PRI IN PERSON 2024 INVITATION TO TENDER

The PRI is inviting proposals from organisations for support in running the logistics and associated functions for our global conference in Toronto, Canada at the Metro Toronto Convention Centre on 8-10 October 2024.

ABOUT THE PRI

PRI in Person is organised by the UN-supported Principles for Responsible Investment (PRI; www.unpri.org). We are a membership organisation which exists to encourage and support our members – c.5,500 institutional investors globally – to incorporate environmental, social and governance factors into their investment decision-making.

PROJECT OVERVIEW AND CONTEXT

PRI in Person is a large, complex global conference. It takes place in a different location each year and attracts 1500-2000 delegates from the responsible investment community (for example, asset owners, investment managers, service providers, policymakers and NGOs). The three-day event comprises a six-stream conference programme, a major evening networking event in a venue near the conference and an exhibition with approximately 30-40 stands. For reference, please see here the conference agenda for 2023 and you can view the recordings from the 2022 event here.

PRI also organises additional side events that take place onsite outside of the main agenda. As a guide, this may include two or three half day conferences each with approx. 10-15 speakers and 100-200 participants. These would take place within one of the PRI in Person breakout rooms before the start of PRI in Person or after the close on the last day. Most, but not all, participants will also attend the main conference. We also typically host approximately 6-10 smaller meetings throughout the week ranging from 10-50 participants which usually take place during the mornings before the start of the main agenda and have minimal AV requirements. We would host these in separate smaller meeting rooms within the same venue. In addition, though not organised by PRI, we also find that several organisations organise side events to coincide with the conference. We do help to promote these events, but do not coordinate them. Sell all related events from Tokyo here.

Both the PRI and PRI in Person have grown rapidly. The conference regularly sells out, and sponsorship revenues have increased dramatically in the last five years. The total revenue for the event, including delegate fees and sponsorship, is anticipated to be in the region of US$4m-$5m in 2024. While the PRI is not run for profit, there is an expectation that the event will generate a surplus. As well as growing financially, PRI in Person has grown in stature, and now attracts a large number of side events and has the power to generate a buzz in the local market (for example, for the Tokyo event in 2023 the Japanese government co-ordinated a programme of sustainable finance events around our conference, and the Prime Minister made some relevant announcements in a keynote address).

The 2024 event will be the 16th edition and will be held in Toronto at the Metro Toronto Convention Centre on 8-10 October.

Historically this event has been managed by the PRI’s events team with support from various specialist suppliers such as venue finders, DMCs, registration/platform management, production/AV, etc. Due to the growth of the event and a refocusing of organisational objectives, we are now seeking to outsource the management of the event in a more
structured and holistic way. As of October 2023, the conference venue is booked but no other suppliers have been contracted yet.

**REQUIREMENTS**

We are looking for a partner to:

Co-lead the overall project management of the event and of the PRI organised side events – from a logistical perspective – with the PRI and act as a single point of contact for all/most of the other conference suppliers;

Source quotes, negotiate contracts and manage relationships with venues, AV\(^1\), caterers, stand contractors, signage providers, onsite staffing agencies, suppliers of branded goods, security providers, internet/Wi-Fi providers, and other event suppliers;

Liaise with the graphic designer and take responsibility of the delivery of all event related branded assets including all online assets and onsite signage, as described below

Offer fresh insights and ideas, in terms of both creative and innovative delegate experiences and efficiencies to the event management process;

Keep environmental and social sustainability front-of-mind in all their work for us (and be prepared to communicate about efforts made and policies implemented), in keeping with the PRI’s core function and values.

There may also be the potential to do the following:

- Continue to work with us on a long-term basis as the event moves through different locations globally; and
- Contribute ideas on sponsorship packages, delegate add ons, pricing and other revenue streams related to the event;
- Take on some or all of the graphic design work associated with the event, including the look and feel of the website, email marketing assets, social media assets and other pre-event promotional materials and onsite branding such as signage, stage sets, etc.;
- Co-ordinate a programme of externally-organised side events to help amplify the buzz of PRI in Person in the Canadian market. Please note that the PRI’s role would be to put external organisations in touch with the appointed agency to help with venue finding and/or event support, as well as listing these on our platforms (the website and conference app). All external side events details need to be tracked in one place including title, date, time, venue, room name, organiser, onsite contact, etc. As a guide, in Tokyo there were approximately 40 external side events including both public and private breakfast meetings/workshops, half-day events, drinks receptions, dinners and small group meetings. External organisations would be responsible for paying for any services provided by the agency that go beyond the tracking and communicating of the schedule.

While we welcome input from suppliers on the structure of the event and the mechanisms with which we engage delegates, we do not expect conference production (agenda development and speaker acquisition) to fall within the scope of this relationship.

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\(^1\) For AV, the PRI is likely to continue working with the same external AV Project manager, who ensures all AV requirements are met, creates a Run of Show document ahead of the event and attends the conference with a team of AV engineers to ensure the event runs smoothly. Submitted proposals should therefore include time spent liaising with this provider, but not account for this work itself.
INFORMATION REQUESTED FROM VENDORS

In the first instance, we invite event agencies to provide the following information:

1. An overview of how you would approach this project: timelines, how you would resource the project from a staffing perspective, how you would work and communicate with us, etc.
2. An outline of what qualifies you to conduct this project: experience with similar types of event (i.e. where you have planned and organised all logistical aspects of the event) or organisation, global reach, supplier networks, etc.
3. An overview of your pricing structure and a provisional cost breakdown for this project.

SELECTION PROCESS AND CRITERIA

We are looking to begin actively working with an agency by early January at the latest. To this end, the timescales for the tender are as follows:

- 23 October: tender opens
- 30 October – 15 November opportunity for short calls to discuss bid preparation, if requested
- 15 November: deadline for submitting bid, see exact time below
- 23-30 November: meetings with 2-3 shortlisted agencies, (we request that the main project lead for this event is present for these discussions)
- 4 December-13 December: further meetings, follow up and due diligence as required
- By 15 December: agency appointed and contract signed

The PRI’s Director of Marketing & Signatory Experience and the Senior Event Manager for PRI in Person will co-lead on the selection process. Other stakeholders may give input and the choice of agency will ultimately be signed off by the PRI’s Chief Operating Officer.

When reviewing bids, we will evaluate agencies on the following criteria:

- Capability and capacity to deliver a project of this scale within the timeframe
- Understanding of PRI in Person, the PRI, its audience, strategic goals and business model
- Experience or knowledge of the Canadian events industry and suppliers
- Global reach (i.e. capacity to continue the relationship in future regardless of event location) and experience/knowledge of global conferences
- Cultural fit
- Cost
- Sustainability

HOW TO BID

Please contact the Senior Event Manager, elena.dietmann@unpri.org to:

- request more detailed briefs about logistics for PRI in Person, such as AV and exhibition details.
- send any initial enquiries to help you prepare your proposal.
Bids should then be submitted to Elena Dietmann via email by 15 November. We will acknowledge receipt within one working day, and will endeavour to respond by 22 Nov.

**DEADLINE FOR SUBMISSION**

As per the process above, the deadline for submissions is **17:00 GMT, 15 November 2023**.