocate the **amount of time** your program is dedicated to each subject area below. **CPE cannot be divided into partial hours.** You can select as many fields of study that are appropriate to your session based on the number of CPE credits needed for your session. For example: A 50-minute session can have one CPE credit; thus you could select one field of study.

### CPE FIELDS OF STUDY KEY

AC	=	Accounting	_____
ACG	=	Accounting—Governmental	_____
AD	=	Auditing	_____
ADG	=	Auditing—Governmental	_____
AP	=	Administrative Practice (Consulting)	_____
SEB	=	Social Environment of Business	_____
RE	=	Regulatory Ethics	_____
BL	=	Business Law	_____
BM&O	=	Business Management & Organization	_____
FN	=	Finance	_____
MAS	=	Management Advisory Services	_____
MK	=	Marketing	_____
BE	=	Behavioral Ethics	_____
CM	=	Communications	_____
PHR	=	Personnel/HR	_____
PD	=	Personal Development	_____
CS	=	Computer Science	_____
EC	=	Economics	_____
MM	=	Mathematics	_____
PRD	=	Production	_____
SK&A	=	Specialized Knowledge & Applications	_____
ST	=	Statistics	_____
TX	=	Taxes	_____
<b>Total CPE (must equal length of session selected above)</b>			_____



## **XI. CO-PRESENTER INFORMATION (IF APPLICABLE)**

The inclusion of a co-presenter does *not* guarantee that NACVA/CTI will be able to provide the same benefits for the co-presenter as outlined on page one for presenters. It will be determined on a case-by-case basis.

*Provide your information exactly how you'd like it listed in the Conference marketing if selected.*

Co-Presenter First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

Designations: \_\_\_\_\_

Name of Company, Firm, Organization: \_\_\_\_\_

Street/Mailing Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Tel: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_ Cell: \_\_\_\_\_

*(Held in strict confidence and used for emergency purposes only.)*

### **Co-Presenter/Speaker Bio:**

Please provide a 75- to 100-word narrative bio below. NACVA/CTI also requires a high resolution (300 dpi), electronic photo (color or black and white) that will be used in marketing materials (jpeg or tiff preferred). Please e-mail the photo to Diana Ridgeway at [DianaR1@NACVA.com](mailto:DianaR1@NACVA.com) with your RFP submission.

**Thank you for completing this Presentation Summary!** The Education Department and NACVA/CTI's Annual Conference Committee sincerely appreciate your time in contributing to our efforts to market this presentation and provide participants with a clear understanding of what your presentation has to offer.



## Useful Tips for Writing Learning Objectives

Generally, learning objectives are written in terms of learning outcomes. What do you want your attendees to be able to do as a result of the session? Keep in mind that it must be an *observable* action. Words like “understand” or “comprehend” are not *observable* and, therefore, should not be used to write a learning objective.

Follow the three-step process below for creating learning objectives.

1. Create a stem:

After completing the session, attendees will be able to...

2. After you create the stem, add an action verb:

Analyze, recognize, compose, produce, list, etc. (See below for a list of approved action verbs.)

3. Once you have a **stem** and a **verb**, determine the actual *observable* outcome:

*Example:* “After completing the session, attendees will be able to list the five main causes of fraud.”

Analyze	Estimate	Practice
Apply	Evaluate	Predict
Appraise	Explain	Prepare
Arrange	Experiment	Prescribe
Assemble	Express	Produce
Assess	Formulate	Propose
Associate	Generalize	Quote
Calculate	Grade	Rank
Choose	Identify	Rate
Cite	Illustrate	Recognize
Classify	Indicate	Recommend
Collect	Infer	Relate
Compose	Inspect	Report
Construct	Integrate	Restate
Count	Interpolate	Revise
Create	Interpret	Select
Critique	Inventory	Separate
Debate	Judge	Score
Define	List	Solve
Demonstrate	Locate	Specify
Describe	Manage	State
Design	Measure	Summarize
Detect	Name	Test
Determine	Operate	Translate
Diagram	Order	Use
Differentiate	Organize	Utilize
Distinguish	Plan	
Employ	Point	