

## Request for Agenda Proposals 2010 Guidelines

SRI in the Rockies is the premier conference for the sustainable and responsible investment (SRI) industry in North America, and the largest and longest running SRI industry conference in the world. In 2010, we will be hosting our 21st annual event at the [JW Marriott Hill Country Resort & Spa](#) in San Antonio, Texas, November 18–21, 2010.

Please read the following overview information and use the **Proposal Outline** below when submitting a Proposal for a speaker or session.

### Overview

The SRI in the Rockies Conference is owned and produced by First Affirmative Financial Network with the support of, and in collaboration with, many organizations involved in the sustainable and responsible investment industry.

SRI in the Rockies Conference participation is open to all SRI industry practitioners, investment professionals, institutional investors, and related organizations. The conference experience features an outstanding series of educational sessions and a focused opportunity to network with hundreds of like-minded individuals, organizations, and leaders in the field.

The 2010 conference is expected to attract over 650 participants. The audience will be diverse—participants will come from many professional disciplines and from both large and small firms, from all over the United States, Canada, and several other countries.

SRI in the Rockies is not an entry-level conference. The agenda will include a “New Participant Orientation” session as well as an “SRI 101” breakout session designed to present industry basics and language. All other conference sessions should be challenging and should cover advanced material.

Discussion can be intense, and presenters should expect to be challenged with difficult questions.

The RFP process generally results in four or five times as many proposals as we have space available on the conference agenda. There are a limited number of presentation times. Know that sometimes ideas are accepted as proposed; sometimes proposals on similar topics are combined into expert panels; sometimes proposals are declined outright; and sometimes we will identify a topic of interest that was not reflected in a proposal and design a session around it. We reserve the right to mix and match and be creative in the effort to build the strongest conference agenda possible.

## Agenda Tracks

The conference agenda includes two types of sessions. Plenary sessions have exclusive time slots—nothing else is scheduled concurrently. Plenary sessions run 60 minutes and can feature one speaker, two speakers, or a small panel of experts.

In addition, the agenda features four sets of five 75-minute breakout sessions (20 in total). Five breakout sessions run concurrently. Breakout sessions are offered in two agenda tracks:

The **Professional Education Track** focuses on investment and practice management issues. We seek to develop PE sessions that will qualify for Continuing Education (CE) credits for Certified Financial Planners.

The **Social Issues Track** focuses on various timely social and environmental issues, shareholder advocacy initiatives, and community investment strategies.

Separately, the conference agenda accommodates up to 20 Sponsored Presentations (30-minutes each) during which the sponsoring organization may present whatever they would like to share with conference participants. For more information about securing a Sponsored Presentation time slot, please contact Krystala Kalil at 888.774.2663 / [Krystala@SRIntheRockies.com](mailto:Krystala@SRIntheRockies.com).

## Speaker Registrations

All conference participants, including presenters, are expected to register for the conference and provide full contact information. Conference registration fees include all meals, breaks, and receptions.

All keynote/plenary session speakers will be provided with complimentary conference registration and are encouraged to participate in the full conference.

Most breakout session presenters are typically drawn from the ranks of the SRI industry and would normally be expected to attend their industry conference. For these people, an opportunity to speak is viewed as offering added value to their 2010 SRI in the Rockies experience. Industry 'players' will be asked to pay a \$550 registration fee in 2010, the approximate cost for meals, receptions, and breaks during the conference for a single participant.

A breakout session speaker who is not actively involved in the SRI industry, who on his/her own would not be expected to attend the conference, will be offered one full day at the conference, compliments of conference organizers. Such non-industry speakers who choose to extend their stay at SRI in the Rockies will be expected to pay a per-meal rate of \$65 (average cost) for each meal served during the additional time they spend at the conference.

## Travel and Lodging

All conference participants, including speakers, are expected to arrange and pay for their own travel and lodging. A block of rooms is reserved for conference participants at discounted prices.

At the discretion of conference organizers, **some** keynote/plenary session speakers **may** be offered complimentary lodging as an honorarium for speaking at SRI in the Rockies. In special situations, a keynote/plenary speaker may be reimbursed for travel expenses. No lodging or expense reimbursements will be offered to breakout session speakers.

## Audio Recordings

All educational sessions are audio recorded and the recordings are posted to the conference website for public access. Plenary sessions may also be video recorded. Speakers are asked to sign a Recording Authorization Form which authorizes conference organizers to record their session and post it to the conference website, along with accompanying PowerPoint presentations or other materials.

## Selection Criteria

- The topic is of interest to a broad spectrum of SRI practitioners.
- The topic addresses social and/or environmental investment concerns and/or the development of the SRI industry.
- The topic is timely.
- The presenter is an excellent public speaker.
- The presenter and/or topic can attract new participants to the conference.
- The presenter and/or topic have not been featured recently at SRI in the Rockies, or the session builds on a popular session from the previous year.
- The topic can strengthen SRI businesses and inspire new levels of commitment to sustainable and responsible investing.
- The presenter and/or topic enhance the diversity of the conference.

## Submitting Your Proposal

Please e-mail your proposal to [Krystala@SRIintheRockies.com](mailto:Krystala@SRIintheRockies.com) and copy to [info@SRIintheRockies.com](mailto:info@SRIintheRockies.com). Please use the Proposal Outline below to formulate your proposal and send it as an attached Microsoft Word file.

Receipt of your proposal will be acknowledged within one week. Notification as to whether or not your proposal has been accepted may take several months, usually in June.

## Deadline for Submission of Proposals

Plenary Sessions/Speakers: **January 29, 2010**

Breakout Sessions: **February 12, 2010**

## 2010 Proposal Outline

### Submission Deadlines:

Plenary Sessions/Speakers: **January 29, 2010**

Breakout Session Proposals: **February 12, 2010**

1. **Proposed Session Title:**
2. **Submitted by:** Professional Title:  
Professional Affiliation:  
Mailing Address:  
Telephone / Fax:  
E-mail Address:
3. **Type of session:** Plenary Session or Breakout
4. **Agenda Track:** Professional Education (PE) or Social Issues (SI)
5. **Session Objective and Description:** Please limit to 100 words
6. **Session Format:** Panel, Participative, Lecture, etc...
7. **Session Presenter(s):** Please provide the name and a brief bio (no more than 100 words) for each proposed presenter.
8. **Do you know the presenter(s)?** Can you get him/her/them to agree to come and speak at SRI in the Rockies?
9. Please describe the **relevance and timeliness** of this topic to the SRI in the Rockies audience and the SRI industry (limit 150 words).
10. **SRI in the Rockies** seeks sessions that will challenge conventional thinking and offer a variety of perspectives on topics of interest to the SRI industry. What diversity would the proposed session and presenters bring to the conference? Please consider gender, race/ethnicity, expertise, cultural, and geographic representation. (Limit 100 words)

*Thank you for providing a complete picture of the session and/or speaker you are suggesting for the 2010 SRI in the Rockies Agenda. We appreciate your thoughtful recommendation and look forward to seeing you in San Antonio!*