# NIRI 2019 Annual Conference – Call for Session Proposals

## Overview

NIRI invites you to submit a proposal for a session at the upcoming 2019 Annual Conference, June 2-5, 2019, in Phoenix, AZ. Anyone may submit a proposal. Individuals who are selected to speak must register for the Annual Conference. The selection of sessions is a competitive process, so closely reviewing and following the instructions and selection criteria will strengthen your proposal.

NIRI seeks to continuously improve and produce the best possible Annual Conference experience for attendees. By innovating and welcoming fresh thinking, NIRI seeks to create an informative and memorable event, so be creative in your proposals. Each proposal is evaluated by members of the 2019 Annual Conference Committee (ACC) using a process that includes ratings for session quality and potential popularity. Additionally, volunteers evaluate proposals based on the overall fit within the program, alignment with the IR Body of Knowledge, and other measures to ensure the best learning experience for attendees.

The NIRI Annual Conference is the world's largest gathering of investor relations professionals. This three-day conference includes dozens of presentations on the most relevant topics in the industry and an exhibit hall showcasing the latest tools and resources to support IR practices. The conference presents a unique opportunity for networking with peers, sharing best practices, and learning in practical workshops and general sessions by industry leaders and other experts. The NIRI Annual Conference is the "must attend" event for both experienced and early-career professionals.

## Participants

The NIRI Annual Conference attracts a wide range of participants from the investor relations community. The Conference is well attended, usually attracting over 1,100 participants. Around two-thirds of registrants are investor relations practitioners, representing a variety of companies across all market capitalizations. Attendees have a range of experience levels, including senior IR professionals as well as those just starting their careers in IR. While the majority of attendees come from the United States, around 10% are international.

## Important Dates

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| Call for Proposals Opens: | Tuesday, October 23, 2018 |
| Proposal Submission Deadline: | Sunday, November 18, 2018 at 11:59pm ET |
| Proposal Reviews: | November 2018 – January 2019 |
| Final Proposal Status Notifications Sent: | Friday, January 11, 2019 |
| 2019 NIRI Annual Conference: | June 2-5, 2019 |

# Session Formats

The conference offers and NIRI seeks multiple presentation formats, listed below.

- **General Session**: A presentation to the full group of attendees. Topics and speakers must be compelling to this large audience and representative of the global IR capital markets engagement community. Can include proposed keynotes and speakers outside the IR field.

- **Structured/Panel**: (60-minute sessions) A traditional-style session with one to four instructors or speakers instructing attendees on how to meet a standard, best or leading practice. Content comes from speakers and the session covers fundamental to advanced understanding of the topic or function. Panel discussions should present multiple perspectives about an issue, practice, or topic of interest. Panelists should offer perspectives from different organizations and have identifiable, unique points of view about the topic.

- **Story Telling:** (45 to 60-minute sessions) Session that explores a single idea, theme or concept. Illustrates practical tips and/or delivers an IR-relevant message through brief story telling from one or more speakers. Sessions can vary in length and include more than one consecutive speaker per session.

- **Topic Vignettes**: An approximately 20-minute presentation delivered by an individual with great passion for the topic. The presentation is followed by a short Q&A session led by a facilitator. Think TED Talks.

- **Edutainment:**  Creative and experiential formats that inspire and refresh. Think outside the box!

- **Workshop/Case Studies:** (2-hour sessions; one to three presenters): Workshops focus on in-depth instruction of practice(s) highlighted through the use of case studies or interactive exercises. The ideal workshop includes a mixture of lecture style teaching, along with individual/group exercises, demonstrations, and discussions.

- **Discussion Group Sessions** (45-minute session; one or two leaders). Highly interactive group discussions that focus on a current topic or issue in the industry. A discussion leader briefly presents opening remarks to define the session and set the context. A minimum of five questions submitted with the session proposal provide the structure for the discussion that follows. The discussion leader encourages participants to share their perspectives and provides a summary and closure to the discussion.

*Room Setup and A/V: Sessions will be set in classroom/theater style seating with standard A/V equipment including: podium, a panelist table and chairs, microphone(s), laptop, projector, presentation remote, screen, and cable. Internet access is provided. Live polling/Q&A technology will be available on request and only with advance notice. Any special setup requests other than the above must be submitted with session proposal.*

# Conference Session Categories

NIRI's objective is to provide a balanced program that meets the variety of interests and experience levels of conference attendees. The session categories are based on the Investor Relations Competency Framework and rooted in the IR Body of Knowledge, which describes the competencies and knowledge essential to performing the investor relations function. Conference session categories are used by attendees and NIRI staff to identify sessions by subject area. The five categories include:

**IR Strategy and Planning –** *Including: Strategy formulation to achieve fair valuation; Company brand and reputation management; Planning and policy formulation; Development of budget and evaluating expenses against budget; Reporting to management, boards, and external; Measuring IR performance; Assessment of the quality of the interactions between management, analysts, and investors; Crisis planning and implementation; Establishing effective relationships with key internal business leaders; IR program operations, implementing plans*

**Marketing Outreach & Stakeholder Communications –** *Including: Messaging development; Establishment of a process for message development; Message development effectiveness; Targeting markets and audiences; Execution and measurement of marketing activities; Relationship building*

**Financial Reporting and Regulatory Compliance –** *Including: Financial reporting and analysis; Financial reports and the reporting process; Guidance; Models and forecasting; Regulatory Compliance; Guidelines, policies, processes and practices that comply with applicable rules and regulations; Disclosure committees to ensure effective handling of key communications issues; Regulatory enforcement activities and proceedings; Compliance with exchange listing rules*

**Business Insight and the Capital Markets –** *Including: Industry trends and issues; Competitive analysis; Corporate business model and addressable markets; Educating senior management and employees about key capital markets; Developing relationships with traders, market makers and specialists; Capital structure implications on company story; IR supporting and participating in capital raising and related decisions; Monitoring the views of the company's investors on the company's capital deployment decisions*

**Corporate Governance, Board Relations, and Strategic Collaboration –** *Including: Strategic counsel and collaboration; Leveraging IR information to act as counsel to executive management and Directors; Cross-functional collaboration; Corporate governance; Board and shareholder relationships; Engaging internal groups to ensure consistence disclosure of Director information; Role in annual meetings; Proxy voting trends*

You may also submit a proposal that does not fit into these categories (such as, for example, Professional Development/Career Management/Technology & Innovation/Global, etc.), however, we will have limited session slots available for these.

# Proposal System and Process

Session proposals will be accepted between October 23 and November 18, 2018. Proposals will be reviewed between November and January, and submitters will be notified by January 11, 2019, whether their proposal has been accepted.

NIRI's proposal submission system is an online process which does not allow submitters to begin, save work, and return at a later time to finish. It is recommended that proposals be created in word processing software first, and then pasted into the online system to prevent losing your work due to possible internet connection or power failures. A complete proposal includes the following fields. Incomplete proposals will not be considered.

1. Title (Limit 75 characters): A succinct and interesting description of your session.

2. Primary Category and Secondary Category (if applicable):
   o IR Strategy and Planning
   o Marketing Outreach & Stakeholder Communications
   o Financial Reporting and Regulatory Compliance
   o Business Insight and the Capital Markets
   o Corporate Governance, Board Relations, and Strategic Collaboration
   o Other (Professional Development/Career Management/Technology & Innovation/Global, etc.)

3. Session Format: Identify the format of your session from the following options: General Session, Structured/Panel; Story Telling; Topic Vignettes; Discussion Group Sessions; Edutainment; Workshop/Case Studies.

4. Target Audience: Select the level of experience attendees of this session should have – Foundational (new to IR), Applied (mid-career), or Strategic (experienced).

5. Proposal Narrative (Limit 4000 characters, ~400 words): The proposal narrative is the primary document used by reviewers in selecting NIRI conference sessions. Clearly explain why the issue is compelling to the IR community (and why now) and the proposed structure/flow of the session.

6. Session Abstract (Limit 1000 characters, ~100 words): The session abstract will be used by attendees in selecting a session to attend. Concisely state the issue to be addressed, its importance to the field, the main takeaways of the session.

7. Learning Objectives (Limit 1000 characters, ~100 words): Please provide a minimum of two participant learning outcomes in the format, i.e., "*Attendees will…*".

8. Proposed Lead Speaker/Moderator and Co-Speakers/Panelists (Name, title, company, and contact information for each).

9. Speaker(s) Experience (Limit 1500 characters, ~150 words): Describe how each speaker's experience/knowledge makes them uniquely qualified to present the proposed content. Be specific about the expertise related to the sessions (e.g. specific experience, other related presentations or reports).

Note: Sponsored Sessions are scheduled separately and should not be submitted through the proposal process. Contact NIRI professional development if you have questions or would like to sponsor a session.

## Review Process and Selection Criteria

Session proposals will be reviewed by members of the 2019 Annual Conference Committee (ACC). Committee members are a representative sample of NIRI's membership and the broader IR community. Proposals are evaluated by ACC members on the following criteria.

- *Is it well-defined?* Clearly stated description, purpose, and learning objectives
- *Is it compelling?* Timeliness/relevance of the subject matter and alignment with the IR Competency Framework
- *Is it accessible?* Adaptability of concept(s) to a variety of settings (industry, size, career level)
- *Is it effective?* Likelihood of achieving stated learning objectives through the intended session format, including allocation of session time
- *Is it the right person/people?* Appropriateness/effectiveness of presenters
- *Is it experiential?* Top-rated sessions typically involve attendees in the experience which facilitates learning, and creates lasting, positive memories

Proposals are then ranked based on reviewer ratings. Additional screening may be required to balance the overall program in terms of topics, target audience, and session format. Not all sessions will be accepted. Additional items are also taken into consideration by the ACC Chair, Vice Chairs, and NIRI staff when making final selections.

Additional selection criteria may include:
- The number of additional proposals submitted by an individual and the outcome of those proposals;
- The number of sessions submitted by other individuals from the same institution, and the outcome of those proposals;
- Potential promotional commercial interests in the session or proposed speakers. All proposals should be approached from a thought leadership, rather than promotional perspective.

## Terms and Conditions

The submitter acknowledges and agrees to the following terms and conditions when submitting a session proposal:

- The speaker (s) identified in the submission have or will obtain rights to use intellectual property, thoughts, concepts, or reproductions provided with the submission and ultimately presented in any final form. See [Speaker Agreement](#) for full details.
- Speakers agree to demonstrate thought leadership without promotion of products or services.
- Submitter may be contacted with regards to the submission to: verify information; expand on session topic or concept; or, consider session reformatting, combine with another session, or change speakers.
- Session is submitted with the permission of listed/suggested speakers.
- Speakers are responsible for all related expenses, including travel and accommodation.
- Speakers who are IR professionals or service providers or in an IR-related role will not receive a complimentary registration to the conference. They must register and pay to attend.
- Sessions are accepted at the discretion of the National Investor Relations Institute and its member-based Annual Conference Committee.