

A variety of proposals for speaking assignments

ID # 1	
CLIENT CHOSE OPTION(S):	1
TAGS / KEYWORDS:	Public speaking, facilitation, offsite meeting, non-profit

Situation

The CLIENT's quarterly CEO meeting is looking for business topics to help member organizations run better, faster, and stronger in achieving their mission.

Objectives

Participants will leave with specific techniques and information that will enable them to run their businesses more effectively.

Value

Your attendees will leave inspired, with ideas they can use to produce concrete results that give them great value further deepening the value of their CLIENT membership.

Topics

Here are some suggested topics. These could be delivered as pure presentation, or as a mix of presentation and interactive workshop. These topics bridge the most effective for-profit business thinking to helping non-profit managers bring that thinking to their organizations. They bring together mission/passion-driven issues with analysis/ business-driven principles.

- [TOPIC 1]
- [TOPIC 2]
- [TOPIC 3]
- [TOPIC 4]

- [TOPIC 5]
- [TOPIC 6]
- [TOPIC 7]

Methodologies and Options

Option 1

A presentation/workshop covering the topics as described above or a possible topic not listed if you find one you like from my web site.

Option 2

A presentation/workshop covering the topics most important to your attendees. I would interview up to 5 of your members to understand their most pressing issues and design a topic that addresses what's most important based on the conversations. I would also deliver a summary of my learnings (by phone meeting plus handouts) for your own use in targeting future quarterly meetings to the needs of your members.

Option 3

Everything included in options 1 and 2, plus helping you strategize how best to bring the needs of your members into your curriculum design going forward, providing a long-term coherent curriculum strategy that meets the needs of your constituents. To the extent possible, this option would also include recommendations for other speakers, books, resources, etc.

Timing

The conference itself will be in [CITY], November 1, 2006. Additional work in options 2 and 3 will be times as necessary around that date.

Joint Accountabilities

Consultant will sign all needed non-disclosures. We will inform each other immediately of any unforeseen changes or developments that would impact this project so we can adjust accordingly.

Confidentiality

As needed.

Terms and Conditions

The fees for the proposal are: option #1: \$10,000, option #2: \$13,000, option #3: \$25,000.

Conditions

One half of the fee is due upon acceptance of this proposal to hold the date, with the remainder due after 90 days. As a professional courtesy, I offer a 10% discount for payment in full by the start of the contract.

Expenses

Expenses will be billed monthly, as accrued. Expenses will include reasonable travel expenses including plane, train, taxi, and lodging. When possible, we will request that you book air fares and hotels. We don't bill for fax, courier, administrative work, telephone, duplication, or related office expenses.

Conditions

The quality of work is guaranteed. We'll do what it takes to achieve the objectives. Once accepted, this offer is non-cancelable for any reason, and payments are to be made at the times specified. However, you may reschedule, postpone, or delay this project as your business needs may unexpectedly dictate without penalty and without time limit, subject only to mutually agreeable time frames in the future.

Acceptance

The signatures below indicate acceptance of the details, terms, and conditions in this proposal, and provide approval to begin work as specified. You can fax them to +1 (800) 555-5555. Alternatively, your deposit indicates full acceptance and also will signify approval to begin.

For Consultant:

For client:

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|-------------------------|-------------------------------------------------------------------------------|
| ID # 33                 |                                                                               |
| CLIENT CHOSE OPTION(S): | 2                                                                             |
| TAGS / KEYWORDS:        | Large conference plenary presentation;<br>On-site conference video production |

**Situational Summary**

The XYZ Program for Excellence is growing extraordinarily fast, as is the size of the annual conference – literally doubling in attendance from 1,800 in 2004 to an expected 3,500-4,000 this October.

This year’s ABC Prize winners will be the researchers who carried out the foundational effort, and the group that funded the original research. A special event is desired to honor these original contributors, and highlight the history of the program which has been creating communities of excellence over a 20+ years. The event should capture the history, feature the key personalities, engage 3,500+ conference attendees, and most of all reflect and amplify the heart and soul of this special work.

**Objectives**

From our discussion, create a plenary event the last day of the conference that:

- Creates a platform for people from a wide variety of important backgrounds, to share their story in an integrated way, providing an emotional connection to the XYZ program that generates enthusiasm, and the thirst for continued success.
- Reaffirms the XYZ path to achieving superior performance and delivery of care, inspiring those who have not yet applied to join, those who are mid-journey to persist in their transformation, and those who have achieved recognition to dispel complacency and continue the pursuit of excellence.
- Brings everyone together, celebrating the history of XYZ’s rapidly evolving success, from the origins to the present day.

**Measures of Success**

From our discussion, the event will:

- Reveal the heart of the program, the spirit which is the source of excellence.
- Uniquely showcase the history from roots to the present day.
- Kick off the last day of the conference, building the *esprit de corps* among all who are present.
- Generate enthusiasm and pride for belonging to the XYZ community.
- Inspire and share the fundamental insights which have made the program the incredible and undeniable success it is today.

### **Value to the Organization**

From our discussion, this event will:

- Uniquely capture the history of the program, including live interaction with those who remain from the original team.
- Speak to *all who attend*, inspiring those who have not yet applied, to apply; those in the midst of their transformational journey, to continue full speed ahead; and, those who have received recognition, to continue in their pursuit of excellence.
- Create a valuable marketing tool. The recording of this event will highlight as no other promotional material has, how the program started, why it is important, and the powerful, transformational movement it has become.

### **Options**

#### **Option 1: The XYZ Prize Winners' Panel**

Working under John Smith's guidance (and anyone else designated), I will:

- Interview the key players in the history of XYZ's program, both those who will appear on stage and additional people who have unique stories and value to add.
- Design and host the presentation, bringing together original contributors with those who are on the growing edge of implementation.
- Document historic aspects, to ensure they are recorded and available to support the growth and success of future generations.

- Create a session which engages, entertains, and makes explicit the dramatic growth and contribution of the program since its inception.
- The single deliverable of Option 1 is the event itself, which will take place as scheduled in the program. There will be no additional sessions or written materials provided by me.

### **Option 2: Capture the Magic of the Conference through a Video**

In addition to Option 1 above, I will:

- Participate in both the pre-conference and the conference, seeking out and interviewing people at all stages of the XYZ process (pre-application, implementation, and recipients) and other notable and recognized contributors.
- Work under the guidance of XYZ staff and collaboratively with a professional videographer, leading the creative production of a 2-3 minute video which captures the conference ethos and contributes to historic documentation.
- Integrate the video as part of the plenary session, giving participants a chance to re-experience the magic of the entire conference in a condensed timeframe.
- The resultant video would become the sole property of XYZ for future marketing product development, or any other purpose XYZ desires. XYZ grants me the right to use the video for personal marketing purposes.

### **Option 3: Amplify the Power of the Conference through a Transformational Workshop.**

To increase the quality of participant interaction during the conference, I will design and deliver a workshop drawing on lessons I learn through my interviews leading up to the conference. The workshop may be called, [TOPIC].

My presentation and hand-outs will provide extensive tips, techniques, and tactics gleaned from history and the masters. It will also engage participants using the power of storytelling, enabling them to identify and share their personal reference points for raising the bar on performance and leadership excellence. People will be encouraged to share their stories with others outside the workshop during the conference.

## **Timing**

Option 1 requires the telephone interviews begin as soon as possible, and the scheduling of several briefings with John Smith (and any other staff to be designated) to brief them on what I am learning and the development of the session. This option requires that I arrive on site the day before my presentation and stay through the completion of the session.

Option 2 requires the selection of a professional videographer with whom I will collaborate with during the conference. The selection process should be completed no later than . XXX 1, 2007. This option requires that I arrive on site Monday, the day before the pre-conference, and stay through the completion of the session.

Option 3 will operate in parallel with either Option 1 or 2, and requires the delivery of the workshop during the conference. My arrival at the conference will be timed to ensure that I am on site the day before delivery of the workshop.

## **Joint Accountabilities**

John agrees to keep me informed of any and all material to be held confidential as I conduct my work, and I agree to operate in strict confidentiality as needed. I work collaboratively with John Smith (and anyone else designated) to share the results of my interviews and the development of my activities. I take responsibility for the development and delivery of each of my activities (plenary session, video, and/or workshop). John agrees to keep me informed of all program changes that impact my presentations, and work with me through the interview process to ensure that I am creating results which are consistent with the XYZ Conference look and feel, and that my results are satisfactory to XYZ.

## **Terms and Conditions**

My fees are based on the project and never on the amount of time required. That way you are encouraged to call on me without worrying about a meter running, and I'm free to suggest additional areas of focus without concern about increasing your investment.

The fee for Option 1 is \$12,000.

The fee for Option 2 which includes Option 1 is \$16,500. If Option 2 is selected, XYZ is responsible for all costs associated with the videographer.

The fee for Option 3 is \$4,000, (when added to Option 1, the total investment is \$16,000; when added to Option 2, the total investment for all activity is \$20,500).

For each option, XYZ is responsible for all costs associated with duplication of participant hand-outs.

First-class travel and accommodations are provided and paid for directly by XYZ.

An initial deposit of 50% secures the date on my calendar when we sign this contract, with the remainder due upon delivery to XYZ by me of all requirements described herein. If you choose to pay the entire amount at the outset, I'm happy to provide a 10% reduction in total fee. The fee is non-cancellable. If for any reason the conference does not take place, I agree to reschedule for another time we can mutually agree upon.

In the event of a "Force Majeure" due to a natural disaster, act of God, war, other declared national emergency or similar event beyond the control of the parties that prevents the conference from being held, these terms shall not exempt, but merely suspend any party from its duty to perform the obligations under this agreement, until rescheduling is practicable after a force majeure condition ceases to exist. Should circumstances such as death, disability, or family emergency prevent me from appearing as scheduled, I will with your written permission provide a comparable substitute. If a substitute can not be obtained, any monies paid will be refunded to XYZ.

Assignment. Neither party shall assign any rights, duties or obligations hereunder without the prior written consent of the other party.



Waiver or Modification of Terms. This Agreement contains the entire understanding between the parties regarding the subject matter hereof. No waiver, alteration or modification of any of the provisions of this Agreement shall be valid and binding unless in writing and signed by a duly authorized representative of each of the parties. All of the provisions of this Agreement are distinct and severable, and if any provisions should, for any reason, be held to be invalid or unenforceable, then the valid and enforceable provisions hereof shall continue in full force and effect.

Relationship of Parties. The relationship of me to XYZ shall be that of independent contractor. Nothing in this Agreement shall be regarded as creating any partnership, joint venture, employment or agency agreement between the parties. I shall have no authority to contract for or bind XYZ and shall not incur obligations or liability for XYZ.

Support Materials. I understand and expressly acknowledge that any support materials I provide may not include copyrighted materials, the rights to which are owned by others, unless they have secured from the copyright owner written permission to use such support materials in connection with the Event, including authority to convey to XYZ the right to reproduce, broadcast, display and distribute such materials.

Governing Law. This Agreement shall be governed and construed in accordance with the laws of [STATE].

**Acceptance**

Your signature below indicates acceptance of this proposal and its terms:  
This proposal is accepted and forms an agreement between XYZ (you) and my company, as represented by me.

Select the options you choose:       Option 1                       Option 2  
                                                  Option 3

For my company:                                              For XYZ:

Me

XYZ Exec Dir name

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Principal

Executive Director

My company / my address

Date: XXX 21, 2007

Date: \_\_\_\_\_

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ID # 21	
CLIENT CHOSE OPTION(S):	1
TAGS / KEYWORDS:	Speaking; gender communications; diversity;

Proposal for XXXXX Conference

Situation Summary:

[CLIENT] is holding a conference focusing on communication in [LOCATION] October 28 – November 1, 2006. [NAME] contacted me about the possibility of speaking on gender communications at the conference. We spoke about a general session with all attendees and a breakout session with a smaller group that would be more specific. I also raised the idea of presenting a second breakout on another related topic since I would already be at the conference. [CLIENT] asked me to write up an initial proposal and include my speaking fees. Below are my ideas based on our conversation. The final content would be designed after more in-depth discussion.

Suggested outline for a ninety-minute plenary session on gender communications

Description:

This will be a ninety-minute general session on how to communicate across the gender gap. Attendees will learn the differences and similarities in communication styles between men and women. The program will include the gender continuum, a gender quiz, facts, anecdotes, and examples. It’s irrelevant if men are from Mars and women are from Venus when we are all on the same planet and interact everyday. At the end of the presentation, attendees will know the strengths and challenges of each style and how to leverage the strengths and work with the challenges.

Purpose:

To understand each others styles of communication, and decision making in order to work together more effectively

Objectives:

- Increase awareness of gender differences and similarities in communication
- Gain insight into male/ female styles of management, working and decision making
- Identify personal gender biases and their effect on behavior at work and in our personal life
- Break through gender based assumptions and stereotypes
- Learn to listen to each other
- Value both styles and what they bring to the workplace and personal life

Topics can include:

- Gender communication styles- nature vs. nurture or a little bit of both
- Differences and similarities in conversation, decision making and leadership
- Language and non-verbal communication/ how easy it is for miscommunication and misunderstanding to occur and strategies for prevention.
- Questions you wanted answered by the other gender but were too afraid to ask (and how does your gender interpret the answers) (how do you even ask the questions)
- Listening to the other while your own lips are sealed
- Strengths and challenges of each style and the need for flexibility
- When each style is more appropriate and why both are crucial for success
- Strategies for everyday interaction across the gender gap

Methodology and speaking style:

Content driven and entertaining. Interactive. Along with facts, examples and anecdotes participants will actually get real time experience in conversing, listening, and identifying their own styles. There will be use of dyads and small group

fishbowls. I believe the best way for people to learn gender communications is when they are having fun, enjoying themselves and feel relaxed.

Gender communication breakout session:

Taking what was learned and experienced in the general session, participants will have an opportunity to relate it to their own profession and their specific work environment. Experiential exercises will give people real time practice in using new skills and tools. We'll discuss situations that would be most appropriate for the male style or female style and how to get comfortable using both. They will be able to discuss gender communication issues in their organization and how they can leverage the strengths of both to be more effective as individuals and as organizations. This will be an opportunity to identify personal and organizational issues and develop strategies to be more productive together.

Suggested third breakout session:

Diversity, Difference, Dialogue; how to communicate across differences
Whether it is across ethnicity, culture, race, religion or work function, bias, stereotypes and pre-conceived notions can cause miscommunication, misunderstanding and missed opportunities. This breakout session would include how to have clear conversations with other administrators Participants will learn skills and tools to dialogue across differences, have meaningful conversations and build better relationships. We'll use their real life issues to develop real life strategies and solutions, plus examine the diversity in the -----and the conference.

Fee Options:

General Session and one breakout-	\$6500.00
General Session and two breakoutsp	\$8,000.00

Expenses are in addition and they include lodging, airfare, ground transportation and meals