



# Guidelines for Agenda Proposals 2009

SRI in the Rockies is the premier conference for the sustainable and responsible investment (SRI) industry in North America. In 2009, we will be hosting our 20th anniversary event at the **JW Marriott Starr Pass Resort & Spa in Tucson, Arizona, October 25–28, 2009.**

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

## Overview

The SRI in the Rockies Conference is produced by First Affirmative Financial Network in collaboration with the non-profit, U.S.-based, Social Investment Forum. Conference participation is open to all SRI industry practitioners, investment professionals, and related organizations. The conference experience features an outstanding series of educational sessions and a focused opportunity to network with hundreds of other like-minded individuals, organizations, and leaders in the field.

The 2009 conference is expected to attract over 800 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. Due to the limited number of presentation times, we will not be able to accommodate many of the proposals submitted. 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 the Agenda Committee will identify a topic of interest that was not reflected in any proposal and design a session around it. The Committee reserves 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 45, 50 or 60 minutes and can feature one speaker, two speakers, or a 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. These sessions generally 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.

## Registration

All conference participants, including presenters, are expected to register for the conference and provide full contact information.

Breakout presenters are typically drawn from the ranks of the SRI industry. An opportunity to speak offers an added value to their 2009 SRI in the Rockies experience and, since most breakout session speakers would normally be expected to attend their industry conference, it is expected that they pay a full registration fee.

A speaker who is not a Social Investment Forum Member or not affiliated with an SIF organizational member, is not actively involved in the SRI industry, and who on his/her own would not be expected to attend the conference, will be asked to pay a per-person average charge for food and beverages (\$500 covers the cost for all meals, receptions and breaks during the conference).

Some plenary session presenters may be offered complimentary lodging and meals, as well an opportunity to participate in the entire conference, as honorarium for speaking at SRI in the Rockies.

## 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.

Some plenary session presenters may be provided with lodging as honorarium for speaking at SRI in the Rockies.

## Audio Recordings

All educational sessions are recorded and posted to the conference website. Speakers are asked to sign a Recording Authorization Form which authorizes conference organizers to record their session and post it to the conference website for public access, 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 the conference, 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 socially responsible investing.
- The presenter and/or topic enhances the diversity of the conference.

## Proposal Submission

Please e-mail your proposal to [info@SRIintheRockies.com](mailto:info@SRIintheRockies.com) with a copy to [krystala@SRIintheRockies.com](mailto:krystala@SRIintheRockies.com). Please use the template below to formulate your proposal and send it as an attached 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.

## Deadline for Submission of Proposals

Plenary Sessions/Speakers: **January 15, 2009**

Breakout Sessions: **January 31, 2009**

## Questions

Call 888-SRI-CONF (888-774-2663) or e-mail [Krystala@SRIintheRockies.com](mailto:Krystala@SRIintheRockies.com).

# Request for Proposal

## Submission Deadlines:

Plenary Sessions/Speakers: January 15, 2008

Breakout Session Proposals: January 31, 2008

1. **Proposed Session Title:**
2. **Submitted by:** Professional Title:  
Professional Affiliation:  
Mailing Address:  
Telephone / Fax:  
E-mail Address:
3. Are you submitting on behalf of a Social Investment Forum Working Group or Task Force?
4. **Type of session?** Plenary Session or Breakout
5. **Agenda Track?** Professional Education (PE) or Social Issues (SI)
6. **Session Objective and Description** Please limit to 100 words
7. **Session Format** Panel, Participative, Lecture, etc...
8. **Session Presenter(s)** Please provide the name and a brief bio (no more than 100 words) for each proposed presenter.
9. **Do you know the presenter(s)?** Can you get him/her/them to agree to come and speak at SRI in the Rockies?
10. Please describe the **relevance and timeliness** of this topic to the SRI in the Rockies audience and the SRI industry (limit 150 words).
11. 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 100 words)

*Thank you for providing a complete picture of the session and/or speaker you are suggesting for the 2009 SRI in the Rockies Agenda. We appreciate your thoughtful recommendation and look forward to seeing you in Tucson!*