REQUEST FOR PROPOSALS: DIVERSITY EQUITY & INCLUSION REVIEW

The PRI Association is inviting requests for proposals from organisations or individuals qualified to undertake an review of the PRI's workplace diversity and inclusion practices.

AIM

The PRI’s purpose is to work with its 3000+ investor signatories to incorporate environmental, social and governance (ESG) factors into their investment and ownership decisions. It is a mission driven organisation that has a global workforce of over 150 staff, based across 15 countries, under 6 business entities. As such we recognise the right of everyone to be treated with dignity and respect as set out in our human rights policy - and to this end it’s important to ensure that our organisation in all aspects prioritises diversity, equity and inclusion. Furthermore, we believe that doing so is not only consistent with our mission but is also beneficial to our organisational effectiveness.

We are therefore seeking to work with an expert on this topic to guide us in the best practices that an organisation like ours can seek to implement to improve the overall diversity, equity and inclusion practices of our organisation. We would expect such an expert to conduct a review of our current global people management practices and produce a list of practical recommendations to enhance our practices and thereby seek to improve the diversity, equity and inclusion of our workforce. All diversity characteristics are within the scope of this project.

This project is sponsored by the PRI leadership team, with the support of an already established Diversity & Inclusion Group, made up of staff representatives from across the organisation.

Whilst the PRI is already undertaking a number of activities to promote greater diversity, for instance within our recruitment practices we are eager to seek practical actions or activities we can implement to drive this ambition further. We would expect the review to include an analysis of the following areas, although this list is not exhaustive and we would be guided by the successful organisation or individual:

- Measurement and benchmarking
- Recruitment
- Culture
- Training and development
Communication
Policy

TIMELINE & DELIVERABLES

We expect to appoint the successful organisation or individual in December after selection interviews with the Chief People Officer, another member of the leadership team and a representative from the Diversity & Inclusion Group.

The following timelines are open to some flexibility dependent upon the availability of the successful organisation or individual.

**January and February** – an ‘as is’ review of our diversity and inclusion practices. This will likely involve interviews or workshops with a range of internal staff including the CEO, leadership team, HR team and Diversity & Inclusion Group, along with other members of staff from minority groups within the workforce.

**March** - develop and test a set of recommendations culminating in the presentation of a final report by the end of the month.

KEY QUESTIONS

When submitting your proposal, please include answers to the following questions, limiting your response to each question to **500 words**. You may provide supporting information in appendices:

1. What experience do you have in undertaking diversity reviews? Provide specific evidence of any experience you have working with not-for-profit, mission driven or membership organisations.
2. What knowledge or expertise do you have in analysing practices around all diversity characteristics?
3. What experience do you have working on diversity for global organisations?
4. Please provide examples of similar reviews you have performed, ideally including details of an organisation that would act as a reference for us to speak to.
5. Please include a project plan for conducting the review and producing the recommendations, including timeline.
6. Who will be the lead person and who will support in this project, highlighting the specific skill set and experience they bring to the project?
7. What is the total fee you would charge for this entire piece of work, given our not-for-profit status?

SELECTION CRITERIA

- Understanding of the brief
- Experience in conducting diversity & inclusion reviews across all diversity characteristics
- Robustness of recommendations produced
- Value for money
FURTHER INFORMATION & DEADLINE FOR SUBMISSION

For any questions of clarification please email Lian Hillier, Chief People Officer at lian.hillier@unpri.org

Deadline for submission is 17.00GMT Monday 30th November 2020.