

REQUEST FOR PROPOSALS: COMMUNICATIONS SUPPORT

17 June 2024

The UN-supported Principles for Responsible Investment (PRI) is inviting Requests for Proposals ('RFPs') from individuals or organisations qualified and interested in providing media relations and social media support at PRI in Person in Toronto, Canada. The event is being held from 8-10 October 2024. The RFP outlines support in phases before, during and after the event.

Strong existing relationships with print, online and broadcast financial/responsible investment media globally as well as in Canada and Toronto are essential for the individual / organisation selected for this work.

BACKGROUND

The PRI is the world's leading proponent of responsible investment ('RI'). It is a global membership organisation founded in 2006 by a small group of investors in partnership with the UN Global Compact ('UNGC') and UNEP Finance Initiative ('UNEP FI'). The organisation works to understand the investment implications of environmental, social and governance (ESG) factors and support an international network of investor signatories in incorporating these factors into their investment and ownership decisions. Since it was founded, the PRI has grown significantly, and responsible investment has entered the mainstream.

The organisation now has more than 5,000 signatories in over 80 countries with over \$120 trillion in AUM – which is more than half of global institutional capital.

PRI in Person is the organisation's flagship conference bringing together delegates from around the world including signatories, policymakers, academics and other stakeholders. The event is held in a different location every year.

In 2023, PRI in Person was held in Tokyo, Japan. Nearly 1,400 delegates attended. The theme was 'moving from commitments to action', and across nearly 40 conference sessions and 50 side events, high profile speakers (including the Japanese prime minister) and delegates from across the responsible investment community came together to learn, network and share knowledge on the latest responsible investment trends, challenges and opportunities.

DEADLINE FOR SUBMISSION

The deadline for submissions is 17:00 GMT 2 July 2024. We will aim to conduct interviews in the first half of July with a view to appoint an individual or agency.

OBJECTIVES

1. To position PRI in Person as one of the major global conferences on responsible investment (highlighting the expertise and thought leadership on offer at the conference).

2. To raise awareness of responsible investment themes and issues in the Canadian and global market via external comms channels.

KEY POINTS TO RESPOND TO IN PROPOSALS

Scope of Work – Press

Support for a period expected to be three months (mid-July – mid-October, 2024)

This would include:

- Preparation phase (mid-July to mid-August)
 - Strategy & counsel
 - Monthly or bi-weekly calls with PRI
 - Drafting narrative and media hooks for the conference
 - Media mapping focusing on Canada
 - Guidance on communications to potential delegates in Canada and beyond to increase registrations
 - Developing media lists covering Canada (including national outlets, print, broadcast online, trade & specialised press – with input from PRI Communications)
- Implementation phase (mid-August to mid-October)
 - Outreach
 - Pitching, scheduling interviews or following up with journalists from the global media list (maintained by PRI)
 - On-site attendance and support
 - Presence of a team member (or members) at PRI in Person in Toronto to support PRI press on the ground for the days of the conference
 - Setting up/attending interviews and/or press briefings on the ground in Toronto
 - Prep meeting for the PRI team attending PRI in Person (specifically spokespeople) ahead of the event (tbd if in person in Toronto or virtually)
 - Post-event
 - Post-event follow-up (follow up with journalists to maximize coverage, provide media monitoring reports until mid-November, submit engagement report including key press coverage and social media metrics.
 - Help to build momentum for PiP 2025

Staffing – At least one team member to help with supporting press team on the ground with media relations activities.

Scope of Work - Social Media

The plenaries at PRI in Person will be livestreamed, and other sessions will be available via on-demand video. Social media will be particularly important to reach audiences not attending in person.

Below are our objectives for the social media briefing. The possible approach is based on PRI in Person last year, and these are suggestions only as respondents prepare proposals. PRI's main social media channels are Twitter/X and LinkedIn.

1. Pre-event

Objectives:

- Generate delegate registrations
- Generate traffic to event website

Possible approach:

- Strong visual component, e.g., photos of speakers with quotes, photos of delegates during the event, leading up to the event, focusing on agenda highlights, etc.
- Ensure we are following speakers and sponsors and sharing their content, particularly when the subject matter is relevant to the event
- Extensive use of event hashtag to get people used to using it
- Paid social ads on LinkedIn to drive event registrations

Content:

- Tweet/post to encourage registration
- Tweet/post when registration deadline is approaching (e.g., Just one week to register)
- Confirmation of new speakers (likely to be announced in three rounds)
- Share news content related to event content
- Share data/infographics related to event content
- Share feedback / testimonials from last year as quotes

Measurement:

- Link with UTMs to registration site included in all posts, so all clicks can be tracked
- Any other measurement metrics recommended by the agency

2. During event

Objective:

- Create buzz and community feel for people who are there
- Highlight the event and content to those not attending in person to create a strong sense that it's a global event with a strong focus on the digital audience
- Encourage delegates to share reflections, thoughts on social media in real time (this will also help to inform the agenda for PRI in Person 2025)

Staffing – At least one team member to help with creating digital content onsite (in addition to the press-focused team member/s) – interviewing with speakers/delegates (Vox pops), making short video/podcast summaries of the day, polls/discussions for non-delegates, etc. and live social media posting and preparation.

Approach:

- Hashtag to be displayed prominently on all event materials
- Group posts by using event hashtag
- Source speaker tags on LinkedIn and Twitter/X for all speakers
- Use speaker @usernames to encourage them to retweet @PRI_News / repost from PRI LinkedIn account
- Encourage staff and partners to post to build community around the event

Content:

- Tweet/post interesting quotes from the sessions, have someone on site to create quick quote cards as well
- Vox pops
- Potential launch of flagship PRI content
- Repost pictures of event delegates' posts (e.g., in 2022 there was a viral post of an all-female panel taken by a delegate)
- Post already developed photos from the event, not just photos taken on phones
- Twitter thread recapping the events and sessions that happened during the day

3. Post-event (for 1-3 weeks)**Objective:**

- Build momentum to PRI in Person 2025 by highlighting the success of the 2024 event

Approach:

- Capitalise on momentum generated at this year's conference to start building excitement for next year (the location will likely be announced at the conclusion of the Toronto conference)

Content:

- Links to post-event press coverage
- Extracts from event highlights report – speaker photos/videos, key stats from delegate feedback, etc.
- Tweet/post videos from the event
- Tweet/post key quotes from event sessions and speakers
- Tweet/post key delegate testimonials and quotes

Measurement:

- Track number of signups to online "register your interest" form.

Measurement and reporting

Report at the end of the conference in user-friendly format will capture several metrics including hashtag usage, number of contributors, impressions generated, top-performing posts, etc.

SELECTION CRITERIA

The applicants will be judged on a proven track record of attracting media coverage in Canada, and by default, strong existing relationships with media in Canada and Toronto.

Prior experience in responsible investment, supporting large-scale events, working with a global organisation and a sophisticated understanding of the media landscape will each be key criteria responses are judged against.

An estimated fee guide is not being provided in this RFP, but respondents should be conscious that PRI is not-for-profit organisation. That said, it recognises the importance of this work.

SUBMISSION AND CONTACT

For any further clarifications and to submit proposals, please email rojin.kiadeh@unpri.org and jon.mcgowan@unpri.org