

National Committee on Planned Giving
Member Council and NCPG Board of Directors
Speaking Engagement Guidelines
Last revised: December 2004

Current members of the National Committee on Planned Giving's Board of Directors are available to make educational presentations to NCPG's member councils. This service is provided as a benefit of NCPG council membership, to help further the educational purpose of planned giving councils and promote understanding between councils, their members and NCPG. In considering speaking engagements, board members should observe the following guidelines:

- ❑ Acceptance of speaking invitations is at each board member's individual discretion.
- ❑ Board members must consider their employment and personal commitments when choosing availability to accept a council's invitation. Non-acceptance of a speaking invitation is not meant to imply a lack of interest or council support on the part of the board member or NCPG. NCPG will make every attempt to provide assistance if a council is experiencing difficulty securing a board member to speak.
- ❑ All board members are expected to become familiar with the NCPG "Road Show" presentation and supporting materials. The "Road Show" is provided as a tool to assist in giving presentations about NCPG. Its use in giving presentations about NCPG is not required.
- ❑ Board members should consider submitting information about the topics they are willing to present to NCPG's online Speakers Bureau Directory at <http://www.ncpg.org/councils/auth/>.
- ❑ Board members who intend to speak about the LEAVE A LEGACY® program should familiarize themselves with program objectives and guidelines at <http://www.ncpg.org/lal/?section=9>.
- ❑ The council will reimburse all related travel expenses. Expenses to be reimbursed include, but are not limited to:
 - Coach class airfare. Board members have the right to book a preferred airline or itinerary, but any cost considerations should be clearly agreed upon and communicated by the council prior to booking transportation.
 - Hotel room charge and tax
 - Meals
 - Incidental travel expenses including, but not limited to taxis and tips.
 - It is recommended that council expectations about reimbursable expenses be discussed with the board member and agreed upon in advance.

This applies to routine council meeting presentations, conference keynote or breakout presentations and similar engagements. **This does not apply to multiple presentations or half-day or all-day workshops, payment for which are at the discretion of the individual board member.**

A Speaker Agreement should be executed (see enclosed).

**NATIONAL COMMITTEE ON PLANNED GIVING
Board of Directors Speaking Agreement**

Name of Council _____

Name of Board Member _____

Date of Presentation _____ Time of Presentation _____

Location _____

Topic(s) _____

Expenses to Be Reimbursed _____

Additional Notes _____

Council Contact Information

Name _____

E-Mail _____

Telephone _____

Fax _____

Board Member Contact Information

Name _____

E-Mail _____

Telephone _____

Fax _____

_____ Copy to Council

_____ Copy to Board Member

_____ Copy to NCPG [Fax 317-269-6276]