

## Request for Agenda Proposals

### 2017 Proposal Submission Guidelines

The SRI Conference on Sustainable, Responsible, Impact investing, the largest and longest running conference of its kind in the world, will be November 1–3, 2017 at the Hotel del Coronado in San Diego, California. Please read the following overview information carefully and use the **Proposal Outline** on page three when crafting your proposal for a speaker or session.

#### Overview

Conference participation is open to all SRI/ESG 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 2017 conference theme is **All In For Impact (#AllinForImpact)**. We expect to attract about 700 attendees. The audience will be diverse—participants will come from many professional disciplines and from both large and small firms.

This is not an entry-level event. There will be a “New Participant Orientation” and an “SRI Basics” session designed for newcomers to responsible investing. All other conference sessions should be challenging and should cover advanced material. Discussions 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 there is space available on the conference agenda. Occasionally, ideas are accepted as proposed; but more often, proposals on similar topics are combined into expert panels. Sometimes proposals are declined outright (for a variety of reasons). Sometimes the Agenda Committee will identify a topic of interest that was not reflected in a proposal and design a session around it. The Agenda Committee reserves the right to mix and match proposals and be creative in its efforts to build the strongest possible program.

#### Session Types

**Plenary sessions** have exclusive time slots—nothing else is scheduled to compete. Plenary sessions generally run 30, 45, or 50 minutes and can feature one, two, or, occasionally, three speakers.

**Breakout sessions** are at least 50 minutes long, and there are usually four sessions scheduled concurrently. Most often, breakout sessions will feature a panel of two or three 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 pay a discounted registration fee of \$495 — the approximate average cost for meals, receptions, and breaks per person during the conference. These presenters, who are drawn from the ranks of the SRI/ESG industry, are generally expected to attend the premier industry conference and an opportunity to speak is viewed as a ‘value-add.’

Any speaker who is not actively involved in the SRI/ESG 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.

### Speaker Travel and Lodging

All conference participants, including speakers, are expected to arrange and pay for their own travel and lodging. A block of rooms at the [Hotel del Coronado](#) 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 / Video Recordings

All speakers and sessions may be audio recorded and/or captured on video. Any recordings may be posted to the conference website for public access, and certain sessions may be posted to a platform where access is only available by subscription. Speakers are expected to sign a Recording Authorization Form which authorizes conference organizers to record their session and post it in full, or publish edited shorter pieces of any presentation, to the conference website, along with accompanying PowerPoint presentations or other materials. The Recording Authorization Form also provides conference organizers with permission to use any audio/video recordings in social media marketing.

### Selection Criteria

- The topic is of interest to a broad spectrum of Sustainable, Responsible, Impact investors and practitioners.
- The topic addresses environmental, social, governance issues and concerns and/or the development of the SRI/ESG 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 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. (No all-male panels.)
- Preference may be given to presenters and/or topics that have not been featured in recent years.
- 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.
- Everyone is busy and the Agenda Committee members are volunteers, so know that wordy proposals that do not follow the proposal outline may not even be read!

The Agenda Committee has a strong tendency toward assembling panels of experts to speak from various perspectives on a breakout session topic, as opposed to showcasing an individual speaker.

## Submitting Your Proposal

**Please read the first two pages of this document carefully before you proceed with your proposal.**

Please email your proposal to [Krystala@SRIconference.com](mailto:Krystala@SRIconference.com) with a copy to [info@SRIconference.com](mailto: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. If you submit more than one proposal, please submit each in a separate Word document. 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. Feel free to inquire if you have not heard by July 1, 2017.

Submission Deadline: **February 15, 2017**

## 2017 Agenda Proposal Outline

1. **Proposed Session Title.**
2. **Submitted by:** Title / Affiliation / Mailing Address / Telephone / Fax / Email Address
3. **Type of Session Proposed:** Plenary Session or Breakout
4. **Topic Area:** (A proposal can fit more than one category.)
  - ✓ ESG Integration   ✓ Governance   ✓ Community Impact Investing   ✓ Shareowner Advocacy
  - ✓ Professional Education
5. **Session Objective and Description.** (Limit 60 words. Incomplete sentences are acceptable, *if they make sense.*)
6. **Session Format:** Panel, Participative, Lecture, etc.
7. **Session Presenter(s):** Please provide the name, affiliation, and contact information (email address, telephone number) for each proposed presenter. It is not necessary that the proposed presenters be confirmed by you at the time of proposal submission. If the presenter has not been on our agenda previously, please include 1–2 video clips of him / her speaking, if available.
8. **Please describe the relevance and timeliness** of this topic to SRI investors and investment professionals. (Limit 75 words. Incomplete sentences are acceptable, *if they make sense.*)
9. **The 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 60 words. Incomplete sentences are acceptable, *if they make sense.*)
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. We appreciate your thoughtful recommendation and look forward to seeing you in San Diego, November 1–3, 2017!***

**QUESTIONS?** Contact Conference Coordinator, Krystala Kalil: 888.774.2663 / [Krystala@SRIconference.com](mailto:Krystala@SRIconference.com).