BACKGROUND

The PRI is the world’s leading proponent of responsible investment. It works:

- to understand the investment implications of environmental, social and governance (ESG) factors;
- to support its international network of investor signatories in incorporating these factors into their investment and ownership decisions.

The PRI is truly independent. It encourages investors to use responsible investment to enhance returns and better manage risks, but does not operate for its own profit; it engages with global policy makers but is not associated with any government; it is supported by, but not part of, the United Nations. It manages a unique annual signatory reporting cycle which provides a wealth of data on RI policy and practices at our global signatory base.

2021 saw the PRI introduce a revised reporting framework. This was a pilot year which received significant feedback from a range of signatories. We have also collected a wealth of data and information on the responsible investment activities of all our global signatories. In this project we are specifically interested in investigating and publicising trends and themes among our asset owners (corporate & public pension funds, endowments & charities, sovereign wealth funds and insurers) in our signatory base.

PROJECT AIMS

To this end, we are intending to appoint a consultant to help with the analysis of data collected during the pilot year on asset owners, identify themes from the data and provide some reflections on leading practice.
The content includes data collected from:

- **Senior Leadership Statement** (SLS 1)
- **Responsible investment policies** (ISP 2),
- **Selected questions and data points from the SAM module** (SAM 1 – 16),
- **Climate for asset owners** (ISP 26-39)

The consultant would work closely with internal individuals on the Investment Practices, Signatory Relations and Reporting Data teams to deliver this project but report directly to the Director of Investment Practices.

The key skills required will include:

- Background knowledge to some of the key global themes effecting asset owners with respect to responsible investment,
- A record in delivering concise written work and:
- An ability to filter and analyse large amounts of both qualitative and quantitative data

**ACTIVITIES AND EXPECTATIONS**

Content to be delivered includes assessment and analysis of:

**Responsible Investment policies**
- Working with internal data teams publish an on-line data bank of RI policies published by AOs
- Provide commentary global or regional themes drawn from a selection of these policies
- With internal teams, to deliver a short summary report, slide set and blog summarising key themes and practices.

**Senior Leadership Statement**
- Working with internal data teams publish an on-line data bank of senior leadership statements published by AOs
- Provide commentary global or regional themes drawn from a selection of these policies
- With internal teams, to deliver a short summary report, slide set and blog summarising key themes and practices.

**Selection, appointment, Monitoring & ISP modules**
- Working with internal data and investment practices team identify questions and data points that will provide important insight into the practices of asset owners.
- Working with internal data teams collate this data in suitable formats and provide commentary and analysis of key themes and practices emerging across signatories from different asset owner categories and geographies.
- Where deemed appropriate we will also review data on practices in relation to climate change.
- Summarise key results and observations

It would be anticipated a final report would extend to approximately 20 -25 pages and be accompanied by a series of blogs and a slide set. The structure of the summary report and final
materials will be provided by PRI. The final report will be edited by PRI’s internal editing and Comms team.

The report would be publicised among our signatory base and be used as a basis for a webinar type event in February 2022.

We have estimated the three elements of the project will each take approximately 8-10 days (24-30 days in total). This can be discussed with the shortlisted consultant.

**DELIBERABLES AND TIMINGS**

The key deliverables for this project are:

The project will run **from October 2021 until February 2022**. Below are suggested timings for the project (with some dates still tbc), to be agreed with the selected consultant:

<table>
<thead>
<tr>
<th>Activity</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deadline for RFP responses</td>
<td>5th November 2021</td>
</tr>
<tr>
<td>Consultant interviews</td>
<td>8th – 12th November 2021</td>
</tr>
<tr>
<td>Project start date</td>
<td>12th November 2021</td>
</tr>
<tr>
<td>Weekly call with Data and Investment practices team</td>
<td>November 2021 – February 2022</td>
</tr>
<tr>
<td>Delivery report draft for internal editing</td>
<td>10th January 2022</td>
</tr>
<tr>
<td>End of project</td>
<td>Mid-February 2022</td>
</tr>
</tbody>
</table>

**HOW TO SUBMIT A PROPOSAL**

Please send your proposal via email to assetowners@unpri.org and cc toby.belsom@unpri.org & diba.ahour@unpri.org by **5th November 2021**. Feel free to contact us for any questions regarding the project or the requests outlined in this document.

Proposals must include:

I. Details should be provided of evidence to fulfil the key skills outlined in this RFP;

II. Knowledge of and experience in working with institutional investors.

III. A brief biography of individuals that would be involved with indication of their locations.

IV. Availability for the requested period / ability to achieve deadlines.

V. Proposals should not extend over 5 pages