



REQUEST FOR PROPOSALS

2024 Rendezvous
Monday, July 29th – Thursday, August 1st, 2024
The Westin, Westminster, Colorado

Thank you for your interest in facilitating a breakout session at the 2024 Rendezvous. Please complete the [Session Information Form](#) to be considered as a presenter or breakout session facilitator.

The deadline for submissions is January 16, 2024.

Rendezvous offers 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.

This year's Rendezvous theme, "**Deepening Our Impact: Exploring the Both/And,**" emerged from our community's commitment to fortifying and amplifying both the purposeful success of our client, their families, their businesses, and communities — and so too ourselves, our businesses, and communities. The concept of "Both/And" reflects the nuanced nature of life, acknowledging that it is not simply black or white. It also underscores the significance of simultaneously acknowledging multiple perspectives, approaches, preferences, solutions and/or outcomes. This overarching theme serves as a tribute to the rich diversity of thoughts, interests, and needs within our client base, ourselves, and the broader world.

We do ask that you **only submit one proposal** for consideration due to the large number of session proposals we receive.

Here are a few "secrets" we'd like to share with those who want to increase the likelihood of their proposals being selected. The Wisdom Expedition hopes to see:

- *Proposals relating to this year's theme*
- *Proposals from people who have already attended at least one Rendezvous — as they have a grasp of the unique nature of our breakout sessions*
- *Proposals including a previous Rendezvous facilitator with a new facilitator(s) will also be looked upon favorably*
- *Proposals featuring a collaborative team (2 or 3 facilitators) from different organizations*
- *Proposals integrating different disciplines, practical tools, and opportunities for self-reflection*
- *Proposals of a specific product or service are rarely accepted*

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. To that end, we are asking workshop facilitators to keep the following in mind:

- **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.



Purposeful Planning Institute

- **Ideally, the session should involve more than words.** Bring a game or an exercise or physical movement. Use art, pictures, or film. Help people address your compelling question, not just with their intellect, but their heart, body, emotions and so on.
- If you are newer to our community, we encourage you to **submit a 2-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.

We will be pre-scheduling and promoting approximately 16 breakout sessions. Each session will be 75 minutes in length. Attendees will not be required to pre-register for the breakouts. For that reason, we will not be able to notify you in advance how many people will attend your session. We anticipate most sessions will range in size from 20 - 40 people and that the audience will be very multi-disciplinary.

The Selection Process

All proposals received on or before January 16th will be reviewed by the Wisdom Expedition, the committee comprised of a small group of PPI members who are charged with selecting breakouts.

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.

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.

Past sessions have often focused on **family wealth** and those topics are expected to remain popular. Proposals relating to topics around **family business** and **family office** situations are also most welcome. Sessions that include voices of members of client families (live or recorded) are also always popular when those can be arranged by the facilitators.

Also please see the attached "Commandments" for guidelines. Selections will be made in January and February. We will notify you if your submission has been selected in early March.

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 \$600, which is a significant discount. Thanks to generous support of some of sponsors as well as some members of the PPI community there has usually been a limited number of scholarships which waive all the registration fees for a facilitator or presenter. If you anticipate you will need a scholarship to attend Rendezvous, please contact Shannon Mulvaney by 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 5th. Please feel free to contact either Shannon Mulvaney at 720-458-7777 or via email at shannon@purposefulplanninginstitute.com with any questions or for additional information.



Ten Commandments for Rendezvous Breakout Session Facilitators

1. Thou Shalt be Empowering. Practice blessed Silence to create Space for the Thinking and Feeling of Others; thou shall keep Thy Speech to that Minimum Amount required to Provoke Lively Conversation.
2. Thou Shalt be Relevant. Recall Thy Role to encourage Vivacious, Convivial and Collegial conversation on Matters of Great Import and Consequence to all concerned.
3. Thou Shalt be Engaging. Arrange Thy Colleagues in such Manner as to make All Faces visible to All and thereby Encourage Eye Contact and Engender Discussion.
4. Thou Shalt be Interactive. Consider Liberally Breaking Thy Greater Number into smaller Bands for more Intimate Colloquy and Exploration.
5. Thou Shalt be Fortified. Come Laden with Exercises, Questions, Activities, Games or other Clever forms of Amusement and Delight.
6. Thou Shalt Propagate Wisdom. Glean the Collective Wisdom of the Group for Sharing with the Larger Fellowship of the Rendezvous.
7. Thou Shalt Jest. Lend Serious Attention to Invoking the Spirit of Fun and Creativity.
8. Thou Shalt Honor Pace. Be Mindful of the Internal Processers in Thy midst and set aside Time for them to Think and Collect their thoughts before Discussion.
9. Thou Shalt Promote Digestion and Creativity. Encourage a Time of Reflection for Thy Colleagues to Consider the Hallowed Consequences of Their Learning as they Leave Thy Breakout.
10. Thou Shalt Not Sell. Neither Thy Company, Thy Goods, nor Thy Writings; Lest Thou be Cast Aside into Utter Darkness.



Some “Talmudic” Commentary (Reflections on the application of the 10 Commandments)

CONTENT

Sessions are best when they aren't just your usual shtick - challenge yourself as well as your participants. Focus on great dreams, new ways of seeing an issue, or share something you haven't shared before. Tell stories – people remember what is illustrated, they forget what is not. People learn best when they laugh and move.

Capture what the group learns together. Ask people to write down what they will take with them.

DELIVERY

Don't speak too much. (Remember, you have only 20 minutes max. for your presentation) When you do speak consider taking your group on a hero's journey (where they are the heroes) Make sure you are vulnerable – expose your weaknesses as well as your strengths.

Ask what would it take to make your session remembered a year from now.

Invite inquiry and curiosity.

We encourage you to watch: Nancy Duarte, The Secret Structure of Great Talks, Ted Talk

Inspired by, Donovan, Jeremy (2012-03-24). How To Deliver A TED Talk: Secrets of The World's Most Inspiring Presentations. Kindle Edition.