



## 2020 Call for Sessions Guidelines

2020 National Conference  
October 6-8, 2020  
Hilton Anaheim

### 2020 National Conference

Exponent Philanthropy's biennial National Conference is the largest gathering of foundations, families, and individuals who give with few or no staff. Our national conferences have a strong reputation for engaging the head and heart, providing meaningful opportunities to connect and learn collaboratively, and radiating a welcoming culture that makes everyone feel part of a supportive community.

The 2020 National Conference is designed to:

- Inform and inspire through first-rate content.
- Celebrate and champion the outsized impact of our vibrant community.
- Foster personal and professional connections among colleagues, advisors, and field leaders.

Educational content spans the philanthropic landscape and is delivered through provocative keynote talks, interactive sessions, site visits, and informal idea exchanges. Sessions are designed to address the specific challenges and opportunities of funders with few or no staff by building and strengthening core skills, examining advanced topics, and exploring trends. The conference also offers multiple opportunities for participants to connect with each other and build relationships that last beyond the conference experience.

A portion of the 2020 National Conference will be designed by you, Exponent Philanthropy members and constituents, and we invite you to submit your session ideas.

### Session Details

- **Audience:** We expect attendance of 900 individuals, including donors, trustees, and staff from all types of foundations; individual donors and philanthropic families; donor advised fund holders and managers; philanthropic support organizations; philanthropic service professionals; and thought leaders in the field of philanthropy.
- **Session numbers:** We are soliciting proposals for our breakout sessions which typically see audience numbers of 35-50 participants on the lower end and 75-90 on the higher end.
- **Session length:** Sessions will be 60-, 75-, or 90-minutes long. Exponent Philanthropy will confirm your session's length in the spring of 2020.
- **Session set-up:** Given the size of session rooms at the Hilton Anaheim, we cannot guarantee that we can accommodate sessions set in roundtables. Rooms will likely be set in theater style.

### Submission Requirements

1. **Who:** This call for sessions is open to all constituents, including member and non-member funders, partners, sponsors, and colleague organizations.
2. **How many:** Organizations or individuals may submit a maximum of two proposals. All proposals submitted by different individuals from the same organization count toward the limit.



3. **Deadline:** There are no deadline extensions; late submissions cannot be accepted.
4. **Designer ownership:** There are no session designer *transfers*; that is, the person who submits the session **must be** the person who works with Exponent Philanthropy staff all through the seven-month session design process. If the designer transfers or delegates the work, Exponent Philanthropy reserves the right to disqualify the session.

## Evaluation Criteria

The call for sessions is open to any philanthropy topic that addresses the needs and strengths of lean funders, Exponent Philanthropy's core audience. Specifically, the session you propose should do one of the following:

1. Improve an existing practice or mindset
2. Explore a new or emerging practice or mindset
3. Offer a unique perspective on a trend in philanthropy

Exponent Philanthropy's Programs & Services Committee and additional ad hoc members, along with key staff, will review all submissions and select those that are most relevant to this audience and meet the above criteria. The committee will review all session proposals *name blind*, that is, solely on the strength of the proposal in meeting the criteria.

The committee will give preference to sessions that do one or more of the following:

1. Provide an interactive, action-oriented environment for learning
2. Showcase diverse voices and perspectives
3. Feature content that has a universal message and is not simply "show & tell" of one foundation's practice.

Sessions should be focused and realistic in scope and have the potential to offer tangible educational value in a 60- to 90-minute time frame.

## Expectations for Session Designers

Proposal submitters are asked to keep the conference dates available until notified of the status of their proposal. Session designers who do not adhere to the below expectations may have their sessions removed from the conference program at the discretion of Exponent Philanthropy staff.

If selected to design a session, designers must agree to:

- Work in partnership with a session coach, who is an Exponent Philanthropy staff member, to design and execute the session. This means being willing and open to adapt the session to fit the time slot, tailor the design to meet Exponent Philanthropy criteria, and include expert speakers if applicable.
- Participate in a webinar training in February to review the deadlines and key steps in the process.
- Complete all session planning tasks and meet all deadlines.
- Participate in the summertime *speaker* webinar, if speaking.
- Incur all expenses related to the development and implementation of their sessions. Exponent Philanthropy does not pay honoraria, travel, per diem, or other costs for session speakers or designers.
- Be present at the conference and serve as a point person in the session (if not speaking) by introducing the session and assisting with technology and handout distribution.



- Comply with Exponent Philanthropy’s Non-Solicitation Policy: All Exponent Philanthropy programs are non-solicitation environments and shall not be used for commercial sales pitches, self-promotion, or unwarranted criticism of a competitor. Exponent Philanthropy reserves the right to take action as necessary to address violations of this policy.

### Session Planning Key Dates & Deadlines

September 19	Call for Sessions opens
November 1	Call for Sessions closes
February 2020	Proposal submitters notified of decisions
March 13	Session titles, descriptions, and learning objectives due to Exponent Philanthropy
June 5	Speakers & speaker information due to Exponent Philanthropy
August 14	Final session materials due to Exponent Philanthropy: session plans, presentations, handouts & resources, AV & room set requests
October 6-8	2020 National Conference

### Review These Proposal Components Before Submitting Your Session

Please tell us about your session idea. What you submit here should reflect your current vision for the session – topic, title, description, speakers, and format. We do not expect that all of these components are set in stone at this time, and we anticipate that once planning gets underway, there may be adjustments to what you outline below. *Exponent Philanthropy reserves the right to edit final titles and descriptions.*

- Name
- Organization
- Email Address
- Session Working Title

**Session Description** In 150 words or less, explain the theme of your session, outline the major components, activities, and/or teaching points, and summarize what participants will be able to apply to their philanthropic work following the session.

**Specific Relevance to Lean Funders** In 75 words or less, explain here how your session meets the needs of and/or features lean funders.

#### Session Level

- 101 Fundamentals—Assumes participants have limited or no prior knowledge of or experience with the subject.
- 201 Application—Focused on building on or enhancing participants’ existing knowledge of a subject through analysis, practice implementation, and/or deeper learning
- 301 Thought Leadership—Engages participants’ experience/expertise in strategic, innovative, and/or complex subjects

#### Proposed Presenters/Speakers (check all that apply)

- Myself
- Funder
- Nonprofit/Grantee
- Financial/Legal Professional
- Consultant
- Other: \_\_\_\_\_



**Likely Session Formats** (check all that apply)

- Presentation
- Moderated panel (max. # panelists 4)
- Group discussion
- Conversations in pairs or triads
- Worksheet or exercise
- Case example & discussion
- Other: \_\_\_\_\_

**This material has been presented elsewhere:**

- No
- Yes

If yes, when: \_\_\_\_\_

Where: \_\_\_\_\_

**Additional Comments:** Is there anything else you'd like us to know about your proposal? (50 words maximum)

**We may receive more than one proposal on a particular topic. Would you be willing to collaborate with other submitters who proposed similar ideas? Y / N**

**By submitting this proposal, I confirm that I've read the terms of session submission. Y / N**

//

Thank you for submitting a session proposal! We will notify all those who've submitting sessions with decisions by February 2020.

Please contact Director of Educational Programs Lauren Kotkin if you have any questions. [lauren@exponentphilanthropy.org](mailto:lauren@exponentphilanthropy.org) or 202-580-6560

Thank you for your interest!

Exponent Philanthropy  
Programs & Services Department