

Finance for Biodiversity

Engagement templates

Annex 2 to the Guide on
Engagement with companies



[Weblink to Engagement with companies Guide](#)

More and more financial institutions are starting to engage with companies on biodiversity. This document provides templates for setting up a biodiversity engagement and for tracking and following up on engagement actions.

Annex to the Guide on Engagement with companies

This document serves as an annex to chapter 2 of the Guide on Engagement with companies. The templates in the next two sheets correspond to tables 2 and 3 in the Guide.

Two templates to plan, structure, and perform engagement

We propose two templates for planning, structuring, and performing engagement and following up on progress. They indicate relevant steps to take and information to gather to ensure successful engagement execution.

The **first template** can be used when setting up an engagement. It structures the documentation of 1) general information on the issuer and the biodiversity challenge, 2) engagement objectives, targets and indicators, and 3) contacts with the issuer, thus facilitating monitoring of progress and reporting on actions taken.

The **second template** helps to structure the actions taken, the issuer's / client's responses to the requests and the follow-up steps (to be) taken. At each stage of the engagement (every round of engagement) the second template should be updated. This will allow tracking engagement impact and results in relation to the engagement and investment timelines. Such follow-up against the engagement timeline will also help to identify an adequate moment to pass to an escalation tactics, which in some cases will be a real turning point for an engagement to be successful and to reach the targets set.

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1. Setting up an engagement

[illegible]

2. Tracking engagement actions

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