

USE THIS OUTLINE FOR ADVANCE WORK AND COLLABORATION

Thank you for your interest in sharing your expertise with the WACUBO audience. This outline will help you gather the necessary information to complete your proposal using the submission portal.

Please keep in mind that WACUBO provides content that is eligible for CPE credit according to [NASBA guidelines](#). CPE credits are awarded based on (1) credit per 50 minutes of instruction. WACUBO's Annual Conference concurrent sessions are designed to provide 1.5 credit, which amounts to 75 minutes of instruction. **As such, it is essential that presenters provide 75 minutes of instruction time.**

We wish you all the best with your submission!

Info to Include in Your Proposal

Submission Title

Add a concise and specific title that clearly conveys the presentation's focus. Use proper case and limit your title to 75 characters (not including spaces).

Examples of past session titles:

- Using Analytics to Drive Risk Decisions and Protect Institutions
- Measuring ROI When Modernizing Campus Systems
- Building Better Budgets: Connecting Resources, Stakeholders and Student Success

Proposal Type

You'll choose the type of proposal you are submitting.

- **Member at a WACUBO Member Academic Institution Proposal:** This type of proposal is for submissions from member institutions. All presenters are part of an academic or academic-related institution (*these additional presenters are encouraged but not required to be a WACUBO member*) and are not employed by entities that would be considered Business Partners of WACUBO. **Please note: If your proposal includes speakers from entities considered to be Business Partners, then your proposal will be moved to the Business Partner category and will not be presented to the program committee for review.**

- **Business Partner Proposal:** This type of proposal is reserved for submitters of WACUBO's Business Partners. This proposal must include a co-presenter from a WACUBO member institution. Additionally, the submitter understands that acceptance of this proposal requires a financial obligation to present.

Session Selection

Presentation (single presenter) or Panel Discussion (more than one presenter)

Description of Proposed Presentation

Provide a brief description of your proposed presentation to help the review committee gain a quick understanding of your idea...like an elevator pitch. You'll go into more detail about your session plans in the next field.

Proposal Synopsis

Here's where you'll include the meat of your idea, keeping the following key considerations in mind:

- What is the problem to be solved
- What solution was developed
- Lessons learned
- Why this will benefit your colleagues

Learning Objectives

Provide three (3) learning objectives that are clear, measurable, achievable, and tailored to your audience. This info will not only help focus your content and also help attendees determine if your session will be appropriate for their needs and interests. Each objective should complete the sentence, "After attending this session, attendees will be able to..."

The following are examples of learning objectives that clearly specify the learning outcome. Use action words such as those **bolded** below:

After attending this session, participants will be able to:

- **Differentiate** between the three basic levels in an organization
- **List** the six types of strategic plans

- **Associate** each strategic plan with the appropriate organization level
- **Define** the four steps in the organization strategic planning process
- **Apply** the strategic planning process to create a product marketing plan

Elements of Engagement

Sessions must include at least one element of engagement related to the course content. You will need to select the element(s) of engagement that will be applied during your presentation.

Examples of content related participant engagement include but are not limited to:

- 1) Group discussion
- 2) Polling questions
- 3) Instructor-posed question with time for participant reflection
- 4) Case studies
- 5) Simulations/role play
- 6) Hands-on activities/application of skills or tools
- 7) Shared whiteboards/discussion boards
- 8) Collaboration with other participants

Other NASBA-required elements for Certified Professional Education (CPEs) credits

Field of Study

The fundamental purpose of continuing professional education (CPE) is to help ensure that those seeking CPEs participate in learning activities that maintain or improve their professional competence. Learning activities that improve professional competence include technical and non-technical learning activities. These fields of study include:

- Accounting
- Auditing
- Behavioral Ethics
- Business Law
- Business Management & Organization
- Communications and Marketing
- Computer Software & Applications

- Finance
- Information Technology
- Personal Development
- Personnel/Human Resources
- Specialized Knowledge
- Statistics
- Taxes

If you seek additional information, please refer to the [NASBA Field of Study document](#).

Program Knowledge

Sessions are categorized by program knowledge level needed to successfully complete the course. If your session falls into any of these categories - Intermediate, Advanced, or Update - you will need to provide the necessary prerequisites for the session.

Knowledge Level Descriptions:

- **Basic:** Program knowledge level most beneficial for those who are new to a skill or an attribute. 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.
- **Overview:** Program knowledge level that provides a general review of a subject area from a broad perspective. These programs may be appropriate for professionals at all organizational levels.
- **Intermediate:** Program knowledge level that builds on a basic program, most appropriate for individuals with detailed knowledge in an area. Such persons are often at a mid-level within the organization, with operational or supervisory responsibilities, or both.
- **Advanced:** Program knowledge 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. 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.

- Update: Program knowledge level that provides a general review of new developments. This level is for participants with a background in the subject area who desire to keep current.

Proposal Presenters

Here you'll add all speakers who have agreed to be part of the proposed session. The primary presenter must be from member institutions. Additional presenter(s) are encouraged to be from member institutions but not required. If you are unsure, please contact the WACUBO Office at office@WACUBO.org.

If your proposal includes speakers from entities considered to be Business Partners, then your proposal will be moved to the Business Partner category and will not be presented to the program committee for review.

All speakers must be available to present in person during any of the program dates and agree to the guidelines in this portal before the proposal can be submitted.

Balance your presentation by limiting your proposal to four presenters.

Info you'll need from each speaker:

- Name, title, organization
- Phone number
- Email address
- Biography
 - To comply with NASBA CPE's process, presenter bios are to establish the presenter as a Subject Matter Expert (SME), rather than for promotional purposes
 - You have an option to send an email invite to your co-presenters to add this information.

Be sure to allow time for all proposed speakers to agree to the submission guidelines before the deadline.



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Agreement

All speakers must agree to the [program-specific guidelines](#) for submission and confirm that they consent to be included as a speaker on your submission. Guidelines are outlined on the call's landing page and linked from the agreement task in the submission portal. Adding a speaker to the above task creates an agreement form for them. Use the [Invite](#) button to email each speaker a link to complete the agreement.

Once all speakers have signed their agreements, click the [Save Disclosures](#) button.

Complete Your Submission

Each complete task will show a green check mark. After you have completed all tasks, select Save Submission. The word **COMPLETE** will now appear below your submission title and you'll receive an email confirming your complete submission. Refer to the date in the [Guidelines for Submission](#) to see when you'll hear about your proposal's status.