

Social Finance 2022-23 DEI Output Goals By Priority Area

[1] Supporting DEI Accountability

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| Complete | Launch DEI Action Committee to lead, own and monitor DEI Action Plan. |
| Complete | Determine taxonomy for developing DEI goals at Social Finance—define output and outcome goals. |
| In Progress | Publish first annual DEI goals for the organization, focused on output goals that the Committee commits to completing in initial years. |
| In Progress | Determine appropriate cadence and format for sharing information and progress on DEI initiatives to team and to board. |
| Q3 | Engage outside expertise and develop best practices for developing outcome-based DEI goals, in preparation for defining and launching the first DEI outcome goals in 2023. |
| Q4 | Determine best practices, tools and methods for gathering data to measure progress each for diversity, equity and inclusion at Social Finance. |
| Q1 | Pilot tracking and data collection methods to establish new infrastructure and determine baselines to support developing DEI outcome goals. |
| Q1 | Pilot new reporting practices, gathering feedback and adjusting as appropriate to establish new standard practices. |

[2] Aligning and Communicating on DEI

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| Complete | Launch a detailed and dynamic DEI language guide tool for the team. |
| In Progress | Determine protocol for formal communications around DEI current events, both externally and internally. |
| In Progress | Establish a communications plan for communicating our DEI strategy, goals, and progress externally. |
| In Progress | Define an ongoing strategy for incorporating DEI into our external communications practices and pilot practices in 2022. |
| Q3 | Publish DEI strategy, goals and progress on website and pilot external communications plan. |
| Q3 | Pilot new communications practices around DEI current events, gathering feedback and adjusting as appropriate to establish new standard practices. |

[3] Prioritizing DEI In Our Work

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| Complete | Conduct an internal review of current team practices for prioritizing DEI in project work. |
| Complete | Conduct secondary research on indicators we can use to understand if DEI has been prioritized in project work and the foundational knowledge our teams need to understand in order to prioritize DEI. |
| Complete | Write a discovery report sharing findings of the above two activities with the team. |
| In Progress | Write an action report outlining practices, resources, and tools that teams can use to prioritize DEI across different phases of project work. |
| In Progress | Develop and pilot 3-6 of the resources outlined in the action report, e.g., team kickoff discussion guide, proposal review guide, process for interviewing program participants, and onboarding deck. |
| In Progress | Build implementation plan and team training for how to use the resources/tools and institutionalize them into project work. |

[4] Recruitment and Hiring

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| Complete | Launch new applicant tracking system to enable operational infrastructure to track data and support accountability for DEI in recruiting. |
| Complete | Ensure that all staff are trained on and appropriately using new applicant tracking system. |
| Complete | Ensure that all staff who are interviewing or interacting with candidates are trained on anti-bias and best practices. |
| Complete | Conduct secondary research to identify most effective DEI recruitment practices and benchmark against competitors in space. |
| In Progress | Communicate findings and recommend changes to current processes to DEI Committee and broader team. |
| In Progress | Establish documentation and train on norms for sourcing candidate diversity for any open positions and pilot new practices. |
| Q4 | Conduct bias audit across all recruiting materials and processes to ensure recruitment process promote equity. |
| Q1 | Research best practices and develop first specific DEI hiring targets and pilot tracking against these targets. |

[5] Talent Systems and Team Support

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| Complete | Embed DEI responsibilities into formal job descriptions for appropriate members of the talent/HR team. |
| Complete | Review and update employee handbook to ensure policies promote equity and are as inclusive as possible. |
| Complete | Engage external consultants to provide unconscious bias training to the entire team. |
| Complete | Establish and support affinity groups on the team, defining membership, budget, programming and HR support. |
| Complete | Add new onboarding module on our DEI strategy at Social Finance, including empowering team involvement. |
| Complete | Define and launch new Fostering Inclusion core competency in performance reviews and integrate into development. |
| Complete | Engage external consultants to provide DEI integrated leadership and management training for all development managers. |
| Complete | Build out programming and establish budget for celebrating diversity throughout the year, including month celebrations, speakers and events. |
| In Progress | Build out onboarding, ongoing, and skills-based training infrastructure to ensure team members across diverse work experiences can develop the skills they need to thrive in their roles. |
| Q3 | Conduct a bias audit across all talent systems to evaluate whether bias exists and work to address and mitigate in areas such as recruiting, onboarding, staffing, and performance reviews. |
| Q1 | Write and publish a DEI talent philosophy for Social Finance to outline values undergirding all talent systems and processes. |