



REQUEST FOR PROPOSALS

2021 Rendezvous & Fusion
Tuesday, July 20th – Friday, July 23rd
Four Seasons Downtown Denver

Thank you for your interest in facilitating a breakout session at the 2021 Rendezvous & Fusion! Please complete the [Session Information Form](#) to be considered as a presenter or breakout session facilitator.

The deadline for submissions is January 25, 2021.

Rendezvous & Fusion offer a unique learning experience which promotes the exploration and sharing of best practices for legacy families, families in business and collaboration among advisors and consultants. If you'd like to help us build on the tradition of valuable, unique and innovative learning, we'd encourage you to submit a proposal to be considered as a breakout session facilitator. We do not want to encourage multiple proposals. However, if you submit more than one proposal for consideration please identify which proposal you are most enthusiastic about and indicate if you feel that one of the proposals you are making may be more appropriate for a virtual session than a live session.

The theme for this year's Rendezvous is "**Courageous Resilience: Thriving in Turbulent Times.**" Submissions which help develop the theme will be given special consideration.

We encourage you to submit a 2-3 minute video along with your electronic submission to communicate your passion for the topic you are proposing and why you feel it is valuable to the Rendezvous community. This can be recorded on your phone or computer or can be a short excerpt from a prior presentation on this topic.

As you consider whether to submit a proposal, please keep in mind the nature of our sessions. We place a high priority on proposals from presenters who have attended a Rendezvous or Fusion in the past because they understand the unique nature of our breakout sessions. Our goal is not to have "presentations" but to facilitate peer-to-peer and experiential learning experiences. Learning experiences come in many forms. It is our hope that the workshops be memorable and powerful. We know we will have succeeded when people still remember the experience you offered and what they learned a year later. To that end, we are asking workshop facilitators to do three things:

1. **You should be "on stage" talking for no more than 20 minutes.** This is NOT a presentation. You may tee up your question, provide a framework and two or three key insights, but your job is to facilitate, not teach or present.
2. **Ideally, the session should involve more than words.** Bring a game or an exercise or physical movement. Use art or pictures. Use film. Help people address your compelling question, not just with their intellect, but their heart, body, emotions and so on. If you need help with this the Wisdom Expedition will do its best to support you with ideas and options. Remember, if it is all words, people will likely forget. Be bold – you are among friends.
3. A Fusion (CLE/CPE) track will be offered at Rendezvous. If you are interested in proposing a session that is technical in nature, please indicate in your proposal that you are proposing a Fusion session. Fusion sessions may be exempt from the above stated guidelines, which limit the amount of presentation time.



The deadline for submissions is January 25, 2021. Special permission must be requested for an extension beyond this date and proposals submitted after this date will be considered only at the committee's discretion.

While we hope to be able to gather in-person at the Four Seasons Downtown Denver, we may offer a hybrid or virtual event if it is deemed unsafe or is otherwise not viable for us to host an in-person event. You will be notified as soon as we know the exact format of this event. Therefore, in your proposal we ask that you consider ways to make your session amenable to both in person and virtual formats. Creativity is encouraged, and the Wisdom Expedition will help those selected to adapt as needed. Please note, regardless of format, all breakout sessions will be 75-minutes in length and should adhere to the same criteria set forth in this document.

The Selection Process

All proposals received on or before **January 25th** will be reviewed by the Wisdom Expedition, the committee comprising a small group of PPI Collaborators who are charged with selecting breakouts and FRED talks.

The Wisdom Expedition receives many high-quality proposals. In making selections, we give high priority to those that are interactive with minimal presentation. Our goal is to promote engagement, active peer learning and opportunities to connect with others, as opposed to passive learning. We have historically made rare exceptions to this in cases of original research or truly innovative thought leadership. The Purposeful Planning Institute draws strength from and welcomes the engagement of diverse voices and perspectives, and we encourage submissions that promote themes of inclusion and equity. We also seek breakout sessions submitted by a collaborative team, preferably composed of people from different organizations, because collaborations often lead to breakthroughs in thought and practice. We also minimize the number of sessions that are presentations of a specific product or service. The Rendezvous is not a venue to sell your services, although it often leads to valuable collaborative connections which will advance your practice.

Selections will be made in January and February. We will notify you if your submission has been selected in March. If your submission isn't selected but the proposed topic is deemed to be of significant interest to our attendees, you may be asked whether you would like to submit your topic for an affinity table discussion during one of the lunch hours.

No Honorariums or Expense Reimbursement – A Few Scholarships Are Available

The Rendezvous is a peer learning experience. We anticipate all professionals gathering for the Rendezvous will be capable of leading a breakout session. Therefore, even the session facilitators and presenters are expected to register for the Rendezvous. However, all facilitators and presenters can register at \$550, which is a significant discount. Thanks to generous support of some sponsors as well as some members of the PPI community there has usually been a limited number of scholarships which waive all of the registration fees for a facilitator or presenter. If you anticipate you will need a scholarship to attend Rendezvous, please contact Julie Dorosz or John A. Warnick by phone or email. Your request for a scholarship will be held in strictest confidence and members of the Wisdom Expedition will not be aware of your request.

If you are selected as a facilitator or presenter we will ask that you register by May 15th.

Please feel free to contact either Julie Dorosz or John A. Warnick at 720-458-7777 or via email at info@purposefulplanninginstitute.com with any questions or for additional information.