



A FUN TEN-STEP PRESENTATION PROPOSAL CREATION PROCESS THAT WORKS!

David's Proposal-Writing Guide: Hints for Writing Irresistible Energy Psychology Presentation Proposals & CE Applications

About This Guide

Like it or not, no matter how compelling or worthy your presentation topic or CE course idea might be, you must still be able to construct an effective proposal/application in order for it to be accepted. Especially if you want your presentation to be eligible for Continuing Education credit – and particularly for CE for psychologists! This article shows you, step-by-step, how to respond to Calls for Presentation Proposals, and fill out Continuing Education paperwork, without pulling your hair out! You'll learn a simple and proven ten-step process to help you create presentations you'll be proud to give, attendees will be happy to have attended and CE providers will be most likely to approve for CE credit! Using these ten steps, you'll discover yet another great side-effect of writing great proposals: writing proposals in the way described in this article can help you step into a new level of clarity about your subject matter, which, in turn, can help improve both your clinical and speaking abilities! You'll be taken on this guided tour by Dr. David Gruder, who was the Founding President of the Association for Comprehensive Energy Psychology. He was the principal architect of the Individualized Energy Psychotherapy course that was the first such course accepted for CE credit by the allegedly impossible-to-please California Mandatory Education Program for Psychologists (in 1999)! Combined with his years of experience as a speaker, trainer and marketing consultant, David shares his hints, techniques and tricks that make filling out applications easy, instead of intimidating and complicated. Use this guide and you'll not only do *yourself* a favor – writing presentation proposals and course applications that help make the Energy Psychology field look as credible on paper as we already know it is in practice, is a *gift to the development of the entire Energy Psychology field!* **NOTE – REVIEW CAREFULLY: This guide now includes updated information about what triggers automatic rejection with psychology CE organizations, along with suggestions of replacements for those terms that are more likely to be approved.**

Ten Steps to Getting Your Presentation Proposal/CE Course Accepted

Step 1. Title

Goal: Create a marketing-savvy presentation title.

How to Do It: Wordsmith a short, catchy *title* that *teases* the attendee into reading the subtitle. Wordsmith a succinct and descriptive *subtitle* that the reviewer will react to by thinking, “This sounds like a possibility!” Together as a package, using as *few words* as possible, your title and subtitle should generate enough *curiosity* on the part of the attendee to want *to read the description*.

The Trick: Wordsmith the title for the prospective attendee – to grab attention, stimulate curiosity, and/or create excitement. Wordsmith the subtitle for the presentation proposal reviewer – make sure it describes the key focus and/or benefit of the presentation in professionally credible wording that a Continuing Education credit-awarding reviewer with ***absolutely no understanding*** of Energy Psychology will understand.

Examples of More Effective Titles: “Transforming Trauma with the Energy Therapies...the fine print;” “The Role of Subtle Ideomotor Cueing in Diagnosis & Treatment;” “How to Write Irresistible Presentation Proposals & CE Applications!”

Examples of Problem-Creating Titles: “Accessing Creativity Through Three Aspects of the Human Vibrational Matrix (CE reviewers may not be acquainted with this term),” “Use of Hypnosis & EMDR Combined With Energy Therapies in the Treatment of Dissociative Disorders” (too long), “Posttraumatic Stress Disorders and Eating Disorders” (too vague), “How to Do Muscle Testing” (okay for non-psychologists, but will be instantly rejected for psychologist CE for two crucial reasons: 1) Muscle Testing is not accepted standard of care for psychologists even though Subtle Ideomotor Cueing is; and 2) “How to” and anything sounding related to Thought Field Therapy, Emotional Freedom Techniques or their derivatives will be summarily rejected by psychology CE reviewers!)

Step 2. Description

Goal: Get conference attendees excited to attend while not setting off “red flags” with CE reviewers.

How to Do It: In 50 words (or less if that’s what’s required), create a series of enthusiastically worded *benefit statements* that generate *excitement* without using superlatives, and that helps attendees discover whether this presentation is one they don’t want to miss. This is your publicity!!

Four Wordsmithing Secrets: 1) Make the wording *benefit-oriented* (what attendees will walk out having learned). 2) Use enthusiastic wording, but with as few superlatives as possible (making claims about how wonderful this method is – descriptions are information *not advertisements*!). 3) Focus on the *concepts* you will cover more than how you will cover it (at the current time, saying you will teach attendees “how to” will earn an instant rejection by psychology CE reviewers if you are presenting on anything that even remotely sounds like TFT, EFT or their derivatives). 4) One way to imply “experiential learning” without using the CE-problematic phrase “how to” is to use the word “*demonstration*” or, if you must, the phrase “group demonstration.” 5) Wording emphasizing concepts, *research* and/or *ethical considerations* will be looked upon favorably by CE reviewers.

More Effective: A fast-paced conceptual overview of the Neuro Emotional Technique (NET), which synthesizes psychosomatic and somatopsychic models of illness and healing, Korzybski’s semantic responses, Freud’s repetition compulsion, emotion-neuropeptide theory, emotion/ meridian correlations, reflex testing and memory dynamics. Demonstrations will make the concepts come alive: will become self-evident; self-sabotaging patterns will be quickly identified; treatment resolution will be demonstrated. Intricate, thought provoking, often humorous and, most importantly, very practical.

Problem-Creating: Dry, abstract-appropriate wording that doesn’t make the benefits of attending clear (this will turn off too many potential attendees). Flowery wording that reads like an advertisement touting a method as the best thing since sliced bread (this will earn a rejection by CE reviewers).

Step 3. Abstract

Goal: Show the powers-that-be your subject matter is professionally sound.

How to Do It: Dry, *technical* wording, as though for a scientific journal, so a conservative reviewer who knows NOTHING about the subject matter will react to the abstract by thinking, “At least there appears to be *theoretical* &/or *research* underpinnings to this, it seems like it will be clinically *relevant* to clinicians, even if not me in particular, and the proper disclaimers about the experimental nature of this have been included.”

The Difference Between a Description & an Abstract: A description is an invitation to become intrigued and has the primary purpose of getting attendees to attend your presentation. An abstract reads like a scientific journal and has the primary purpose of satisfying CE people that you can do a professionally credible job in presenting didactic material with a minimum of experiential emphasis! Keep in mind that if you are asked to write an Abstract in addition to a Description, the Abstract is a CE documentation piece so don’t worry about how dry it is – it won’t be used as your publicity!

Proper: “An overview presentation of the Neuro Emotional Technique (NET), which synthesizes subtle ideomotor cueing, Korzybski’s semantic responses, Freud’s repetition compulsion, emotion-neuropeptide theory, emotion/ meridian correlations, reflex testing and memory dynamics.”

“This presentation provides a comprehensive overview of the Energy Psychology field through the use of two teaching charts: the Energy Psychology Lineage Tree and the Continuum of Energy Field Disturbances. Attendees learn how different Energy Psychology methods are related to each other, the western and eastern lineages from which these methods derive, key forebears and innovators, and the range of energy field disturbances for which various Energy Psychology interventions are being investigated for potential efficacy.”

Improper: “...I have been working with a combination of Hypnosis, EMDR...” (self-disclosure irrelevant). “The algorithms are easy, but what about the fine print? How do I decide when and how to treat a trauma? Where do I start? What do I do with clients with years of trauma?...” (reads like a description not an abstract).

Step 4. Objectives

Goal: Generate behaviorally-defined learning expectations.

How to Do It: Turn each benefit statement you wrote in Step 2 into one or more statements about *specific, quantifiable behaviors* that can be *evaluated* by a *post-test*.

The Key: Benefits turned into quantifiable behaviors that can easily be evaluated by a post-test.

Guidelines: Objectives are measurable behaviors not general goals. Selection Guidelines: 1-2 hours = 3 objectives; 1 day = 5-8; 2 days = 10-12. Based on your abstract and description, craft objectives that most easily lend themselves to post-test questions. Short is best because the attendees will have to write each objective in a very small space on their presentation evaluation forms!

Proper: Formula – Use a verb followed by a number followed by the content. For instance, “Identify two distinctly different types of information processing;” “Name the three major aspects comprising the Human Vibrational Matrix;” “Name at least seven root lineages from which Energy Psychology methods derive;” “List at least three of the early Energy Psychology methods and the names of their developers;” “Describe at least three levels of energy field disturbance, and at least one Energy Psychology treatment approach believed to address each of these three levels.”

Improper: “Application of this model for addressing relationship issues with their clients using manual muscle testing and an expanded descriptive language for both client and therapist holding more in their respective and collective fields during their clinical sessions” (not an objective!); “The participant will become aware of the use of a powerful regression technique for healing” (“will become aware” is not quantifiable!); “The participant will learn a major biological model of the mind used in this type of work” (also unquantifiable).

Step 5. Content Outline (Presentation Design Skeleton)

Goal: Select, sequence and set time allocations for each sub-topic you will cover.

How to Do It: Let the benefit statements and learning objectives you write in steps 2-3 guide you in selecting your highest-leverage sub-topics/learning *modules*, selecting the *concepts* (including research and/or ethics issues, if relevant) that you will present in each module, describing the *learning methods* you will use in each module (limit this to didactic and demonstration – again, refer back to what I wrote about this in Steps 2-3!), and determining the *time* allotment for each module. Don't use any jargon whatsoever in your outline! The terms you use must be inherently understandable to a CE reviewer with no prior exposure to Energy Psychology terminology, or you must define, in the outline, any specialized terms you choose to include, again using language inherently understandable to a CE review with no prior exposure to these terms! Remember that this outline is SOLELY to satisfy CE reviewers that your presentation is CE-worthy; the attendees themselves will never see this outline. If you don't follow these guidelines your proposal WILL be rejected by a CE reviewer!!

How to Select Learning Modules: 1 module = 30-90 minutes. Create modules around your description and objectives. Divide each module into sub-topics, each with its own time marker. Here's a generic module outline: Overview (5"), Explication/demonstration (10"); Debriefing/Q&A (5"). Downplay or eliminate references to experiential exercises in the wording of your content outline (once again, please review my comments about this in Steps 2-3 above. Instead of using the word “exercise” or the phrase “how to” use the word “demonstration.” Focus on concepts, theory, research, ethics and the experimental nature of these methods! Make sure your time markers total the length the presentation is supposed to be: CE reviewers make sure these numbers match!!

Proper Outline:

[Example 1] I. Overview – Deciding when to treat (5 min total for this module)

- A. During an emergency phase
- B. Not during an emergency phase

II. When Treatment is Not in an Emergency Phase (30 min total for this module)

- A. Gathering a full psychosocial history (10 min)

B. Treatment Considerations (20 min)

1. Ethics Issues – Just because you “can” do this intervention doesn’t mean you “should”
2. Legal Issues – Videotaping and informed consent
3. Competence Issues – Getting supervision

[Example 2] I. Three Aspects of the Human Vibrational Matrix (20 min total for this module)

- A. Energy Centers (Chakras) – what clients report the felt emotional sense of the seven major centers to be
- B. Biofield – balance & integration, release of emotional distress, research showing relaxation response
- C. Energy Pathways (Meridians) – recent explorations and research in acupoint treatments for relieving emotional stress

Improper: “Using Manual Muscle Testing and our ____ model, I will identify the specific context or contexts where the client experiences relationship issues with the greatest frustration and pain.” (Use “Subtle Ideomotor Cueing” rather than “Muscle Testing” if you must include this in your outline at all! Using the phrase, “I will identify...” is too much verbiage – its just an outline! The time marker was not included! Properly done, this would simply have read: “Six relationship issues causing the greatest frustration and pain (10 minutes).”)

“This will be a demonstration and brief training in the regression technique for physical and emotional healing called _____. It is useful for conference attendees (sic) because it can treat material that current energy therapies do not address well, or be used to speed other energy healing modalities. Thus, this class is to enhance the effectiveness of therapist and to increase their range of treatment options.” (Again, too much verbiage and no time marker included. Other fatal flaws include the following. This reads like an advertisement. Not one concept being taught has been listed! Dump the phrase “brief training,” altogether – the word “demonstration” is quite enough. Typos (“attendees”) reduce your professional credibility in a CE reviewer’s eyes – be sure you do a spell check on your document before sending it!! A reviewer will reject an outline (or a presentation description!) that makes unsubstantiated claims – “it can treat material that current energy therapies do not address well.”)

Step 6. Post-Test

Goal: Demonstrate to a CE reviewer that you are capable of finding out whether your attendees learned what you intended them to learn.

How to Do It: Use a post-test *format* that is *easy* and *rapid* to administer. Write *one question per objective* (more if your course length is a day or longer). Construct the test to serve as a meaningful *check-for-understanding* for the attendee. Be sure to include the answer key for the reviewer!!

The Fastest Way to Write a Good Post-Test: 1) Select one question per objective. 2) Use T/F, Multiple Choice, or Fill-in word/phrase format. You can either use one format for the entire test or you can tailor the format to fit the test item. Include an answer key for the reviewer to consult!

Proper:

1. The 3 most commonly focused-upon aspects of the human vibrational matrix are: _____, _____ and _____.
2. Using Energy Therapies you find that the client’s SUDs level is at a 4 and the session time is over. You:
 - a) Stay longer because the SUDs should go to a 0
 - b) Stop treatment 5 minutes before session end time; assign client homework to manage remaining distress
 - c) Schedule another appointment
 - d) Both b & c
3. The most severe level of energy field disturbance is psychological reversal: ___ True ___ False
[Answer Key: 1 = biofield, chakras, meridians; 2 = D; 4 = True]

Improper:

“Describe how you could release limiting beliefs and install desired beliefs concerning creativity.” “Explain your present understanding of how Mindell’s Process-Oriented model integrates with the Energetic Healing™ model.” (both of these requires too long an answer to be a useful post-test question)

“Aspects of hypnosis which are different from the energy systems.” (this is an un-testable item because the question being asked is unclear and none of the above three test formats – T/F, fill-in, or multiple choice – are provided)

- * Do you now have an unusual feeling that: 1. You are intensely (sic) alive, and everything around you is also? ; 2. When you think about past traumas, they have no emotional charge?; 3. You feel a calm, peace and light that

is very different than usual, or when you walked in?" (I hope that at this point in the current article, the reason why this post-test question will be totally unacceptable to a CE reviewer is quite obvious!)

Step 7. Bibliography

Goal: Select a minimum of three credibility-enhancing citations (or 6+ for courses lasting one day or longer) and use a standard layout format – usually the American Psychological Association's (but see further below for a simple guideline).

How to Do It (What a Bibliography Must Contain to be Acceptable to the Powers-That-Be): Select the citations that your presentation is based on or supported by that most enhance your topic's credibility in the mind of a CE reviewer who knows nothing about the topic you're presenting on or about Energy Psychology in general. Include anything you yourself may have written related to this topic. Research articles from peer-reviewed professional journals are the most desirable, followed by text books, followed by research and/or theoretical articles from non-peer-review journals followed by other books written by professionally-credentialed authors. Lay out the information in an academically standard manner (again APA format will be looked upon the most favorably by a CE reviewer).

One Acceptable Citation Structure: Author(s) Last name, first name. Book or article title. [Publication & volume if journal citation.] Publisher Location (City, State), Name: Publication or copyright date.

Improper Citation Structure: Omitting citations entirely or listing only title & author without publisher information and date.

Step 8. Vita

Goal: Include information about your education, licensure, supplemental professional credentialing and association memberships, professional work experience, publications and prior presentations you've done, etc., that most help establish your professional credibility to present on this topic.

How to Do It: Include information about yourself in each of the following categories – identifying information, description of present position(s), licenses/certifications, degrees (what, from where, when), specialized training, professional organization memberships, list of sample prior presentations to professional groups (if any), books or articles written and/or tapes recorded for sale (if any), names of any organizations that have already approved you as a continuing education provider.

What a Vita Is: A vita is a credibility-creation outline used to help obtain speaking engagements, media interviews, consulting contracts, or anything else of a transient nature. A resume is not a vita – it is a document designed for a prospective employer. A biography is a summary of your background written in paragraph form, or a publicity blurb about you, will NOT be acceptable to a CE reviewer in place of a vita). Just as a bibliography is a CE credibility piece positioning your topic as a credible one in a CE reviewer's eyes, your vita is a CE credibility piece positioning *you* as the right one to select this topic, again in a CE reviewer's eyes.

Proper Vita Sections: Licenses, degrees, specialized training, present position followed by employment history (dates, facility, location, responsibilities), professional association memberships, sample past presentations (event, location, date, presentation title, type of presentation [e.g. breakout], & if CE was awarded, say it!), publications (books, articles, audiotapes, videotapes), approved CE provider certification (if any).

Step 9. Ancillary Material

Goal: Make your ancillary material (if requested) shine in a way that gives the reviewer confidence that you can be trusted to handle the logistical details.

How to Do It: First of all, NEVER think that you can get away with NOT submitting a portion of a call for proposals in PRECISELY the form requested! This will be interpreted as you attempting to cut corners, which will be a mark against you in a reviewer's eyes, often to such an extent that it will guarantee automatic rejection of your proposal! Second, always fully complete the application cover sheets, remember to duplicate as many copies of your application and materials as they request, and, as a general rule, *don't* give them anything they don't ask for. Third, for independent CE course applications, model your attendance sheet, course evaluation form, certificate of CE completion, etc., based on forms from other people's courses that have previously received approval from that organization. (You'll be on very solid ground modeling your forms after those I developed for ACEP's conferences!)

Tips: Varying types of ancillary material are sometimes required in presentation proposals and course applications. Never try to get away with omitting ANY material requested. To do so automatically reduces your credibility with the reviewer! In this same vein, always spell-check your material. Typos bring credibility into question! Use this ancillary material to tie your presentation in to the conference' or CE organization's objectives. Always provide information on your A/V needs. Develop a brief (1 paragraph) biography on yourself for them to use in PR (again, this is NOT your vita!). And always include your contact information: address, e-mail, phone, fax – make it easy for them to be in touch!

Step 10. Finalize Your Title & Description

Goal: Following the above steps will help you become clearer than ever about what you're really presenting. Therefore by the time you're at this point in the proposal-generating process, you're in an excellent position to tweak the initial draft of your title and description to make them even more accurate and enticing!

How to Do It: Allow the clarity and enthusiasm you developed through putting together all the above material guide toward fine-tuning the wording of your title and description.

Tips: By the time you've reached this step, you'll rarely still be exactly where you started – you'll be in a much better and clearer place than when you started! So, now ask yourself what you're *really* presenting. Ask yourself what the attendees' biggest benefits will be and how to word these in ways that won't be red flags to CE reviewers. Then, edit the wordsmithing of your title and description to reflect this, so your content is solid and credible while your wording flavor conveys that your presentation won't be dry or boring.

Special Supplement: Specialized Wordsmithing Guidelines for Writing Proposals Specifically for Psychologist CE

Goal: Replace common Energy Psychology terminology with wording that's less likely to trigger automatic proposal rejections for psychologist CE.

How to Do It: Know which terms to avoid and alternate wording to replace these terms with.

Tips: The following chart includes common Energy Psychology terms that are negative triggers for conventional psychologists (causing automatic presentation proposal rejection by California's Mandatory Continuing Education for Psychologists program as of May 2005), along with wording substitutions that *may* be more likely to be acceptable to psychology CE approval providers. These substitute phrases should be included in ALL sections of your proposal in place of the corresponding 'red flag' term. *When applying for psychologist CE*, the "automatic rejection" terms listed below

should be omitted from anywhere in your proposal. Remember: there's always more than one way to say things, and in this case saying what you need to say by steering clear of terms conventional psychology presently considers "red herrings" is most strongly advised and requested!

EP Term Known to Cause Automatic Proposal Rejections	Possibly Safer Substitute Phrasing
Thought Field Therapy, Emotional Freedom Techniques	Energy Psychotherapy
Tapping	Client self-activation of their bioelectric energy system as an ancillary psychotherapeutic adjunct in treating psychological issues
Meridians	Bioelectric pathways documented in acupuncture research to affect and be affected by mind-body interaction
Chakras	Centers of bioelectric concentration documented in some university studies to affect and be affected by mind-body interaction
Muscle Testing	Energy checking via Subtle Ideomotor Cues providing information from the client's unconscious to augment their self-report
Acupuncture	Bioelectric energy-based interventions that are currently accepted in mind-body psychology and complementary medicine, which may be activated via needles, rubbing, percussing and other methods
Chi	The body's collective bioelectric output, which, when intervened with, may provide psychotherapeutically compatible adjuncts for facilitating treatment of certain psychological issues, based on significant clinical evidence and preliminary empirical studies
"How to," "Experiential"	Demonstration
Successful Results	Novel/experimental methods

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