# SOCIAL FINANCE’S DEI ACTION PLAN: OVERVIEW

## 1. Supporting DEI Accountability

1a. Establish specific annual goals around DEI across functions within the organization

1b. Establish process to track metrics and conduct regular audits of progress against goals

1c. Establish regular cadence for sharing information and progress to team and board

## 2. Aligning & Communicating on DEI

2a. Finalize and launch Social Finance DEI Definitions & Beliefs statement and Action Plan

2b. Launch a detailed and robust DEI communications guide

2c. Establish protocol for formal communications around DEI current events (internal and external)

2d. Establish an external communications plan for our DEI strategy and progress

## 3. Expanding DEI Capacity & Engagement

3a. Establish a DEI Governance Committee to lead, own, monitor DEI action plan and strategy

3b. Develop capacity of project teams to integrate DEI goals into project work (training, infrastructure, resources, staffing)

3c. Develop capacity of teams to support incorporating community voices in our project work (mechanisms, resources, practices and tools)

3d. Provide annual coaching and DEI training for entire team (tailored by roles and responsibilities)

3e. Embed DEI responsibilities as part of formal job descriptions within HR / Talent roles

## 4. Recruitment & Hiring

4a. Establish operational infrastructure to execute and support accountability to DEI in hiring

4b. Ensure recruitment process and communications promote equity / level playing field, encouraging candidates from diverse backgrounds to apply and supporting them as they do

4c. Review total reward programs within hiring and consider improvements

## 5. Talent Systems & Supports

5a. Develop a talent philosophy for Social Finance to outline values undergirding all talent systems and processes

5b. Conduct bias audit across all talent systems to evaluate whether bias exists and work to address and mitigate

5c. Build out existing onboarding and skills-based training infrastructure to ensure team members across diverse work experiences can develop the skills they need to thrive in their roles

5d. Build and increase access to networks and programming that foster an inclusive and supportive work environment

5e. Integrate commitment to DEI into Performance Review and development support infrastructures