



REQUIRED SESSION REQUEST FOR PROPOSAL (RFP)

2012 Annual Consultants' Conference June 20–23, 2012 • *Omni Dallas Hotel* • Dallas, TX

SUBMISSION DEADLINE: FRIDAY—October 14, 2011. Complete all sections below and use the submit button above to send the form electronically. Please save a copy of this form for your records. If you have any issues sending the RFP via the submit button, you can email it to Kelly O'Keefe at KellyO1@NACVA.com Submission of the RFP is not a confirmation of presentation.

ONLY COMPLETED SESSION RFPs WILL BE CONSIDERED for 2012 Conference Agenda. Incomplete summaries will not be accepted. Conference sessions will be scheduled in 50 or 100 minute increments. Please direct all questions or concerns to Kelly O'Keefe at: **(800) 677-2009** or to: KellyO1@NACVA.com. Acceptance and/or rejections will be confirmed by e-mail by the end of December 2011.

Note: The 2012 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 presentations as well as take-a-ways (deliverables that session attendees can immediately implement in their practice). "How-to-Do-It" sessions with exercises, examples, and case studies are highly encouraged.

If your presentation is selected, all materials **must** be emailed in electronic word or PPT format to Kelly O'Keefe (KellyO1@NACVA.com) no later than May 14, 2012.

All presenters will receive:

- Round trip, coach class airfare to be booked by CTI Travel Services
- One night's hotel lodging (room and tax only) for night prior to session
- One Complimentary Conference Registration
- Reimbursement of ground transportation



Presenter First Name: _____ Last Name: _____

Designations currently held: _____

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)

I. **Presenter/Speaker Bio:**

Please provide a 75 to 100 word narrative bio below. CTI also requires a high resolution (300 dpi), electronic photo (black and white or color) that will be used in marketing materials (jpeg or tiff preferred). Please e-mail the photo to Kelly O'Keefe at: KellyO1@NACVA.com.

II. Proposed Presentation Title:

NACVA's *Value Examiner Magazine* and IBA's *Business Appraisal Practice*

Please indicate whether you will give CTI permission to share your proposal with editors of *The Value Examiner* and *Business Appraisal Practice* magazines. The editors will evaluate whether your proposed presentation (whether or not it is selected for the 2012 conference) would be an appropriate topic for the magazines, in which case the editor(s) would 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

III. Presentation Description:

Please provide a 50 to 75 word narrative description below.

IV. 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

- 1) Articulate
- 2) Identify
- 3) List
- 4) Differentiate between
- 5) Define

(See last page **Useful Tips for Writing Learning Objectives**).

V. List who should attend this Presentation/Webinar—your target audience [CEOs, CPAs, Attorneys, Practitioners, etc.].

VI. The 2012 Annual Conference will include the following session tracks. Please indicate the tracks you would like your Session RFP considered. Select all that apply. (Refer to Section VIII (page 3) for the Program Levels per track.)

- | | |
|--|---|
| <input type="checkbox"/> Financial Reporting | <input type="checkbox"/> Matrimonial Consulting |
| <input type="checkbox"/> Forensic Accounting | <input type="checkbox"/> Mergers & Acquisitions |
| <input type="checkbox"/> Healthcare Consulting | <input type="checkbox"/> Practice Management |
| <input type="checkbox"/> International Valuation | <input type="checkbox"/> Valuation Symposium |
| <input type="checkbox"/> Litigation Consulting | |

VII. Please provide the number of CPE credits applicable to this Presentation: [50 minutes = 1 hour CPE credit] Select all that apply

- 50 mins/1 hr 100 mins/2 hrs

VIII. Please indicate [with a checkmark] the **Program Level and Prerequisites** required to meet the desired Learning Objectives: The National State Board 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"/> Update— Learning activity level that provides a general review of new developments. Prerequisite Participants need a background in the subject area and who desire to keep current. Session Tracks Consulting Services Forensic Accounting IBA Symposium International Valuation Litigation Consulting Mainstream Valuation Practice Management | <input type="checkbox"/> Overview— Learning activity level that provides a general review of a subject area from a broad perspective. Prerequisite: None required. These overview programs may be appropriate for professionals at all organizational levels. Session Tracks Consulting Services Forensic Accounting IBA Symposium International Valuation Litigation Consulting Mainstream Valuation Practice Management | <input type="checkbox"/> Basic— Learning activity level most beneficial to individuals new to a skill or an attribute. Prerequisite: Previous training or experience with the fundamentals of accounting, finance, economics, and business writing. 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. Session Tracks IBA Symposium Practice Management | <input type="checkbox"/> Intermediate— Learning activity level that builds on a basic program most appropriate for individuals with detailed knowledge in an area. Prerequisite: 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. Session Tracks Consulting Services Forensic Accounting IBA Symposium International Valuation Litigation Consulting Mainstream Valuation | <input type="checkbox"/> Advanced— 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. Prerequisite: 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. Session Tracks Academic Research IBA Symposium Progressive Valuation |
|---------------|--|---|--|--|--|
|---------------|--|---|--|--|--|

Please provide additional prerequisites (education, experience, etc.), and/or advance preparation necessary (pre-read, exam, etc.), if applicable:

VIII. Please provide the specific “Fields of Study” that apply to this Presentation:

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 all fields of study that are appropriate to your session.

CPE FIELDS OF STUDY KEY:

| | | | |
|------|---|--------------------------------------|-------|
| AC | = | Accounting | _____ |
| ACG | = | Accounting—Governmental | _____ |
| AD | = | Auditing | _____ |
| ADG | = | Auditing—Governmental | _____ |
| AP | = | Administrative Practice | _____ |
| 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 | _____ |

Thank you for completing this Presentation Summary—the Education Department and CTI’s Annual Conference Planning Committee sincerely appreciate your time in contributing to the efforts of CTI’s ability to market this Presentation and provide the participants with a clear understanding of what this program has to offer.

Thank you!

Useful Tips for Writing Learning Objectives

Generally, learning objectives are written in terms of learning outcomes: What do you want your participants to be able to do as a result of the session?

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

1. Create a stem.

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

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

Analyze, recognize, compare, provide, list, etc. For a list of action verbs see below.

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

EXAMPLE: "After completing the session, participants will be able to list the five main causes of fraud."

| SAMPLE ACTION VERBS | | | | | | | |
|---------------------|------------|-------------|-------------|---------------|-------------|-------------|-------------|
| Abstract | Assist | Cite | Conduct | Demonstrate | Draw | Extrapolate | Interpret |
| Activate | Associate | Classify | Construct | Describe | Dramatize | Formulate | Introduce |
| Acquire | Breakdown | Collect | Convert | Design | Employ | Generalize | Investigate |
| Adjust | Build | Combine | Coordinate | Detect | Establish | Identify | Judge |
| Analyze | Calculate | Compare | Count | Develop | Estimate | Illustrate | Limit |
| Appraise | Carry out | Compute | Criticize | Differentiate | Evaluate | Implement | List |
| Arrange | Catalog | Contrast | Critique | Direct | Examine | Improve | Locate |
| Articulate | Categorize | Complete | Debate | Discuss | Explain | Increase | Maintain |
| Assemble | Change | Compose | Decrease | Discover | Explore | Infer | Manage |
| Assess | Check | Compute | Define | Distinguish | Express | Integrate | Modify |
| Name | Prescribe | Reconstruct | Replace | Select | Structure | Train | |
| Observe | Produce | Record | Report | Separate | Summarize | Transfer | |
| Operate | Propose | Recruit | Reproduce | Sequence | Supervise | Translate | |
| Order | Question | Reduce | Research | Sing | Survey | Update | |
| Organize | Rank | Reflect | Restate | Sketch | Systematize | Use | |
| Perform | Rate | Relate | Restructure | Simplify | Tabulate | Utilize | |
| Plan | Read | Remove | Revise | Skim | Test | Verbalize | |
| Point | Recall | Reorganize | Rewrite | Solve | Theorize | Verify | |
| Predict | Recommend | Repair | Schedule | Specify | Trace | Visualize | |
| Prepare | Recognize | Repeat | Score | State | Track | Write | |