

PRI 2019 SIGNATORY SURVEY

We would like to invite you to take part in the 2019 PRI Signatory survey.

The PRI is a signatory based organisation and your feedback on the value and resources that the initiative provides to signatories is invaluable. Your responses will help shape the work we undertake and the value that we deliver to you, both in our next one year plan and the PRI's 2021-2024 strategy.

The survey consists of 36 questions and is structured into ten sections:

1. PRI value and signatory engagement
2. PRI Blueprint priorities
3. Investment practices
4. ESG issues
5. Policy and research
6. Stewardship / active ownership
7. Communications and signatory resources
8. Convene and educate
9. PRI governance
10. PRI strategy

The survey is mainly multiple choice with six only open text answers. The survey should take no longer than 10-15 minutes to complete.

Please note that the online survey has to be completed in one session. The survey questions and possible answers are replicated below for preparation purposes if required.

Please complete the online signatory survey by 18:00 (BST) 27 September 2019.

If you have any questions about the survey please contact governance@unpri.org.

Thank you in advance for your time and comments.

SECTION 1: PRI VALUE AND SIGNATORY ENGAGEMENT

Question	Type / scale
1. Being a PRI signatory brings value to my organisation.	7 point agreement scale: 1. Strongly disagree 2. Disagree 3. Tend to disagree 4. Neither agree or disagree 5. Tend to agree 6. Agree 7. Strongly agree
2. I would recommend the benefits of being a PRI signatory to other similar organisations.	7 point agreement scale
3. My organisation is committed to continue as a PRI signatory.	7 point agreement scale
4. Overall, my organisation is very satisfied with the PRI.	7 point agreement scale
5. Being a PRI signatory enables my organisation to publicly demonstrate its commitment to responsible investment.	7 point agreement scale
6. The PRI is focused on the responsible investment issues that matter most to my organisation.	7 point agreement scale
7. Please highlight one issue that the PRI provides most value for your organisation.	Open comment
8. Please highlight one issue that matters to your organisation that the PRI is not currently focused on.	Open comment

SECTION 2: PRI BLUEPRINT PRIORITIES

In 2017 the PRI launched the 10-year [Blueprint for Responsible Investment](#) that sets the overall direction for our work, including the PRI's three-year strategies. To read about the work undertaken within each Blueprint priority see the [PRI Annual Report 2019](#).

Question	Type / scale
9. Please indicate the importance of PRI's work on the following nine PRI Blueprint priorities for your organisation:	
a) Empowering asset owners	7 point importance scale: 1. Not at all important 2. Unimportant 3. Somewhat unimportant 4. Neither important nor unimportant 5. Somewhat important 6. Important 7. Highly important
b) Supporting investors incorporating ESG issues	7 point importance scale
c) Fostering a community of active owners	7 point importance scale
d) Showcasing leadership and increasing accountability	7 point importance scale
e) Convening and educating responsible investors	7 point importance scale
f) Challenging barriers to a sustainable financial system	7 point importance scale
g) Driving meaningful data throughout markets	7 point importance scale
h) Championing climate action	7 point importance scale
i) Enabling real-world impact aligned with the SDGs	7 point importance scale
10. Please indicate your organisation's satisfaction with the PRI's work on each of the following Blueprint priorities.	

a) Empowering asset owners	7 point agreement scale
b) Supporting investors incorporating ESG issues	7 point agreement scale
c) Fostering a community of active owners	7 point agreement scale
d) Showcasing leadership and increasing accountability	7 point agreement scale
e) Convening and educating responsible investors	7 point agreement scale
f) Challenging barriers to a sustainable financial system	7 point agreement scale
g) Driving meaningful data throughout markets	7 point agreement scale
h) Championing climate action	7 point agreement scale
i) Enabling real-world impact aligned with the SDGs	7 point agreement scale

SECTION 3: INVESTMENT PRACTICES

Question	Type / scale
11. The PRI is a leading global source of knowledge regarding responsible investment practices.	7 point agreement scale
12. PRI investment practice resources (for example, guidelines, tools and case studies) are useful in helping my organisation implement the Principles in a systematic way.	7 point agreement scale
13. Practices the PRI promote help me and my organisation to challenge the status quo in the investment decision making process.	7 point agreement scale

SECTION 4: ESG ISSUES

Question	Type / scale
14. PRI resources on Environmental, Social and Governance (ESG) issues are relevant and useful for my organisation.	7 point agreement scale
15. What would be the three highest priority Environmental, Social and Governance (ESG) issues that your organisation would like the PRI to focus on in the next strategy cycle?	Open comments

SECTION 5: POLICY AND RESEARCH

Question	Type / scale
16. The PRI is effectively contributing to the public debate about responsible investment using the results of research and analysis.	7 point agreement scale
17. The PRI is effectively influencing public policy with respect to responsible investment.	7 point agreement scale

SECTION 6: STEWARDSHIP / ACTIVE OWNERSHIP

Question	Type / scale
18. The PRI provides my organisation with a forum to engage with various stakeholders on environmental, social and governance (ESG) issues.	7 point agreement scale
19. PRI's support helps us to be ambitious in our active ownership influence.	Yes / no
20. PRI's support helps us to be more focused in our active ownership activities.	Yes / no

21. The PRI's Collaboration Platform is a useful tool for:	Please pick one or more options: <ul style="list-style-type: none"> ■ collaborating with other investors on company engagement ■ shareholder resolutions ■ sharing of valuable ESG insights ■ none of the above ■ N/A - my organisation does not use the platform
22. The collaborative engagements coordinated by PRI (for example, Climate Action 100+, PRI collaborative engagement on labour practices in agricultural supply chains, Investor Initiative on Sustainable Forests) enable my organisation to work with other investors to achieve change amongst investee companies on issues we consider important.	7 point agreement scale and 'not applicable as I have not joined a PRI collaborative engagement'.
a) Why have you not joined a PRI coordinated collaborative engagement?	Please pick one or more options: <ul style="list-style-type: none"> ■ Lack of resources ■ Limited relevance of the ESG issues covered ■ Limited exposure to target companies ■ Lack of alignment with our active ownership approach ■ Other please specify ■ N/A – I was not aware of them
23. Would you value further resources from the PRI to support collaborative engagement?	Yes / No
a) If yes, what additional support from the PRI would you value most?	Open comment

SECTION 7: COMMUNICATIONS AND SIGNATORY RESOURCES

Question	Type of question / scale
24. There are effective communication channels between the PRI and its signatories.	7 point agreement scale
25. The PRI's website is informative.	7 point agreement scale
26. The PRI's website is user-friendly.	7 point agreement scale
27. The monthly PRI newsletter provides a good overview of PRI activities.	7 point agreement scale
28. The PRI is positioned as a thought leader in the media on ESG issues and responsible investment.	7 point agreement scale
29. What types of formats for ESG and RI information does your organisation find the most useful?	Please pick your top three. <ul style="list-style-type: none"> ■ Reports ■ Short articles ■ Case studies ■ Due diligence questionnaires ■ Toolkits ■ Blogs ■ Podcasts ■ Interactive websites

	<ul style="list-style-type: none"> ■ Webinars ■ None of the above
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SECTION 8: CONVENE AND EDUCATE

Question	Type of question / scale
30. The PRI in Person conference is a leading global event for responsible investment practitioners.	7 point agreement scale and 'N/A – My organisation has never attended the PRI in Person conference'
31. Regional/ local PRI events are valuable forums for learning and networking for my organisation.	7 point agreement scale and 'N/A - My organisation has not attended regional / local PRI events'
a) Why has your organisation not attended any PRI organised regional / local events?	<p>Please pick one or more options:</p> <ul style="list-style-type: none"> ■ I am too busy to attend events in my region. ■ The content of PRI events is not relevant to my organisation. ■ I attend events hosted by other organisations that better satisfy my needs. ■ I was not aware PRI events were taking place in my region. ■ PRI events in my region are not accessible (due to their timing, location, etc.). ■ Other (please specify).
32. The PRI allows me to identify and network (in person and online) with other relevant responsible investors outside my home market.	7 point agreement scale
33. PRI webinars and online education services are valuable to my organisation.	7 point agreement scale and 'N/A – My organisation has not participated in a PRI webinar or online education'

SECTION 9: PRI GOVERNANCE

Question	Type / scale
34. I understand the role of the PRI Board and the PRI provides an appropriate level of disclosure relating to the board's activities.	7 point agreement scale

SECTION 10: PRI STRATEGY

The PRI is a signatory based organisation and we would like your input in the next 2021-24 strategy.

Question	Type / scale
35. What would be the three highest priority responsible investment activities that your organisation would like the PRI to focus on in the next strategy cycle?	Open comments
36. Please provide any other comments on the value that the PRI provides (or could provide) to signatories.	Open comment