



**SIO Three-Year Growth Plan
2008-09 to 2010-11
Summary**

This is a summary of the three-year growth plan for the SIO, as approved by the Board in June, 2008. It was developed through the Board strategic planning process, as well as a series of consultations with SIO members, including a consultation session at the SIO Annual General Meeting in November, 2007.

This plan forecasts growth in the services of the organization to support the development of the SRI industry among three key stakeholder groups: advisors, foundations and pension funds.

As well, the growth plan forecasts an improvement in service to our existing and future members, including: annual national SRI conferences, provision of public policy research capability and creation of industry innovation through partnerships with the academic sector. These will create on-going sources of intellectual and social capital that will foster industry-wide innovation and more successful exploitation of SRI market potential.

Industry Overview

The SRI industry has enjoyed a period of significant growth, driven by unprecedented interest in climate change, and other sustainability and social responsibility issues. In the last few years, the industry has undergone a period of extensive media attention. As well, numerous new entrants have come into the industry, both in Canada and abroad. This is reflected in the results of the SRI Review, which found total 2006 assets under SRI guidelines in Canada at \$503 billion, up from \$65 billion in 2004.

In spite of this growth, there continues to be an underlying sense that SRI is not meeting its potential growth. Industry experts believe that asset growth – while significant -- has not matched the perceived public and media concern with sustainability and social responsibility issues. This would suggest that there continue to be barriers to the growth of the industry. Addressing these barriers is a key priority of the SIO.

Current SIO Services and Products

SIO has a number of core programs, which have been delivered effectively and cost-efficiently over the years. These include the biennial conference, the SRI Review; and our communications activities, including the listserve, News Digest, website and media relations activities; and our policy and advocacy activities.

These programs are high priority activities and resources will be set aside to ensure that the organization continues to deliver high-quality conferences at affordable cost; a Review that is thorough and has good credibility; on-going communications programs that deliver timely and important information to our members, the media and the public; and a policy program that can advance important public policy issues.

Strategic Initiatives 2008-11

In addition to the current services and products, the Three-Year Growth Plan forecasts improvement in services to three key stakeholder groups. These represent new strategic initiatives to address the barriers to growth by the SRI industry. Here is a brief description of these new initiatives:

Advisor Education Program

Advisor education is a key priority of the SIO. SIO will seek to work with Advocis to develop a training course that could be eligible for CE credits. The aim will be to deliver the program in person through roadshows and Advocis chapters, or through an on-line course, or both. The Three-Year Growth Strategy anticipates that the program will be finalized by the Spring of 2009, for delivery to advisors in 2009-10 and 2010-11.

Endowments and Foundations Initiative

To better increase knowledge and awareness of SRI options among foundation trustees, SIO will explore the establishment of an Endowments and Foundations Initiative. SIO will seek to work with the major foundation umbrella groups to deliver this program. The Three-Year Growth Strategy anticipates that the program will be finalized by the Spring of 2009, for delivery to foundation administrators and trustees in 2009-10 and 2010-11.

Pension Fund Roundtable

SIO will invite pension funds with SRI policies to join the organization at the associate level, and to join a roundtable where they can dialogue on SRI issues with the SIO, and one another. Only pension funds that are associate members would be invited to the roundtable. The Three-Year Growth Strategy anticipates that the Roundtable will begin meeting in late-2008, with new members joining the Roundtable throughout 2009-11.

Conclusion

This three-year service plan represents a comprehensive, yet pragmatic approach to SIO's service growth into the next three years. It commits additional resources to ensure smooth delivery of our existing programs, and creates three new strategic initiatives to address the barriers to growth by the SRI industry.

The Plan is based on reasonable assumptions about membership and sponsorship growth, and can be funded out of the organization's membership fees and sponsorship revenues.