

DIVERSITY, EQUITY AND INCLUSION POLICY (CONFERENCES & EVENTS)

This note is prepared in addition to the PRI's Diversity, Equity and Inclusion (DEI) Policy, which embeds these values as core to our organisation. The DEI Policy sets out the PRI's commitment to creating an inclusive working culture which enables all employees to thrive. It strives to create a diverse workforce which will bring different perspectives, knowledge and life experience to bear. We believe it is also important for the PRI to uphold these values through its external communications, such as events.

Version no.	Approved by	Owner	Approved by date	Date last updated	Review date	Review frequency	Next review date
1.02	Esther Teeken	Lucy Kallen	8.12.23	14.12.23	16.11.23	Every two years	14.12.25

STATEMENT OF INTENT

There is a need to build equitable processes and create opportunities for underrepresented groups. The PRI recognises the inherent value in bringing a wide range of perspectives to debates around responsible investment. As a prominent voice in the industry, we believe that by demonstrating our commitment to these values, we can contribute towards reducing social inequalities in the industry as a whole.

OUR COMMITMENTS

- We will actively seek diversity among speakers at PRI-led events, including but not limited to gender identity, race/ethnicity, and persons with disabilities;
- We are committed to making every best effort to include female, non-binary or gender non-conforming (GNC) representatives on any panels that we are responsible for organising. For PRI-led events, the PRI staff member responsible for the session content is expected to ensure compliance with this policy;
- Where the PRI is approached by the industry to speak on a panel, PRI male staff members will not participate in sessions where the moderator and panellists do not include a female, non-binary or GNC individual. For non-PRI events, the line manager authorising the speaking role is expected to ensure compliance with this policy;
- Where we are co-hosting an event with a signatory, stakeholder or industry partner we will work collaboratively to include a diverse mix of representatives on any panels. We hope to encourage others to adopt this policy across the industry, and are aware that many organisations have already done so; and
- We will monitor and record gender and race/ethnicity of speakers across all our events and report on this to the Board annually. Please see our [Privacy Policy](#) for more detail.

PROCESS TO ASCERTAIN DIVERSITY AT NON-PRI ORGANISED EVENTS

All PRI colleagues participating in external events should ask organisers the following questions before agreeing to take part:

- What have you done to ensure there is diversity on the panel/at the event? Is our panel an all-male panel?
- Do you collect data on the diversity of your speakers, and can you give us a high-level overview of what the data shows?
- What assurances can you give that you have made every best effort to ensure a mix of speakers for this event?

If you are unsure about the quality of the responses you receive¹, you can share these with Head of DEI Lucy Kallen for guidance on next steps.

¹ A strong response would outline that they do collect diversity data, and that efforts are being made to ensure diversity on the panel. Recognising that diversity data collection may not always be possible, an acceptable response is that they don't collect data but they do care about DEI and have made efforts to diversify the panel. An unacceptable response would be along the lines of either ignoring the questions entirely or suggesting that they haven't reflected on the diversity of the panel at all.

WHY FOCUS ON GENDER?

All forms of diversity are positive, however focusing on one characteristic does not need to be to the detriment of others. This policy is committed to ensuring we don't participate in any all-male panels due to our commitment to gender diversity and the reputational risk associated in participating in "panels". Most organisations now collect gender data, and the DEI conversation is most advanced globally on this topic. Women/GNC/non-binary people constitute at least 50% of the population globally and therefore it is fair to expect organisations to be able to source gender diverse speakers in most circumstances.

MONITORING

The Events team will monitor the diversity of speakers at each event the PRI runs by ensuring a diversity monitoring form is sent to all speakers. To be clear, completion of this form is entirely voluntary for speakers.

We will only collect DEI data on events organised by us and it would be in contradiction with global data protection laws to ask for individual DEI data on speakers where we are not the event organiser. No other form of speaker data collection/analysis should be undertaken by colleagues at the PRI.

Along with the DEI Policy we will review the DEI Policy (Conferences & Events) at least every two years. The policy will be posted on the company intranet and is required reading for all employees, contractors and consultants.

DEFINITIONS

A panel constitutes an event with three or more concurrent speakers. This would exclude "in conversation" style events with two speakers only.

We consider an all-male panel to include a panel with a male, female or non-binary moderator and only male panelists. In the event that no female or non-binary panelists are available, having a female or non-binary moderator is the next best option, but a diverse panel should include female/non-binary panelists positioned as experts in their field.

HOW TO HANDLE LAST-MINUTE CHANGES

We appreciate that, despite all appropriate due diligence having taken place, sometimes last-minute changes can disrupt the balance of speakers at an event. We do not, in these circumstances, advocate for any PRI speaker dropping out of an event if these changes result in an all-male panel, for example, as this would be unprofessional and damage our reputation. We would of course expect that any PRI colleague would support the event organisers in making every best effort to seek out a replacement with diversity in mind. Even if the drop out is at very short notice before the event, for example, the day before, you (as session owner for the PRI event) or the external organiser (at the prompting of the participating PRI speaker) should make the effort to approach a potential non-male replacement, including viable candidates working for the PRI. If all the above options have been exhausted, we as organisers can "call out" the lack of diversity at the outset of an event to acknowledge the gap, and highlight steps taken to address this. Speak to Lucy Kallen if you need support with wording for this.

Consideration for any exemptions needs to be signed off by the relevant Executive and there should be a strong reason given for this. If we are comfortable after our initial questioning that the organisers have made every best effort to obtain gender diversity, and have managed to represent other characteristics/perspectives, then we may consider taking part. However, this should be exercised with extreme caution as this is likely to be “called out” by attendees. For example, we would consider every best effort to be approaching a minimum of three female/GNC/non-binary speakers for each position (e.g. keynote, panels, moderator).