

Webinar Request for Proposal

Please see the last page of this document for detailed supporting background information.

1. **Proposed Webinar Title:** _____

2. **Session Description** – This should be a paragraph that clearly communicates the overall focus of the webinar (Please use a separate sheet of paper for more detailed summaries.)

3. **Learning Objectives** (What specifically will attendees learn at this session? Provide at least 3.)
At the end of this session, the attendee will be able to...(List, Identify, Compare, Evaluate, etc.)

4. **Who Should Attend?** The goal of a CFMA Webinar is to appeal to a majority of CFMA members. This description should include the experience level of the potential attendee (CEOs, CFOs, CCO's, Controllers, Project Managers, etc.) as well as the category of members this session appeals to from the list below:

General Members: GCs, Subcontractors, Construction Managers, Equipment Suppliers

Associate Members: Public Accountants, Sureties, Insurance Agents, Bankers, Software, Consultants and other service providers.

Others? _____

5. **Benefit Statements** (Why should people attend – What’s in it for them?)

6. **Are there any prerequisites for attendees, such as familiarity with certain subjects or number of years’ experience in a certain area? If so, please list:**

7. **Is the topic time-sensitive? Yes No**

If Yes, please suggest a timeframe for delivery: _____

8. **What is the suggested length of the session: 60 min 75min 90 min**

9. **What NASBA field of study does the topic fall under** _____
(select from the attached NASBA fields of study list)

Presenter Information

Name/Company/Title:

Email:

Phone:

Co-Presenter (if applicable)

Name/Company/Title:

Email:

Phone:

Presenter Bios & Headshots

Please attach an updated bio and headshot if applicable.

References/Experience

Please list several of your recent presentations including date, location and training method (in-person event or webcast). Please list any CFMA presentations first.

1. _____
2. _____
3. _____
4. _____
5. _____

Presenter Scores/Testimonials

If available - please provide some testimonials and/or evaluation scores from your recent presentations (You may attached these separately or provide a hyperlink where they are posted.)

Compensation

CFMA does not provide a monetary stipend or other form of compensation for webinar presenters. Sessions are presented on a voluntary basis by the producing company for CFMA. Webinar producers have first right of refusal to sponsor their webinar.

Proposal Evaluation

Evaluation of your submitted proposal will be based on CFMA’s assessment of the company’s ability to complete the work as specified in this RFP. Please note that submitting a webinar proposal to CFMA does not guarantee automatic selection. All proposals are subject to review and approval by CFMA’s Webinar Committee.

Webinar Development Process

1. CFMA's Expectations and Timeline

- The Producer is the individual and/or company that agrees to develop and present the webinar's content for CFMA for no fee or other compensation.
- Producer must submit a proposal to CFMA Education Department 1-3 months prior to webinar date.
- All proposals are vetted through CFMA's Webinar Committee for approval.
- If the Producer's proposal is approved by CFMA, the presenter will be asked to sign a Presenter Agreement Form.
- Producer will work with CFMA's Education Department to develop the webinar's content based on the requirements below:
 - The presentation must be educational in nature and not be an advertorial or sales oriented pitch for any product or service.
 - The presentation must include at least 3 measurable learning objectives for participants as part of NASBA compliance for CPE credit.
 - The presentation must be formatted to meet CFMA's webinar standards. This includes using the CFMA webinar PPT template and any other NASBA requirements for CPE credit.
 - First draft of presentation should be submitted to CFMA Education Department at least 2 weeks prior to the live event.

2. CFMA Agrees to Provide the following:

- CFMA will schedule a series of teleconferences with Producer to review the process and timeline of deliverables.
- Producing company will be properly credited for their presentation on CFMA's website, social media sites, promotional materials and presentation slides.
- CFMA will schedule a practice session before the live event to review the technical functions of the webinar platform and answer any questions the Producer might have.
- CFMA will provide session evaluations and scores to the Producer after the webinar.

Send all responses to:

Sue Madden, Program Manager, Edu Dept
CFMA, 100 Village Road, Suite 200, Princeton, NJ 08540
Phone: 609-945-2415/Email: smadden@cfma.org

Background: Founded in 1981, the Construction Financial Management Association (CFMA) is the only organization dedicated to bringing together construction financial professionals and those partners serving their unique needs. CFMA is the communications leader and premier source of education and information for financial managers in the construction industry, serving more than 8,000 members via 98 chapters located throughout the U.S. and Canada. CFMA's national headquarters is located in Princeton, NJ and has a staff of 25 full and part-time professionals.

Purpose: In 2009, CFMA launched its Webinar Series as a free member educational benefit enabling constructional financial professionals to earn CPE credits and expand their industry knowledge from the convenience of their own home or office. The success and scope of this series has grown exponentially since its establishment, and CFMA continues to seek high quality industry topics and presenters to provide valuable education to its members. The goal of CFMA's Webinar Series is to provide group internet-based education that directly aligns with our industry domains and membership needs.

Process: CFMA Webinars are typically broadcasted on the second Wednesday of each month at 3:00 PM EST through CFMA's Education Online platform. Sessions generally run 60-75 minutes in length and provide CPE credits to eligible participants. CFMA Webinars are free to CFMA members. Nonmembers pay \$69. CFMA handles the event registration and promotion and provides technical training and support to session presenters. A typical webinar generates between 800-900 attendees depending on topic and interest. All webinars are recorded and available for purchase through CFMA's Education Online website.

2024 Webinar Schedule: *CFMA is currently accepting webinar proposals for its 2023 schedule on the following topics. Please complete the form on the following page to submit a proposal for one or more of the topics below:*

Topic	Possible areas of focus
• Taxes	Construction industry update
• Risk Management	Killer contract clauses/how to successfully mitigate
• Technology	Emerging issues/mobile technology/engaging the millennial workforce
• Healthcare Updates	Benefit options/healthcare reform/concerns for contractors
• Revenue Recognition	New standards and implementation
• Ethics	Industry issues/managing fraud/defining ethical dilemmas

Your Topic: CFMA is always looking for emerging and timely topics of interest to provide to its membership. If you have an idea for an additional topic not listed above that would be of benefit to construction financial professionals, please submit a proposal for consideration by using the form on the next page.