

Request for Agenda Proposals

2012 Guidelines

Now in its 23rd year, The SRI Conference on Sustainable, Responsible, Impact investing, the largest and longest running conference of its kind, will be held October 2–4, 2012. We will be gathering at the Mohegan Sun Conference Center in Southeastern Connecticut, about half way between New York and Boston.

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

Overview

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 2012 conference is expected to attract over 600 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.

This is not an entry-level conference. The agenda will include a “New Participant Orientation” session as well as an “SRI Basics” breakout session designed to introduce newcomers to industry language and concepts. However, 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 during the Q&A.

The RFP process generally results in three to four times as many proposals as we have space available on the conference agenda. There are a limited number of presentation time slots. Occasionally, ideas are accepted as proposed; but more often, proposals on similar topics are combined into expert panels. Sometimes proposals are declined outright; and sometimes the Agenda Committee 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 possible program.

Session Types

The conference agenda includes two types of sessions. Plenary sessions have exclusive time slots—nothing else is scheduled to compete. Plenary sessions generally run 30, 45, or 60 minutes and can feature one, two, or, occasionally, three speakers. Breakout sessions can be 60- or 75-minutes long, and there are usually four or five sessions scheduled concurrently. Breakout sessions usually feature a panel of experts.

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, receptions and sessions.

Industry “players” who are invited to speak (both plenary and breakout session speakers) will be asked to pay a \$450 registration fee—the approximate cost for meals, receptions, and breaks during the conference for a single participant.

Presenters who are drawn from the ranks of the SRI industry would normally be expected to attend the premier industry conference. For these people, an opportunity to speak is viewed as offering added value to their 2012 SRI Conference experience.

Any speaker who is not actively involved in the SRI industry, who on his/her own would not be expected to attend the conference, will receive a complimentary registration courtesy of conference producer, First Affirmative Financial Network.

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 The SRI Conference. 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.
- Proposals that tout one company/organization and/or its products and services are not likely to be accepted.
- Proposals that showcase a restricted point of view without room for active discussion are not likely to qualify.
- 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 in recent years.
- The topic or speaker builds on a popular session from the previous year.
- The topic can strengthen and inspire new levels of commitment to sustainable, responsible, impact investing.
- The presenter and/or topic enhances the diversity of the conference.

The Agenda Committee has a strong tendency toward creating panels as opposed to showcasing an individual speaker in the breakout sessions. This allows for an important opportunity to present diverse perspectives.

Submission Deadlines:

Plenary Sessions/Speakers: January 20, 2012
Breakout Session Proposals: February 20, 2012

Submitting Your Proposal

Please e-mail your proposal to Krystala@SRIconference.com with a copy to info@SRIconference.com. Please use the Proposal Outline below to formulate your proposal and send it as an attached **Microsoft Word** file. Please do NOT send a PDF. 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.

2012 Proposal Outline

1. **Proposed Session Title.**
2. **Submitted by:** Title / Affiliation / Mailing Address / Telephone / Fax / E-mail Address:
3. **Type of session:** Plenary Session or Breakout
4. **Session Objective and Description.** (Limit to 100 words)
5. **Session Format:** Panel, Participative, Lecture, etc...
6. **Session Presenter(s):** Please provide the name and a brief bio (no more than 100 words) for each proposed presenter. Note: It is not necessary that the proposed presenters be confirmed by you at the time of proposal submission.
7. **Do you know the presenter(s)?** Can you get him/her/them to agree to come and speak at the conference? Do you have contact information for the proposed presenters?
8. **Please describe the relevance and timeliness** of this topic to SRI investors and investment professionals (limit 150 words).
9. **The SRI Conference Agenda Committee** 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)
10. **Please submit your proposal as a Microsoft Word file.**

Thank you for providing a complete picture of the session and/or speaker you are suggesting for the 2012 conference agenda. We appreciate your thoughtful recommendation and look forward to seeing you in Connecticut!

Questions? Contact Conference Coordinator Krystala Kalil at 888.774.2663 / Krystala@SRIconference.com