

# PILOT SOCIAL EQUITY LENS INVESTMENT (SELI) CODING SYSTEM

## ANNEX B – SOCIAL EQUITY PRINCIPLES

The Social Finance Fund’s activities are rooted in action according to the principles of addressing systemic bias, encouraging decisions that remove barriers, and ensuring investments reach and support equity-deserving communities:



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### Contextualization

Ensure the investment approach recognizes the unique dynamics inherent in geography, socio-economic factors, stakeholder types, asset class, etc.

### Inclusion

Promote investment processes, decision-making, and underlying organizational culture and processes underpinned by representative lived experience and the needs of those served by capital, with equitable and meaningful participation underpinning this principle. Ensure efforts to be inclusive and representative reflect the intersectionality of equity-deserving groups, meaning the reality that people are often disadvantaged by multiple sources of discrimination: their race, class, gender identity, sexual orientation, religion, ability, and other identity markers.

### Accessibility

Develop opportunities, tools, processes and practices in investment-making to meet the needs of people with diverse abilities and other identity markers, by providing resources, ongoing education and training to remove barriers, foster meaningful inclusion and recognize access dynamics whereby investors determine who is considered 'worthy' to access capital and resources.

### Accountability

Ensure investment strategies are responsive to community needs and that community perspectives are incorporated in a collaborative manner. Develop mechanisms to track and measure progress against stated goals and allocation commitments and demonstrate how power shifts are being realized. Model transparency and accountability in reporting as it relates to impact and performance in social impact.

